



All-Party

Parliamentary Jazz Group

Review of Jazz in England:

an Honest Portrait and an Actionable Roadmap

A Green Paper

Chris Hodgkins and Howard Lawes, with contributions from Kevin Legendre, Steve Crocker, Nigel Tully, Dr Victoria Kingham, Dr Noel Dennis and Sarah Chaplin

2025

<https://appjag.org/>

Foreword

“We are delighted to introduce this Review of Jazz in England, a comprehensive analysis and celebration of jazz. Commissioned by All-Party Parliamentary Jazz Group (APPJG), with the aim of understanding the state of jazz today, this report sheds light on the opportunities and challenges faced by the jazz community across England, from celebrated metropolitan venues to grassroots collectives.

In recent years, the English jazz scene has grown more dynamic and multifaceted, encompassing a wide range of influences that resonate across generations and backgrounds. But while the spirit of jazz remains vibrant, our musicians, promoters, educators, and venues face unique pressures that have been intensified by economic and cultural shifts, not least the impact of the Covid-19 pandemic.

*This review offers timely insights into these changes, mapping the landscape of jazz from the perspectives of those who live, perform, and support the music. Through data, interviews, and community feedback, it provides **an honest portrait** of the jazz ecosystem, highlighting both areas of growth and the need for structural support. The findings make clear that jazz, though often on the margins of commercial music, continues to be a vital part of England’s cultural fabric. Moreover, the report identifies pathways for nurturing the future of jazz, stressing the importance of investment, education, and inclusivity to ensure its continued legacy.*

The Review of Jazz in England, carried out by Chris Hodgkins and Howard Lawes, is a consultative green paper and the APPJG, whilst happy to receive thoughts and ideas, is very keen to see action. With this in mind, we urge the Government to act on the findings within and to engage with the sector to better understand the challenges and opportunities our sector faces

Meanwhile, the APPJG plan to work through its the stated action plan and continue to promote jazz to parliamentarians and Government alike.”



Chi Onwurah MP
Chair of APPJG



Lord Mann
Co-chair of APPJG

Foreword

“The Culture, Media, and Sport Select Committee is dedicated to supporting the creative and cultural industries that enrich our national identity and economy. Our role is to scrutinise government policy and advocate for the arts, ensuring these sectors receive the attention and investment they need to thrive in an ever-changing world.

Jazz music is one of the UK’s most dynamic and historically significant art forms. Yet, like many creative industries, it faces considerable challenges. The impact of the pandemic, the consequences of Brexit, and the rapid evolution of technology have fundamentally reshaped the landscape for musicians, audiences, and promoters alike. This report highlights the enduring difficulties faced by jazz music, while also amplifying the voices of those who are working tirelessly to adapt and innovate in this space.

*This review provides **an actionable roadmap** for ensuring jazz music continues to flourish by laying out practical recommendations to address some of the key challenges facing the sector, from fostering collaboration through national planning to tackling the inequalities in streaming revenues.*

It is critical that the Government, alongside funding bodies and industry leaders, looks at these challenges. By supporting grassroots venues, enhancing funding opportunities, and addressing the structural challenges faced by musicians, we can create a more resilient and vibrant future for jazz in England.

I remain committed to advocating for policies that sustain and enhance the UK’s cultural sector. Jazz is a reflection of our society - diverse, inventive, and resilient. Its future depends on bold and collaborative action, and it is our shared responsibility to ensure its prosperity for generations to come.”



Caroline Dinenage MP
Chair of Culture, Media and Sport Committee

Executive Summary

The 2025 *Review of Jazz in England: an Honest Portrait and an Actionable Roadmap* is a comprehensive analysis commissioned by the All-Party Parliamentary Jazz Group (APPJG), undertaken with and by stakeholders in the jazz community, to assess the current state of jazz in England and propose effective future action. The report highlights the country's ever vibrant and resourceful jazz community while identifying critical challenges and opportunities.

Although jazz in England is grossly under-resourced and under-valued it has always and continues to exceed all expectations.

The purpose of this Green Paper is twofold:

- 1) to present an honest portrait of Jazz in England in 2025, derived from the survey responses that have informed this review,
- 2) to present an action plan for the APPJG and suggested actions for the jazz community that tackles the most urgent, practical actions that will enhance the provision and contribution of jazz to the country's cultural and creative economy.

Key Findings: where we are now

1. Cultural and Economic Importance:

- Jazz in England contributes significantly to our thriving creative and cultural industries and our night-time economies, with dynamic and active jazz scenes evident in all major cities in the UK, as well as a thriving jazz festival culture taking place across the whole country, all testifying to jazz's enduring ability to appeal audiences across the board
- Jazz in England as a musical genre and a taught vocation consistently outperforms its level of investment. It is innovative and inclusive by nature, embodying a culture of excellence among its world-leading composers and musicians in spite of being under-prioritised by successive governments.

2. Challenges:

- Jazz performance receives only 2% of Arts Council England's overall funding allocation for live music compared to opera which receives 49%.
- Jazz venues are getting to grips with a noticeable split in audience age profile and reduced attendance figures at live gigs compared to before Covid.
- Jazz promotion is largely volunteer-based and it is becoming increasingly difficult to sustain vulnerable but valued grassroots jazz venues.
- Jazz touring opportunities have been severely reduced post Brexit, which effectively ended UK musicians being able to play in Europe.
- Jazz artists are poorly remunerated for their work by the music streaming platforms, an exploitative trend which is sent to continue given the growth of AI, unless policies are put in place to deal with this.
- There are now more disabled people post-COVID and more people are disabled due to an ageing population. Current statistic shows that 24% ¹ of people the UK are disabled (largely due to an [aging population and upcoming dementia crisis](#)) and no one has thought to directly market to this richest slice of society yet.

3. Strengths and Opportunities:

- Successful educational initiatives like Tomorrow's Warriors and the National Youth Jazz Orchestra continue to nurture and showcase young talent.
- Successful programmes such as privately-funded Jazz Re:freshed has championed UK jazz internationally since 2013.
- The resilient English jazz scene is continually diversifying and engaging new audiences, particularly from younger and multicultural demographics.

¹ [House of Lords](#)

- Jazz venues, having survived the pandemic, have proved to be strong contributors to the night-time economy of the UK, and could help address the current downturn in evening nights out among all age groups.

4. Policy Recommendations:

- The Arts Council England should introduce separate art form policies to ensure a fairer portion of the overall funding allocation is earmarked for jazz and the Department for Culture Media and Sport (DCMS) should also review the provisions of the Live Music Act (2012) to further reduce licencing restrictions.
- Arts Council England should increase the proportion of National Lottery Project Grants given to small grassroots venues and freelance bands and musicians. The concept of “additionality” in lottery funding must be rigorously enforced.
- UK Export Finance(UKEF) and the Department for Business and Trade (DBT) should put in place measures to support musicians wishing to tour in the European Union (EU) by reducing red tape, dealing with secondary ticket sales, funding a stand at Jazzahead!, and enhancing export office initiatives
- Department for Education (DfE) should ensure jazz and improvised music occupies a more prominent position in music education and music education policy in the UK. and advocate stronger business and marketing skills for jazz students in music education, particularly given the rise of AI.
- Streaming needs to be fixed with some urgency so the musicians and bands are properly remunerated. The adverse impact of AI and algorithm-based streaming services on working musicians needs to be fixed and legislated against and with adequate provisions to ensure fair pay and safeguard livelihoods.
- With an ageing population a concerted effort must be made to improve access at jazz venue

Action Plan:

The APPJG recommends:

- Holding regular national planning meetings to include key stakeholders to facilitate the coordinated growth of jazz in England.
- Lobbying vocally and consistently to ensure equitable streaming revenue distribution for jazz music.
- Prioritising grassroots jazz venues and organisations to ensure they receive adequate funding and training for young jazz promoters.
- Collaborating with a range of organisations like The Ivors Academy, UK Music, Music Venues Trust and North Point Strategy to achieve fairer funding, remuneration and touring opportunities for musicians.
- That sufficient lottery funds are available to individuals, organisations and grass roots venues who do not have National Portfolio Organisation (NPO) status with a simplified entry programme.
- Art Form Policies - promulgate a shift in policy that ensures Arts Council England formulates costed art form policies for music, dance, drama etc. - with impact analysis
- That red tape impeding UK musicians from working in Europe is faced with a fair and simple system – this should also apply to EU musician who want to tour the UK – a two way street with no restrictions.
- The crucial point is that the UK jazz scene is not joined up. People are busy with noses to the grindstone in a hostile funding environment. It is crucial that the jazz community comes together to plot their own course and destiny for mutual benefit. APPJG will play its part with its partners in trying to solve the issues set out in its action plan and the jazz community has to play its part with national planning meetings and an effective action plan. There is not much new under the sun so united we stand or divided we fall

2035 Vision: where we want to be

Ten years on, having survived the cultural and economic impacts of Brexit and the pandemic, take a look around cities across England and you will be amazed: pubs, jazz clubs and music venues are driving a renaissance of the night-time music scene, returning British music to its world-leading role.

Festival and events programmes brimming with an exciting mix of national touring talent as well as unique collaborations with leading international players. English jazz promoters, labels and recording studios are experiencing significant growth and are attracting inward investment simply because they offer the best place in the world to produce and release new music. Meanwhile, English jazz education has redefined the remit of the jazz musician, producing capable young leaders who are not just engaging diverse new audiences but are also harnessing the power of new technology to compose, market and distribute their work as well as regenerating communities through stimulating grassroots projects.

This cultural regeneration has only come about because Government acted on the advice of APPJG and made a handful of small but significant changes to policy back in 2025, recognising the specific needs of different music art forms, removing barriers to success and rebalancing funding formulae. It's a model that's now being adopted in other countries across Europe, keen to emulate the UK.

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Review of Jazz in England: an Honest Portrait and an Actionable Roadmap

1. Introduction

As an art form with a long and distinguished history, blessed with passionate, state of the art participants and a thriving country-wide live music scene, with some additional support and funding, jazz is well placed to serve as one of the key engines for growth in England, which would serve to champion the Chancellor Rachel Reeves' stated intention:

*"to build growth on strong and secure foundations
built on stability, investment and reform"²*

The 2025 *Review of Jazz in England: an Honest Portrait and an Actionable Roadmap* is a comprehensive analysis commissioned by the All-Party Parliamentary Jazz Group (APPJG), undertaken by stakeholders in the jazz community, to assess the current state of jazz in England and propose effective future action. This report highlights the country's ever vibrant and resourceful jazz community while identifying critical challenges and opportunities.

While jazz in England (and indeed across the whole UK) more than earns its keep, being abundantly rich in talent, innovation, creativity, enthusiasm and sheer commitment, there is plenty of scope for improved investment and growth. Everyone involved – including jazz musicians, composers, volunteer promoters, audiences, commercial promoters, educators, youth orchestras, jazz festivals – works very hard, however resources are increasingly scarce, making it crucially important that the jazz scene is operating shrewdly, determinedly and is tactically 'joined up' on all fronts, so that this incredibly vibrant and resourceful creative and cultural industry continues to develop, drive ambition and deliver results.

While existing policies and legislation aimed at helping jazz in England, such as Arts Council England's National Portfolio Organisations, the Live Music Act (2012), and recent Government responses to the issue of Grassroots Music Venues, have cut back on red tape and acknowledge the need for reform and new initiatives to support jazz, key elements of the jazz service economy, including its archives and learning resources, remain at risk, including the livelihood and viability of the average jazz musician working in England.

The purpose of this Green Paper is twofold:

- 1) to present an honest portrait of Jazz in England in 2025, derived from the survey responses that have informed this review,
- 2) to present an actionable roadmap, mapping out the most urgent, practical actions that will positively enhance the provision and contribution of jazz to the country's cultural and creative economy.

² <https://www.gov.uk/government/news/chancellor-unveils-a-new-era-for-economic-growth>

2. Background context

The music industry in general has been severely affected by the global pandemic (Covid 2021/22) and the austerity measures that resulted from it, by the impact of Brexit (from 2020), and how technology is changing the way audiences purchase and enjoy music.

Some would say that jazz music has suffered disproportionately in these respects over a long period. And the funding system has not been especially kind to jazz.

In 1973 Ian Carr in “Music Outside” wrote:

*“It is not the fault of the music: contemporary British jazz is in a remarkably healthy position. So many exceptionally gifted musicians are involved in it that there is more variety of conception and more sheer originality than ever before. And yet, though the rest of the world has been quick to recognise the new vitality of the British contribution, the British public and the cultural establishmentremain almost entirely unaware of its international significance”.*³

In a debate on arts funding on the 8th February 2000 Kelvin Hopkins concluded:

*“I must conclude, but I would like to say more about jazz in other spheres, such as education and the media, and the need to make jazz more available to all from a young age. Appreciation of all arts depends to some extent on early familiarity. Britain is an intensely musical nation, bursting with talent, and in jazz we are second only to the USA. We have produced many world-class musicians as well as millions of discerning listeners. We have a proud jazz tradition and stunningly good young musicians, but jazz needs and deserves more support from Government”*⁴.

50 years later after Ian Carr and 24 years after Kelvin Hopkins, Jamie Cullum on the Today Programme on Radio 4 on the morning after Mercury Awards on 8th September 2023 summed the Ezra Collective’s Award.

“I think Ezra Collective’s album was a brilliant album this year is a really exciting moment to spotlight what’s been happening in British jazz over the last 10 years or so sometimes it takes a while for the press to catch up I think the Ezra Collective represents something uniquely British about jazz in the sense that they’re not bound by the immediate American history of jazz, but can infuse it [the music] with what makes Britain so interesting, which is the number of cultures that have come to this country and made it the beautiful place that it is”

Leslie East OBE, BMus, MMus, FGS, Hon.RCM commented on the state of jazz in the UK to the review of jazz in England (November 2024)

“There is no doubt in my mind that jazz is undervalued within the cultural life of this country. The underestimate of the value of jazz is reflected in many ways – in funding of course in comparison with other music genres but also in how jazz is recognised and jazz musicians are rewarded. As an enthusiastic follower of jazz for many years and, more pertinently, as one of the founders of the postgraduate Jazz Course at the Guildhall School of Music exactly 40 years ago, I have always been in awe of the musicianship of jazz musicians. Many have the reading skills and instrumental technical abilities of their classical counterparts but, to me, they have something significantly extra and different. That is the ability to memorise hundreds of ‘charts’ and to improvise on the often extremely complex harmonic sequences those charts contain.

Jazz in England is grossly under-resourced and under-valued:

- a) objectively by comparison with other art-forms, especially Western classical music and opera, and*
- b) by international comparison with countries such as Germany & Scandinavia.*

Some say that the audience for jazz is not big enough to warrant more attention from funding bodies and media such as the BBC. However, in my view, popularity and understanding comes from exposure and promotion, witness the success of Ezra Collective. In the professional jazz community, we have some of the most outstanding creative musicians in the UK. Our conservatoires and youth jazz orchestras are finding and developing exceptional talent among young people who have taken to jazz

³ Ian Carr. Music Outside. Northway Publications 2008. pviii

⁴ Kelvin Hopkins MP debate on jazz at [Westminster Hall 8th February 2000](#)

as their primary art form. These communities deserve more support, more investment and more recognition”.

Professor Andrew Pinnock in “Funding The Arts” sums up the situation:

“Funding – the act of handing out money – creates expectations (more money further down the line), of which later generations of funder have to take account when making allocation decisions. Large highly prestigious arts organisations which have come to depend on funding over decades will fight back and fight dirty if talk of funding system reform seems to threaten their privileges. Funding has, consequences, in other words, not all of them benign. Funding system inertia, together with the power of vested interests, makes change for the better very difficult to bring about”.⁵

Underpinning this entire document is the fact that jazz in England (and indeed across the UK) is rich beyond the dreams of avarice in terms of human resources. It occupies jazz musicians, composers, volunteer promoters, audiences, commercial promoters, educators, youth orchestras, jazz festivals, Arts Council England funded jazz National Portfolio Organisations, a growing service economy and jazz archives. But there is plenty of room for improved investment and growth. Everyone is working very hard, and resources are scarce which makes it crucially important the UK jazz scene is ‘joined up’, in a spirit of co-operation and discovery, so that the incredibly vibrant, resourceful and exciting jazz scene is promoted at every level.

Jazz is rather like Alice in ‘Through the Looking Glass and What I Found There’ – “The rule is, jam tomorrow and jam yesterday, but never jam today”.

The response from the “establishment” will invariably be that jazz has done well so far, so why does it need the funding? The answer is that jazz has always punched above its weight and with additional support and funding could provide one of the engines for growth that is the present governments stated intention, *“to build growth on strong and secure foundations built on stability, investment and reform”⁶*

The purpose of this review is both to highlight those long-standing issues using existing research, and to present the results of a survey, conducted as part of the review of jazz in England, that sought to identify the most important issues - as perceived by those most in touch with the provision and enjoyment of jazz.

2.1 Summary

Please see [Appendix 11](#) for the background to the Review of Jazz in England, approach and methodology.

Jazz is extremely adaptable to change. Since sending out the original survey we are mindful of shifts in the jazz industry, the wider music business, technology and of course local, regional and national economies. We asked if anything had changed significantly in the way the respondents worked.

The follow-up questionnaire shows: 51% of the respondents have seen the changes and it has affected the way they operate. 42% have introduced new strategies, with 21% more dependent on commercial income. 64% have learned new skills and 70% have increased their use of new media with 42% evolving new products and services.

Section 3 of the review, Kevin Legendre looks at the current UK jazz scene who finds it in good health. This reinforces the point made in ‘Cold Comfort and Home Truths’

“..... the music always reinvents itself at regular intervals. Jazz in the UK has survived the vicissitudes of changing fads and fashions in music and will continue to do so”.⁷

Section 4 presents an example of a volunteer jazz promoter – LeedsJazz, that highlights the need for:

“..... successors to the current generation of volunteer promoters willing and able to take the music forward”.

Section 5 examine ways of supporting the Review of Jazz in England including the need for art form policies and the Labour Governments arts policy and growing the arts

⁵ Andrew Pinnock. Funding The Arts – Politics, Economics and Their Interplay in Public Policy. Pub. Routledge 2024 p33

⁶ <https://www.gov.uk/government/news/chancellor-unveils-a-new-era-for-economic-growth>

⁷ [Cold Comfort And Home Truths](#) P11, 2019

Section 6 is the draft action plan. The All Party Parliamentary Jazz Group will be working with a number of partners to help deliver its actions: UK Music, Grass Roots Venue Trust, The Ivors Academy, NorthPoint Strategy, Andrew Lansley and the Jazz in Education Initiative. In summary, the key actions are:

- The lack of Art Form policies has manifested itself in many ways: in the problem that arose concerning opera in the last National Portfolio funding round. It is crucial that the funding system develops Art Form policies, separately, for music, theatre, dance, etc. and funding decisions should be guided by these policies.
- Arts Council England's Lottery Project Grant Scheme requires an overhaul to make it fit for purpose. The current use of lottery funds to support the growth of National Portfolio Organisations needs urgent attention to redress the imbalance by restoring adequate levels of funding to the National Lottery Project Grants Scheme. (Please see appendices 3 and 4)
- Ensure that the Arts Council England's Supporting Grass Roots Music programme is focussed on grass roots music venues instead of broadening the scope, and thereby diluting the crucial need to fund grass roots venues.
- Grass Roots Music Venues - Ensuring jazz promoters and small-scale venues are supported and that new promoters are encouraged and trained.
- Working to reduce the red tape which stifles jazz touring in the EU.
- Working to fix the inequalities in jazz musicians' earnings from streaming.
- Artificial Intelligence (AI) - the speed of technical development requires monitoring as it has already outstripped legislative frameworks to respond effectively.
- Responding to the new Government's mission for growth.
- Currently jazz organisations and individuals - players, composers, promoters, educators, festival-organisers, reporters and archivists work incredibly hard to promote UK jazz at home and abroad. Annual planning meeting, of the key interests, would prove to be of immense benefit in ensuring the UK jazz scene works together on major initiatives such as ensuring a UK marketing initiative home and abroad and encouraging a new generation of promoters.

Section 7 are the Appendices which include a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis of the results of the questionnaires (Appendix 1) and a PESTEL Analysis that looks at the wider environmental factors that affects jazz (Appendix 2).

Appendix 3 analyses applications to National Lottery Project Grants (NLPG) 2016 to 2023 gleaned from Arts Council England documents and freedom of Information Inquiries.

- Table 1: from 2012 to 2016 the average success rate for jazz awards against all music applications was 4.4%.
- Table 2: from 2018 to 2023 the average success rate of jazz awards, as a percentage of all total eligible applications, was 1.2%.
- Table 3: the success rate of Jazz applications to the Supporting Grass Roots Live Music Fund 2022/23 was 2%.

Appendix 4 looks at Arts Council England and the growth of National Portfolio Organisations in relation to lottery funding.

There has been a 49% increase in the numbers of NPOs since 2015. The subvention from the DCMS has been supplemented by lottery funds.

The core concept of "additionality" appears to have been diluted and the lines have become increasingly blurred at the expense of the musician, band, dancer, touring theatre and so forth applying for National Lottery Project Grants.

For the avoidance of doubt in the Arts Council England's last funding round for the year 2023/2024, 49% of the music allocation went to opera, 24% to classical music, 0.40% to folk music, 0.50% to brass bands and 2% to jazz.

Appendix 5 - jazz and education. Over 11 years, 2012 to 2022, the number of acceptances of female jazz students at British conservatoires has never gone beyond 20. With regard to business education on music courses, there needs to be greater emphasis on business/marketing skills for those undertaking jazz degree courses.

Teacher Training - Perhaps a new model is required. For example, the Royal College of Dance, which exists primarily to train dance teachers also trains them to a high level as dancers. There's nothing quite like this (certainly at undergrad level) in music

Appendix 6 analyses the audience for jazz

There are two different kinds of audience, with different outlooks on, and expectations of, the jazz genre. The first audience is a predominantly older demographic listening to jazz in a wide variety of venues often those of volunteer promoters. The second audience is a young, diverse audience.

The remaining appendices are the results and analysis of the review of jazz questionnaires. The audiences (Appendix 7), musicians (Appendix 8), promoters and venues (Appendix 9) and people and organisations who made submissions (Appendix 10).

Jazz music in England is at a junction, and the future prosperity of the genre is dependent on the decisions and actions that will be taken by everyone involved.

3 Invention and reinvention - Kevin Legendre

British journalist, broadcaster and author Kevin Legendre presents a nuanced take on the current UK jazz scene, in which he characterises the ability of jazz music to reinvent itself and survive.

3.1 Introduction

As Carr said in 1973 and the same could be said now, *"It is not the fault of the music: contemporary British jazz is in a remarkably healthy position"*⁸ In a Parliamentary debate in 2000 Kelvin Hopkins MP noted, *"Britain is an intensely musical nation, bursting with talent, and in jazz we are second only to the USA"*.⁹

Humphrey Lyttelton summed up the phenomena of invention and reinvention of jazz:

*"Jazz is like a rock pool. When the tides of musical fashion come in the rock-pool is hidden for a while. But when the tides go out, there's the rock-pool again, brimming with life and activity."*¹⁰

Eric Hobsbawm in 'Uncommon People' reinforces this message:

*"Jazz has shown extraordinary powers of survival and self-renewal in a society not designed for it."*¹¹

Kevin Legendre highlights the fact that jazz, the music, in Britain is in "rude health", as it was in 1973 and in 2000. Jazz always overcomes the odds and defies expectations yet despite this track record jazz is still undervalued within the cultural life of this country.

3.2 Invention and reinvention - Kevin Legendre

The British jazz scene is in rude health. Rather than being centred on one town or city it has rich seedbeds of talent all over the United Kingdom. Brighton, Bristol, Cardiff, Glasgow, Leeds, London, Manchester, Wakefield, Belfast and Newcastle are key hubs for artists old and new, yet it comes as no surprise when an artist from Cornwall or the Isle Of Wight makes a breakthrough, primarily because of the increased availability of the music, which is enhanced by expanding digital culture and consolidated by both festivals and educational institutions. Many accomplished musicians teach at leading colleges. New generations of players are being taught by those who know practice and theory.

⁸ Ibid 1

⁹ Ibid 2

¹⁰ Chris Hodgkins. Cold Comfort And Home Truths. 2019 p11

¹¹ Eric Hobsbawm, Uncommon People, Resistance, Rebellion and Jazz (Liedenfield and Nicholson. 1998) pp291-292

Furthermore, organizations that are community-minded, offering workshops to those in their teenage years, the opportune moment of exposure, are making a decisive impact on emerging talent. Tomorrow's Warriors, Kinetika Bloco and the Julian Joseph Jazz Academy all play essential mentorship roles while promoters and agencies such as Jazz Re:refreshed, Jazz North and ECN are actively helping musicians to launch careers through a range of recording, performing and touring opportunities. This audience development takes place at grass roots level, often in small venues or on artist-led scenes that speak very much of an ongoing commitment to jazz, regardless of the limited investment if not a total absence of support by funding organizations.

Most interestingly, jazz is a reflection of the diversity of Britain today. Many groups are multi-cultural and many scenes have a healthy gender balance. And British jazz runs across generations. The veterans include such as Elaine Delmar, Norma Winstone, Paul Dunmall, Evan Parker and Louis Moholo-Moholo while the new stars include Nubya Garcia, Cassie Kinoshi, Kokoroko, Sultan Stevenson, Asha Parkinson, Emma Rawicz, Jacob Collier, Kit Downes and Luke Bacchus. Among those who fall somewhere in the middle are Julian Joseph, Nikki Yeoh, Django Bates, Iain Ballamy, Nikki Iles, Orphy Robinson, Claude Deppa, Mark Lockheart, Tim Garland, Shabaka Hutchings, Alexander Hawkins, Wendy Kirkland, Alison Rayner, Deirdre Cartwright and Dennis Rollins, to name but some. Together the above reinforce the adage that jazz is a broad church rather than a single genre, and its language has many vocabularies, from swing to avant-garde to Latin jazz and fusion, all of which are evolving as the latest practitioners come to the fold. The music is based on invention and reinvention.

The triumph of Ezra Collective at last year's Mercury Music Prize marked a significant moment for British jazz. This was the first time an artist committed to improvisation and high standards of artistry had won the much-coveted accolade, years after the likes of Courtney Pine, Denys Baptiste, Soweto Kinch, Sons Of Kemet and Zoe Rahman had all been nominated. It was proof positive that Ezra Collective's approach to jazz, which incorporates hip-hop, afrobeat, electronica and salsa, among other elements, has clearly struck a chord with young audiences, as can be seen by the huge demand for the band on the national and international festival circuit. Ezra's victory raised the profile of British jazz far beyond what it had been in the past two decades and made the point that, rather than being an exclusive, esoteric and forbidding genre, the music is also inclusive, and celebratory. There are other jazz artists who have a different slant, playing very abstract music, but Ezra's ability to create a sense of joy and make large numbers of people dance is an integral part of the history of jazz, that also provides an open door, an entry point for new listeners.

As it stands, the current British jazz scene is both a reflection and enrichment of British society. Any nation that is predicated on values such as equality, solidarity and opportunity for all regardless of their class, race or gender, could look to the music as a space where these principles are largely upheld. Culture has long been one of the most valuable and empowering ways of representing any country, and while it is widely accepted that pop is one of the UK's key export industries, above all because of its net worth, one can also argue that jazz should be seen as a great source of national pride. First and foremost, it provides a vital means of expression for artists, who can pass comment on whatever subject they choose, both explicitly and implicitly, through vocal and instrumental composition. This scope of possibilities makes jazz truly exciting and relevant to any contemporary society that seeks debate and an exchange of ideas as well as great artistry. It would be foolhardy to contend that this inspirational form of music, fuelled by courageous individuality and generous collective energy, is a panacea, but there is no doubt that it has made a priceless contribution to the lives of millions and will continue to do so for years to come.

4 JazzLeeds – A Promoter’s Story

A recent account of an active volunteer jazz promoter, highlighting the need for willing successors able to take the music forward.

A lot can be learnt from the very distinctive regional scenes in England for example in Leeds Birmingham, Bristol, Manchester and nations - such as the success of Jazz in Scotland. Each has different strengths and needs.

Leeds is a really good example. The city is producing individual music of the highest quality performed by young bands – like Emma Johnson’s Gravy Boat, Jasmine Myras’ groups, Fergus Quill’s Imaginary Big Band, Vipertime, Wandering Monster. It has a wide range of commercial promoters that promote jazz as part of their programme – SuperFrendz/Wardrobe, Belgrave, DJ Lubi, Sela, Domino Club, Brudenell, several volunteer promoters including JazzLeeds and also places like Heart and ChapelFM, publicly funded arts organisations such as Howard Assembly Room, Leeds Conservatoire and lots of DIY approaches such as Hyde Park Book Club, ATA records, Leeds Jazz Festival, not to mention as a couple of classic jazz clubs, and some interesting educational approaches in local schools.

The experience at JazzLeeds is that their overall audience for jazz has increased over the years they have been running. They topped 8000 ticket sales for the first time last year, and that was before taking into account the audiences at the two festivals they support. The audience is more diverse than it was, and is more open to try different types of music. They find jazz audiences in Leeds tend to be loyal to one particular venue rather than to a band or type of music – people enjoy experiencing music with friends in a familiar setting. This social element is absolutely vital - how welcoming, and how safe, venues are. JazzLeeds are lucky to be part of a big city like Leeds and in an attractive venue and good location.

The most significant shift in audience attendance and profile is that there are now two largely separate audiences for jazz– one with an ageing demographic supporting largely mainstream and modern jazz, and a young multicultural audience whose focus is on new contemporary jazz and music of mixed genre. Competition has also undoubtedly increased -there are now a variety of types of organisations in Leeds offering jazz and all the music it touches, and is touched by.

The challenge for JazzLeeds as a jazz promoter is to work out how to survive and thrive in this very different landscape. They have had to adapt, to develop newer approaches than just the “standard jazz gig”. JazzLeeds now puts on jazz at a variety of times in the day, with all sorts of types of music and pricing levels. They offer education events, community events and chances for people to join in.

The overall problem for independent volunteer run organisations like JazzLeeds is finding people who are prepared to put the time into running and supporting their activities week in and week out. Money isn’t the main problem and the quality of music being made is superb. Money is a problem for most jazz venues, but it is not the only one. What is needed are successors to the current generation of volunteer promoters willing and able to take the music forward.

5 Supporting the Review of Jazz In England

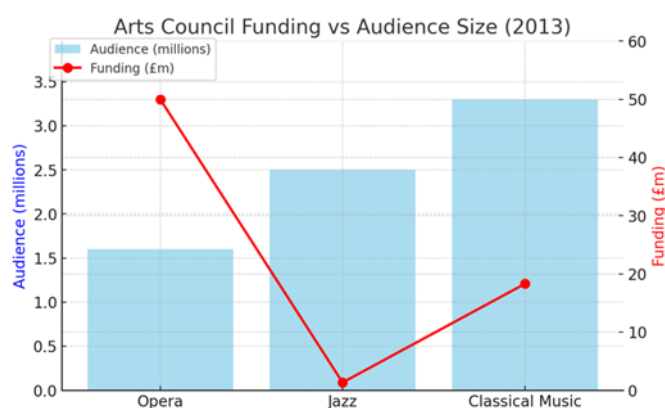
Building a sound case for greater levels of support, fairer funding distribution and effective strategies to tackling AI and streaming.

5.1 Jazz funding vs audience disparities proves need for separate art form policies

Arts Council England abandoned art form policies in the first funding round under the new National Portfolio Organisation system took place in 2011 for the period 2012/2015.

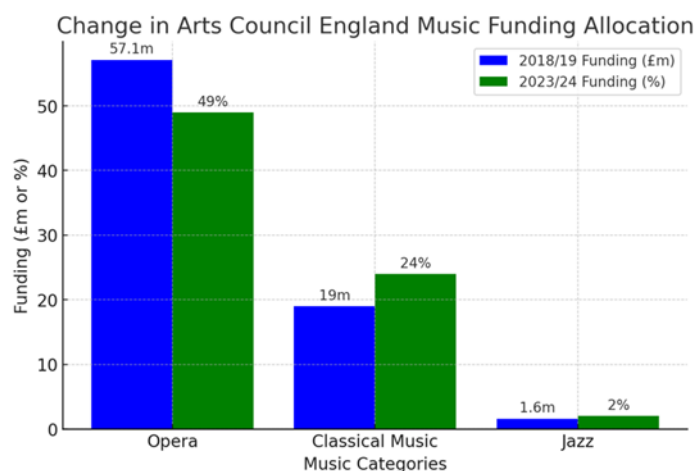
“Jazz Services has always said that we are not in the business of robbing Bryn Terfel to pay Courtney Pine, but we did say that the selection of the national portfolio organisations was a missed opportunity to reshape the landscape for the arts. The solution is a national policy for music that is collectively owned by all parties involved”.¹²

In 2013 the audience for opera in England is 1.6 million people; for jazz 2.5 million and for classical music 3.3 million. Total Arts Council funding for opera in England in 2012-13 is about £50m, for classical music £18.3m and for jazz £1.35m.



In the funding round 2016/2019 in 2018/19, opera received £57.1m, of which 32.5% was spent outside London. Classical music received £19m of which 55% was allocated to the English regions, and jazz received a total of £1.6m, of which 30% was spent outside London; 3.4 million people attend classical music concerts, 2.1 million attend jazz concerts and 1.7 million attend opera.¹³

For the avoidance of doubt in the Arts Council England's last funding round for the year 2023/2024, 49% of the music allocation went to opera, 24% to classical music, 0.40% to folk music, 0.50% to brass bands and 2% to jazz.



¹² Chris Hodgkins, Arts funding, opera and all that jazz (The Guardian, Letters, 19 January 2013, available at: <http://bit.ly/2mSnVgg>, accessed 18th July 2018)

¹³ Chris Hodgkins, Stepping up for the homeless at opera (The Guardian, Letters, 24th March 2018, available at: <http://bit.ly/2l5Auy0>, accessed 18th July 2018)

There has been little change over the years and funding has been distributed under the bounded rationality of the past. It is crucial that separate art form policies are developed to ensure an equitable distribution of funds. Jazz in England would be best served, as would all art forms, but not having to fight for a larger slice of a finite pie, rather to make a strong case for the overall pot to be increased.

5.2 Jazz well-placed to fly the flag for Government arts policy and growing the arts

Jazz is a well-established component of the music industry in the UK, and its high levels of existing productivity and ingenuity make it well-placed to deliver on the new Labour Government's arts policy. However there is work to be done to ensure that jazz finds a place in the sun and a great deal of work to be done to address the Labour Government's arts policy [“Creating Growth: Labour's Plan for the Arts, Culture and Creative Industries”](#), which states:

“Backing the industries in which we are already world-leading to bring growth, good jobs and improved productivity to every part of the country is how we will achieve our defining economic mission for government – the highest sustained growth in the G7.”¹⁴

This action plan and future actions need to result in growth. [The Labour Party Manifesto](#) is crystal clear in its aims to kickstart economic growth and to secure the highest sustained growth in the G7

In a recent article in Arts Professional Lisa Nandy set out priorities as Culture Secretary:

- *The new government's focus will be on respecting the contribution that people in different areas of the country have to make, rather than redistribution.*
- *“We have to put people back at the centre of their own story,” She is already working “to get more of our art, culture, heritage from every part of the country reflected in our national story*
- The Culture Secretary said some of her priorities for the Arts and Culture sector include supporting theatre, tackling the [disappearance of music venues](#) and a [Brexit deal for touring musicians](#)¹⁵

But we are warned, we should not expect public subsidy bail outs. Growth will come from the creation of a private finance model or models:

“...to attract more funding from different sources into arts organisations and put them on a more sustainable footing”.¹⁶

Add to this The latest [National Lottery Distribution Fund \(NLDF\) report](#) from the Department of Culture, Media and Sport (DCMS) reveals that the share of income awarded to the arts in 2023-24 was £347m, down from £358m the previous year. (See appendices 3 and 4).

The Campaign for the Arts' report [The State Of The Arts](#) paints a grim picture.

5.3 Jazz can kick-start growth, provides an excellent return on investment and has the power to break down barriers to opportunity.

Jazz delivers at the box office, and jazz venues and promoters have been particularly effective at developing their business models and range of services in recent years.

- For example, the review of jazz promoters' research revealed that 79% of income comes from the box office. In 2018/19, for the City of Birmingham Symphony Orchestra, only 47% of income came from box office and engagements. In 2022/23 the figure was 43%¹⁷ The Royal Opera House income from box office was 33% in 2018/19¹⁸ and box income for 2022/23 accounted for 31% of total income¹⁹

¹⁴ Creating Growth: Labour's Plan for the Arts, Culture and Creative Industries. P5

¹⁵ <https://www.artsprofessional.co.uk/news/nandy-sets-out-priorities-culture-secretary> 18th July 2024

¹⁶ Ibid., 1 p7

¹⁷ City of Birmingham Symphony Orchestra Annual Report and Financial Statements for the year ended 31 March 2023 p31-32

¹⁸ The Royal Opera House Annual Report 22018/19 p3

¹⁹ [Civil Society](#)

- Evidencing this strength and the need for a good return on investment, 51% of the respondents to the jazz in England questionnaire have seen the changes in their business environment and it has affected the way they operate. 42% have introduced new strategies, with 21% more dependent on commercial income. 64% have learned new skills and 70% have increased their use of new media with 42% evolving new products and services. (Please see appendix 11.1 - follow up questionnaire).
- The Arts Council England is slowly shifting its stance with the funding of Jazz National Portfolio Organisations rising from £1.6 million in 2015/16 to in £1.7 million in 2018/19 to £1.9million in 2022/2023 – is an 18.75% increase.
- Back in 2017, Jazz Re:freshed launched their ‘Outernational’ Programme with support from Arts Council England and a PRS Foundation-funded an initiative that aims to put a global spotlight on the UK jazz scene. Partnering with British Underground, whose specialism is international showcasing, they delivered showcases UK bands and musicians at SXSW Austin, Texas, AFROPUNK New York and Paris, SIM Sao Paulo, AZZ IS festival, LA with independent shows in New York, Rio, New Orleans and many other locations

The Jazz Re:freshed Outernational Programme is a fine example of cooperation and discovery of new ways of working. Jazz is extremely adaptable to change, and with the shifts in the jazz industry and the wider economy, the music is rising to the challenge. Some further examples follow:

- [Guildford Jazz](#) secured an Arts Council grant to run BEAT: a series of gigs and workshops designed to introduce a younger audience to the jazz scene. Guildford Jazz continues to sell out almost all their regular gigs. Their “Beat” gigs, to attract a younger audience, now continue without ACE subsidy and a festival is planned for the Autumn.
- Manchester Jazz Festival has been running since 1996. In the 2023 festival 23,000 people attended free or ticketed events which was a 25% increase on the previous year²⁰. Their website contains a useful [guide to jazz](#) designed to demystify jazz to new audiences of any age.
- The 2023 Glasgow Jazz Festival enjoyed a successful return to form for their 37th year. The festival, saw record high ticket sales which were up 54% on last year including 3 sold out shows.²¹
- The National Youth Jazz Orchestra has increased its support from trusts and foundations from £119k in 2022 to £135k in 2023 to £185k in 2024. It’s Legacy Club has secured a legacy of £1.1million. ²²
- Established in 2016, the Jazz Centre UK is another ambitious volunteer-led organisation, based in the City of Southend on Sea. Its goal is to create a cultural centre of excellence for jazz education, outreach, and performance in the UK. It has made real progress in 2024, achieving a 15-year lease agreement for its museum, media centre, and live music venue. Ticket sales for its weekly music programme have grown steadily from just under one thousand in 21/22 to nearly two thousand in 23/24.
- Jamie Cullum on the Today Programme on Radio 4 on the morning after Mercury Awards summed the Ezra Collective’s Award
 - *I think Ezra Collective’s album was a brilliant album this year is a really exciting moment to spotlight what’s been happening in British jazz over the last 10 years or so sometimes it takes a while for the press to catch up..... I think the Ezra Collective represents something uniquely British about jazz in the sense that they’re not bound by the immediate American history of jazz, but can infuse it [the music] with what makes Britain so interesting, which is the number of cultures that have come to this country and made it the beautiful place that it is...*²³

²⁰ Manchester Jazz Festival, Report and Accounts for the year ending 30 June 2023 p2

²¹ Report of the Trustees and Financial Statements for the Year Ended 30 September 2023 for Glasgow International Jazz Festival Limited p3

²² [Charity Commissioner For England And Wales](#)

²³ Jamie Cullum interview, the [Today Programme Radio 4](#) 8th September 2023

5.4 Jazz can demonstrate timeliness and leadership re issues to do with streaming and AI

The All Part Jazz Group is working with The Ivors, to recognise and protect composers writing jazz, classical, sound art, or soundtracks, who are penalised by the current model in streaming where music rights holders are paid after 30 seconds of listening. The 'Economics of Streaming' report found that because of this regular long-form, classical, jazz, and traditional music listeners subsidise the consumption of consumers with popular or mainstream tastes.²⁴

Some streaming services are already amending their models to limit the amount they pay out to 30 second 'white noise' tracks by increasing the time limit or introducing a minimum threshold of annual streams. Streaming services should explore how they can support art forms like jazz by introducing further bonuses for those who are producing long-form compositions and recordings.

5.5 Conclusion

Underpinning this entire document is the fact that jazz in England (and indeed across the UK) is rich beyond the dreams of avarice in terms of human resources. It occupies jazz musicians, composers, volunteer promoters, audiences, commercial promoters, educators, youth orchestras, jazz festivals, Arts Council England funded jazz National Portfolio Organisations, a growing service economy and jazz archives. But there is plenty of room for improved investment and growth. Everyone is working very hard, and resources are scarce which makes it crucially important the UK jazz scene is 'joined up', in a spirit of co-operation and discovery, so that the incredibly vibrant, resourceful and exciting jazz scene is promoted at every level.

The message that the jazz community needs to develop, and to get across, is that jazz is an important music, and an investment that creates growth.

²⁴ House of Commons Digital, Culture, Media and Sport Committee Economics of music streaming Second Report of Session 2021–22 p45

6 Action Plan

The All Party Parliamentary Jazz Group in collaboration with partners UK Music, Grass Roots Venue Trust, The Ivors Academy, NorthPoint Strategy, Andrew Lansley and the Jazz in Education Initiative.

The All-Party Parliamentary Jazz Group has mapped out its actions from 2024 to the end of the Parliamentary term in 2029

The remaining actions and organisations are suggested. The All-Party Parliamentary Jazz Group fervently hopes that progress can be made on these actions in a spirit of cooperation and discovery.

Action 2024/2029	All Party Parliamentary Jazz Group (APPJG) working in partnership
All Party Parliamentary Jazz Group • National Lottery Project Grants Funding - Ensure that sufficient lottery funds are available to individuals, organisations and grass roots venues who do not have National Portfolio Organisation (NPO) status with a simplified entry programme. Please see appendices 3 and 4 • Art Form Policies - promulgate a shift in policy that ensures Arts Council England formulates costed art form policies for music, dance, drama etc. - with impact analysis • Responding to the Department for Business and Trade consultation on secondary ticket sales. • Responding to the DCMS Review of Arts Council England. • Keeping a watchful eye on the media – print, radio, online and new developments such as One Jazz and meetings with the BBC. • Organise the annual All Party Parliamentary Jazz Awards	All Party Parliamentary Jazz Group In the light of the Review of Jazz in England the All-Party Jazz Group, with interested trade bodies, lobbies for a reformation and a fair deal for the jazz constituency in the areas below.
Working in partnership with The Ivors Academy Streaming - Currently revenues are paid out under a pro rata system. A change in the way revenues are distributed, to a user-centric payment system (UCPS) would be far more equitable. Under this model, subscriber revenues are distributed according to what the individual user has spent their time listening to. See APPJG submission to DCMS Committee inquiry into the economics of streaming here The UK Code of Practice on Transparency in Music Streaming. will make it easier for musicians to get access to information about what they're being paid however it won't increase remuneration. • Intellectual property rights	Working in partnership with The Ivors Academy The Ivors Academy is the UK's not-for-profit professional association for composers writing classical, jazz, sound art, or soundtracks are penalised by the current model in streaming where music rightsholders are paid after 30 seconds of listening. The 'Economics of Streaming' report found that because of this regular long-form, classical, jazz, and traditional music listeners subsidise the consumption of consumers with popular or mainstream tastes.
Working in partnership with Music Venues Trust	Working in partnership with Music Venue Trust

Grass Roots Music Venues - Ensuring jazz promoters and small-scale venues are supported and that new promoters are encouraged and trained.	Music Venue Trust is a UK Registered Charity which acts to protect, secure and improve UK Grassroots Music Venues for the benefit of venues, communities and upcoming artists.
Working in Partnership with UK Music to lobby for the following: • Greater engagement and support for the self-employed musicians • EU and red tape– Lobby for further negotiations with the EU and Member States on reducing red tape connected with touring musicians. • A Transitional Fund to help musicians tour the EU under the EU-UK Trade and Cooperation Agreement (TCA) • An Export Office to promote UK music abroad and boost funding to Music Export Growth Scheme (MEGS) and The Performing Right Society Foundation's International Showcase Fund (ISF) • A 5% VAT level for cultural tickets to keep value in the sector. • A 3-year moratorium on Business Rates for music spaces like studios and venues.	Working in Partnership with UK Music UK Music is the collective voice of the UK's world-leading music industry. We represent all sectors of our industry – bringing them together to collaborate, campaign, and champion music.
Working in Partnership with Folded Wing The CEO Karen Pearson advises on media and campaigning	Working in Partnership with Folded Wing Pioneering audio production company Folded Wing bring together different cultures, creatives, brands and audiences with a focus on jazz past, present and future ...
Working in Partnership with NorthPoint Strategy NorthPoint Strategy provides pro-bono strategic advice to the All-Party Parliamentary Jazz Group.	Working in Partnership with NorthPoint Strategy NorthPoint Strategy is an independent political and communications consultancy specialising in public affairs and public relations.
Working in Partnership with Andrew Lansley Artificial Intelligence (AI) - the speed of technical development requires monitoring as it has already outstripped legislative frameworks to respond effectively. • Responding to the open consultation on Copyright and Artificial Intelligence (Intellectual Property Office). Response can be seen here	Working in Partnership with Andrew Lansley Andrew Lansley is Innovation Manager at Cheltenham Festivals and a Senior Academic at the University of Gloucestershire. His work includes research around AI curation and the impacts of AI use within the cultural sector. He has recently presented updates on this work at the Europe Jazz Conference and has been invited to present this research at Jazz Congress 2025, hoping to promote the UK's reputation as an innovator within music and technologies.
Working in Partnership with Professor Andrew Pinnock Advising the All Party Parliamentary Jazz Group (APPJG) on new funding models for the arts	Working in Partnership with Professor Andrew Pinnock Andrew Pinnock worked in Arts Council England's national office for eight years and headed its London regional music unit for four more. He left the funding world for academia in 2005. He is now a professor in the Music

	Department, University of Southampton, teaching and researching cultural policy among other things. His book <i>Funding the Arts: Politics, Economics and Their Interplay in Public Policy</i> was published by Routledge in 2023.
Working in Partnership with Dr Noel Dennis. Advising the APPJG on marketing strategies for the digital age.	Working in partnership with Dr Noel Dennis. In addition to his long career in education, he is a professional jazz musician and uses his experience as an improviser to provide a unique perspective on strategic management and leadership issues. He has gained international recognition for his work in combining these areas and is a prolific author with extensive publications. Noel has taught marketing across all levels in HE and worked with a range of organisations on their strategic marketing planning,
Working in partnership with Dr Zhang He Advising the APPJG on economic matters.	Working in partnership with Dr Zhang He Dr Zhang He is an international macroeconomist with a proven track record in strategic planning and implementing initiatives in teaching and learning. As an effective senior academic and experienced committee chair, Zhang upholds academic quality assurance standards, leads course development, and enforces policies to maintain excellence. Additionally, he spearheads enterprise/commercial research and international development projects, driving impactful outcomes across diverse academic and professional landscapes.
Working in partnership with the Jazz in Education Initiative (JEI) The JEI advises APPJG as to how Jazz and improvised music needs to occupy a more prominent position in music education and music education policy in the UK.	APPJG working in partnership with the Jazz in Education Initiative The Jazz in Education Initiative aims to provide coherent advocacy and contribute expert responses to current educational policy The group is formed from senior figures across all sectors and ages of Jazz in Education: Conservatoires; Teacher Education; Schools; Community Practitioners; Examinations Boards; Universities; Educational Publishing and Curriculum Development. Read their submission and actions Here
Suggested Action 2024/2029`	Suggested organisations and individuals
National Annual Planning Meetings with concrete actions Set up and organise an annual National Planning Meetings Each year a chair and an organization are appointed to conduct business and take the lead • Actions could be a strong organised presence at Jazz Ahead. Seb Scotney of <i>Jazz London News</i> organised a stand in 2024. The jazz community owe him a big thank you and also to	Suggested Organisation: Arts Council England funded National Jazz Portfolio Organisations plus interested organisations from Scotland, Wales, Northern Ireland and Ireland. Jazz Promotion Network, Northern Jazz Promoters plus other interested parties

Emily Saunders of Jazz Connects who organised stands in 2018 and 2019 - but this should have been a national marketing initiative. Nick Brown, the new Client Services Manager at ECN Music, has secured funding from Arts Council England to provide a stand for Jazz Ahead 2025 Developing a narrative that jazz is a great investment that creates growth The strengths and weaknesses in Appendix 1 contain a number of indicators for action.	including funding bodies such as Arts Councils.
National Education Annual Planning Meetings with concrete actions Set up and organise annual National Planning Meetings. Each year a chair and lead organization are appointed to conduct business. Music education hub should be an integral part of the planning meetings. There are now 43 nationally and they hold the purse strings for music education in schools in England. They are DfE's chosen model for supporting music education in English schools The strengths and weaknesses in Appendix 1 contain a number of indicators for action.	Suggested Jazz Education Organisations: Tomorrow's Warriors, National Youth Jazz Orchestra and National Youth Jazz Collective plus all the various youth big bands such as Doncaster Youth Jazz Orchestra, Hot House and interested Music Hubs
Action In Progress	The Jazz Centre UK
The Jazz Centre UK – Five Year Vision Building a nation centre for excellence for jazz education, outreach and performance	The Jazz Centre UK The purpose of The Jazz Centre UK is to promote, preserve and celebrate jazz in all its forms for the benefit of a diverse and growing community. Their five year vision is to become the UK's 'go to' centre that educates, demonstrates, facilitates and helps regenerate jazz by showcase, encourage, research and support all aspects of jazz.

7. Appendices - The Review of Jazz in England report and findings

Appendix 1 – Summarised: SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis of the results of the questionnaires

Audiences

STRENGTHS	WEAKNESSES
• 76% of jazz attendees can be said to be ABC1 social class audience • There are two kinds of audience. The first is predominantly an aging demographic, and the second is young and multicultural. Please see Appendix 6 below. • Baby Boomers and Seniors are turning to YouTube. In fact, seniors are the fastest growing segment on YouTube mobile. As Boomers and seniors continue to be increasingly active online – spending 27 hours per week – marketers need to learn how best to connect with this valuable sector. • There is evidence of an audience overlap of jazz with opera and classical music.	• There are two very different kinds of audience. • The age of respondents means that the longevity of the audience is limited. If this happens, many venues would no longer be viable unless they attract a younger audience or are replaced by younger promoters • The Review of Jazz Survey (ROJS) found that only 31% of respondents are buying tickets from online agencies. • Jazz venues with small audiences charging less than £15 per head will struggle to attract well-known musicians. This failure to keep ticket prices at a reasonable level needs to be addressed. • In terms of the imbalance of gender there are perhaps too few performances by women bands and musicians at live venues, in the media, and on TV. More work needs to be done • More needs to be done in terms of parking, access at venues, staff awareness and the availability of support for disabled people..
OPPORTUNITIES	THREATS
• The audience for live jazz is divided into various camps (Trad / New Orleans / Blues / Swing / Modern / Free Improv / Afrobeat/ the “rising numbers of younger fans sparking a UK jazz renaissance”. We need to create opportunities to bring people together for the general good. Please see Appendix 6 below • There are several campaigns and organisations aimed at saving venues/Nigel Price / Jazz Promotion Network / Music Venue Trust), once again cooperation could produce a stronger voice • There is an audience overlap with jazz and other music and ways must be found to exploit this fact. • Investigate and find concrete ways to connect with audiences online and through social media • Radio was listened to by 78% of the survey, with healthy audiences for the BBC and Jazz FM. However, internet radio seemed to be largely ignored. This could be accounted for by the fact that 61% of the sample did not use a	• With an ageing demographic for many jazz clubs there is a strong probability that jazz clubs will reduce in number, especially among the volunteer jazz promoters. It is crucial to ascertain what will attract young people to existing jazz clubs or what turns them off jazz clubs. • Jazz clubs need to get to grips with access for disabled people. Attitude is Everything calculated that £8.2 million was spent at live music events in 2017/18 by disabled people and their households. • As people age, they become disabled. Access needs to be addressed with urgency.

radio app such as TuneIn or Radio Player. There are any number of internet jazz stations and podcasts available to be heard but if people do not know how to access them an information exercise that proselytises the wealth of jazz online would be helpful.	
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Musicians

STRENGTHS	WEAKNESSES
UK Jazz Musicians are resilient and resourceful, enjoy making music, and do it very well	Considerations are mainly financial: - A low number of successful applications to National Lottery Project Grants 2022/23. Please see Appendix 3 and 4 below - The Projects Grant lottery application is now so cumbersome (even for very small amounts) you almost need to be a funding specialist to be able to get it. It also takes hours/days to apply. It needs reforming into a much simpler form for small grants that wouldn't exclude people who aren't arts administrators / funding specialists. At the moment it is very exclusive - Business training for musicians at college or via professional organisations seems patchy with just under half not having received any such training 57% of musicians attended a Musicians' Union training workshop. 1.3% of the respondents attended a Further Education music course with 46.7 attending a Higher Education music course. 52% of respondents attended no formal music course - In terms of business training at music college: 44.9% said that business training consisted of ad hoc lectures. 20.7% had no training. - With regard to the importance of music business training, respondents were asked if the college stressed the importance of the business module. 22.9% of the respondents said yes with 77.1% saying no. - There is a crucial need for a national standard and curriculum for jazz business training - The effect of Covid has been devastating - About three-quarters of UK musicians have their own website and many use social media. Mainstream media (radio, TV and newspapers) coverage is reducing with most programmes on radio or TV dealing with historical music - Compared with salaries in general and even salaries in the music industry jazz musicians report very low earnings, with only 14% receiving more than £30K. 50% earn less than £15K annually, which is below the poverty line and/or the benefits threshold. - Over 60% of musicians are not saving for a pension - Work in the EU is reducing because of the extra difficulties due to Brexit. 74% of the musician respondents to the survey worked in jazz clubs. It is crucial that small scale and grass roots venues are supported

	Income from streaming (Spotify etc.) is pitiful (less than £100 in total) for all but one or two individuals, while selling CDs at gigs is still the best way of making income from recordings
OPPORTUNITIES	THREATS
- The value of music in general, and jazz in particular, must be recognised by the Government and the Arts Council. - Musicians will have to act together to improve their working conditions, make use of Arts Council initiatives and drive-up prices with the longer-term aim of improving income - Areas of jazz performance that are growing are those that are embracing new genres and styles of playing, predominantly in the London area but also in certain other areas, mainly large cities.	- Low number of successful applications to National Lottery Project Grants 2022/23 Please see Appendix 3 - Lottery funds are being used to fund Arts Council England NPOs (National Portfolio Organisations), which decreases the available funds for musicians, bands etc. (Please see note 2: Arts Council England National Portfolio Organisations and lottery funding) - Freedom of Information Inquiry into lottery funding of NPO's ratio of total number of applications to successful applications was compared to the ratio of non NPO applications to successful applications. The success rate as a percentage against all NPO jazz awards is 100% from 2019/2023. The average success rate for non NPO jazz awards against all music awards for 2018/2023 is 7.3% - Figures from the internationalist campaign group Best for Britain show that on average, the number of British musicians scheduled to take to European stages this summer (2023) has fallen by 45% compared to the pre-Brexit years 2017-19. - Work in the EU is reducing. 74% of respondents work in Jazz clubs. it is crucial that the demand side of the equation is addressed and maintained. - The supply of trained musicians from conservatoires increases each year. A crucial question for everyone is whether the demand is being addressed.

STRENGTHS +	WEAKNESSES -
• Tenacity and ability of jazz promoters, especially volunteer jazz promoters, to keep promoting despite funding problems and the after-effects of Covid on box office finances • A pool of experienced promoters with regional spread • 79% of income comes from the box office • Promoters are small scale and provide an invaluable touring network for the UK jazz Scene • 45% of respondents charged between £7 and £10. The current ticket prices can be seen as a strength if they can be sustained at the current rate of inflation. • The overwhelming criteria for booking the bands was musical excellence • The overwhelming criteria for booking the bands was musical excellence • Promoters have dedicated people who handle core areas of work. (86% of promoters had a designated person handling the bookings of the bands and 84% had a person dealing with the promotion of events and marketing).	• The current low-ticket prices can be seen as a weakness if inflation continues and costs rise. • Grassroots Music Venues operate on a profit margin of 0.5% and suffer from major financial threats including business rates, rent hikes, and long-term instability. • According to this survey, an aging demographic in terms of audiences • An aging demographic among promoters, and 80% were male There are now more disabled people post-COVID and more people are disabled due to an aging population. Current statistic shows that 24%²⁵ of people the UK are disabled (largely due to an ageing population and upcoming dementia crisis) and no one has thought to directly market to this richest slice of society yet. • There have been reductions in Local Authority, Arts Council, PRS Foundation, and Sponsorship funding • The percentage of promoters booking diverse bands was low and 62% of promoters had not booked any bands led by, or including, deaf and/or disabled musicians. • Percentage of the programme featuring women led bands were low. • 60% of hirers of venues had no official or binding agreement with their landlords • 40% of promoters stated they were unable to make long term plans • 27% of respondents said their venue was accessible to people with hearing impairment through the provision of audio enhancements, such as induction loop or intra red systems • The Arts Council is the major Arts funder in England yet only 27% of the respondents had read the Arts Council England's 10-year strategy "Let's Create" and only 18% of the survey had read the delivery plan.
OPPORTUNITIES	THREATS
• The key opportunity is for promoters to collaborate to secure adequate funding, for example Mjazz and Jazz West Midlands. • The development of a unified, coordinating and lobbying body to drive home the value of jazz to the Arts Council and the Department for Culture Media and Sport. The existing Jazz Promotion Network, or a similar body, could be designated • Co-ordinated bidding for funds	• Survey shows aging demographic among promoters • Lack of funding • Ageing audience • Lack of promoters' secure agreement with their landlords coupled with promoters not being able to develop long term plans. • Volunteer jazz promoters tend not to own their premises, and were excluded from much of the Government's funding for small venues

²⁵ [House of Lords Library](#)

• Development of a grass roots music chain in town centres	
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People and Organisations

STRENGTHS	WEAKNESSES
People and Organisations • Talent and expertise among British Jazz Musicians second to none. • UK music's contribution to the UK economy in 2023 hit a record £7.6 billion in terms of Gross Value Added (GVA) – up 13% from £6.7 billion in 2022. • UK music exports revenue in 2023 hit a new high of £4.6 billion – up 15% from £4 billion in 2022. • Total UK music industry employment in 2023 hit a record 216,000 (full-time equivalent posts) – up 3% from 210,000 in 2022. . • The UK is a world-leader when it comes to jazz composition and is renowned for its world class jazz scene. • Jazz, in the UK, is now more inclusive in terms of accessibility for working-class young people and adults to learn, participate in and attend jazz events. • Artists being promoted are far more diverse than in the past, in terms of age, race and gender, although there is still work to do on all fronts. • There are a number of Arts Council England funded organisations such as Tomorrow's Warriors, Jazz re: freshed, Serious, We Out Here, Jazz North, National Youth Jazz Collective, National Youth Jazz Orchestra • A plethora of festivals and promoters, both commercial and voluntary.	People and Organisations • Lack of national co-ordination, due in part to heavy dependence on volunteer organisers • Lack of funding, both public and private • Inadequate remuneration of jazz musicians • Income from recorded music is insufficient for music creators in general, jazz musicians in particular. • Female jazz musicians are still under-represented • A need for more professionally-trained managers and agents required to help the jazz sector grow • Long-standing issues with music streaming. There is evidence of multinational corporations wielding extraordinary power, and songwriters and composers being marginalised. • VAT on tickets, now 20 per cent. A reduced rate of 7.5% (the average reduced rate in the EU for cultural events) would be very effective • With internet radio it appears that there are no funds available and little or no advertising. This gives rise to a number of volunteer internet radio stations not unlike volunteer promoters – but as yet not joined up to the volunteer promoters' networks. • The current audience for jazz is poorly served by lack of positive mainstream media coverage especially in the broadsheet papers • Lack of information about overseas markets • UK Musicians currently find it extremely difficult to get booked by European promoters and to navigate the bureaucracy, owing to a lack of clear, detailed information. Europe looks up to the UK music scene for its inventiveness and quality of musicianship. This is now in danger of being lost • Youth Music Organisations are dually funded by Arts Council England and the Department for Education. • In order to ascertain the future trends in jazz, and the probable health of the genre in future years, there should be a survey of England's 43 new Music Hubs and their equivalent organisations in the other home nations, to map jazz opportunities amongst the 5-18 age group in schools and their communities, and any strategies for further development. • There are no UK based jazz conventions, continuing workshops or seminars that bring together the philosophies and practices within jazz education and its expression.

	• Improvisation is under-included in the national music curriculum • Despite the inclusion of jazz into music education, most teaching and learning strategies employed by jazz musicians remain underused, and are yet to be embedded throughout teacher education • There is an absence of professional development for teachers and educators and jazz practices • Associated Board jazz exams end at grade 5 (Non-jazz syllabi go to grade 8 and are only made available to five instruments). • No UK teacher training course covers jazz pedagogy or curriculum. • Since 2012 very few schools and music services have been able to afford any form of Continuing Personal Development (CPD)
OPPORTUNITIES	THREATS
People and Organisations • A shift in policy by Arts Council England (ACE) toward much greater fairness in the allocation of funding between art forms, underpinned by greater expertise and understanding at senior levels • Small venues are crucial to the UK jazz scene for musicians and bands at every level whether emerging or remerging. Subsidies to maintain small venues are needed to develop the musicians' craft and to build audiences and followers. • Support for regionally dispersed jazz promoters/venues and a much more substantial support for touring • A greater emphasis on business /marketing skills for those undertaking jazz degree courses. See Appendix 5.3 • Lobby for an initiative by ACE and British Council to support touring overseas by British jazz musicians to enable them to take a place on the international stage more proportionate to their talents. • Satisfy the need for more professionally-trained managers and agent • Opportunities to provide UK teacher training courses with strands on jazz pedagogy or curriculum.	People and Organisations • There is currently a serious shortage of skilled workers in the Arts sector • Since the re-introduction of carnets, work permits, withholding taxes and other regulations, the costs involved in touring have risen excessively, making international gigs financially unviable. This is at a time when jazz in the UK is trying to grow one of the UK's most valuable and popular exports: music. • A lack of professionally-trained managers and agents. • Lack of investment in music in schools; more and sustained opportunities for children and young people to meet and engage with professional artists. • Survey the music education hubs. In many areas there are probably are lot of opportunities in schools and communities provided by schools and music hubs but they are not known about • Lack of funds to pursue a 'levelling up' agenda. • Volunteer promoters run on minimal financial margins

Appendix 2 - PESTEL Analysis

PESTEL analysis is a framework to analyse the wider environmental factors that have an impact on an organisation, company, or industry. It examines Political, Economic, Social, Technological, Environmental, and Legal factors in the external environment. A PESTEL analysis is used to identify threats and weaknesses which are used in the SWOT analysis above, which is helpful in this instance in putting Jazz in England into a broader context.



POLITICAL

- An overriding context of political and fiscal uncertainty in the UK under a New Labour Government
- Government's expressed intention to create a National Culture Infrastructure Map of all the cultural spaces across the UK which may or may not materialise
- Government promises to review the Creative Curriculum
- Government announcements about a new Visa waiver system for artists
- A perceived lack of direction/lack of vision and policy for the arts in the UK
- Absence of a separate Art Form Policy for Jazz from Arts Council England
- Cuts to disabled people in benefits, very low wage job offers

ECONOMIC

- Continuing rise in rate of inflation and cost of living
- Uncertainty about fluctuations in Interest rates
- Falling disposable incomes for most householders
- Low levels of income averaging £20,700²⁶ for jazz musicians (63% surveyed earned less than £20,000 per annum)
- Low number of successful applications by jazz musicians to National Lottery Project Grants 2022/23 (**see Appendices 3 and 4**)
- Ongoing fall out from Brexit with a negative effect on musicians work in the EU
- planned US visa price hike for UK musicians
- The supply of trained musicians from conservatoires increases each year. A crucial question is whether the demand side is being addressed? (**see Appendix 3**)
- Earnings from streaming services are risible. Government has announced (September 2023) the creation of a working group to look at fair pay for musicians and music creators - a milestone in the Campaign to Fix Streaming.
- The Music Venues Trust (MVT) 2023 report found 125 grass roots music venues closing at the rate of two per week last year,

²⁶ Musicians' Union/Help Musicians. Musicians' Census Financial Insight Report September 2023

- An ACE fund to support grassroots music was announced in November 2023 offering grants of up to £40k to rehearsal spaces, recording studios, festivals, venues and promoters.
- The Music Export Growth Scheme, which is managed by the BPI to boost UK music exports by making grants available to small-and medium-sized independent music companies to support artists' careers in overseas markets – on hold awaiting information.
- The rate of employer Class 1 National Insurance contributions will increase from 13.8% to 15%. The threshold at which employers are liable to pay NI will also drop from £9,100 to £5,000 per employee, effective April 6, 2025
- Many disabled people live below the poverty line.

SOCIAL

- Change in consumer behaviour post-pandemic e.g. fear, mental health crisis
- Ageing population
- Other forms of entertainment competing for market share
- Campaign for the Arts reports that since 2010, arts enrolment has dropped by 47% at GCSE and 29% at A-level. This decline has major implications for the education and aspirations of young people
- Ofsted has published a new report into music education in schools in England, revealing serious inequalities in terms of access to instrumental tuition, among other findings. See [Striking the right note: the music subject report](#)
- Acceptances by female jazz students at conservatoires have never gone beyond 20 in any year over 11 years. **See Appendix 5 below.** What is also notable is the low level of female applicants compared to male applicants.
- Barriers exist for women and girls in schools that need to be addressed if changes in gender participation in jazz and improvising are to happen. Please see [Jazz and improvising: experiences, attitudes and beliefs of United Kingdom \(UK\) secondary school music teachers: listening for gender](#) Pauline Black, 2023
- There are two distinct jazz audiences, with different outlooks on, and expectations of, the jazz genre.
See Appendix 6 below
- The Musicians' Census from the Global Majority Insight Report demonstrates that discrimination is still an unfortunate reality for musicians from the Global Majority, with 85% saying they had witnessed or experienced some form of discrimination. Please see: [Global Majority Insight Report](#)
- There are now more disabled people post-COVID and more people are disabled due to an aging population. Current statistic shows that 24%²⁷ of people the UK are disabled (largely due to na aging population and [upcoming dementia crisis](#)) and no one has thought to directly market to this richest slice of society yet.

TECHNOLOGICAL

- Increase in streaming platforms
- Potential downsides to AI in music production. The technology could ultimately replace human musicians and producers, leading to job loss.
- Increase in digital platforms for marketing communications
- Explosion of social media allowing closer interaction with musicians and the wider jazz community
- Problems with X (formerly called Twitter) and the advent of Threads
- Artificial Intelligence (AI) - the speed of technical development as it has already outstripped legislative frameworks to respond effectively.

ENVIRONMENTAL

- Climate change
- Renewable energy sources
- Water shortages and impact on venues' ability to operate

LEGAL

- Red Tape around Brexit and freedom of movement

²⁷ [House of Lords Library](#)

- The National Plan For Music Education was introduced in June 2022 See [Here](#)
- There is a Model Music Curriculum that includes jazz. See [Here](#)
- DfE / ACE have amalgamated existing Music Hubs into larger regions. 119 local hubs have been reduced to 43 larger regional hubs, which undoubtedly set back progress on new initiatives by music hubs over the restructure period. The one year funding settlement now in place, without any pledge for future longer term funding from DfE, has created additional uncertainty and impacts long term ambitious strategies and planning for jazz in schools and communities. (A 3-4 year funding settlement akin to NPOs would help alleviate this)
- Comprehensive review of Arts Council England taking place in 2025

Appendix 3 - Applications to National Lottery Project Grants (NLPG) 2016 to 2023

Analyses applications to National Lottery Project Grants (NLPG) 2016 to 2023 gleaned from Arts Council England documents and freedom of Information Inquiries.

3.1 Introduction and summary

Set out below are statistics gleaned from Arts Council England documents and freedom of Information Inquiries.

Table 1: from 2012 to 2016 the average success rate for jazz awards against all music applications was 4.4%.

Table 2: from 2018 to 2023 the average success rate of jazz awards, as a percentage of all total eligible applications, was 1.2%.

Table 3: the success rate of Jazz applications to the *Supporting Grass Roots Live Music Fund 2022/23* was 2%.

3.2 Grants for the Arts investment in music and jazz 2012/2016

The tables below show the awards for jazz. In 2012/2013 the number of successful jazz applications for lottery funding was 37 rising to 146 in 2019/20, reducing to 69 in 2023. In fairness to Arts Council England this may be due to a number of reasons: a lower number of applications, the quality of the applications, or an insufficiency of funds. The Arts Council has just announced that it has been listening and simplified the forms. However, a musician who has applied to the new application process said "They constantly change the questions and format. They are more and more obscure, and it's harder to fathom out what they want to know" [name and email address supplied]

Lottery Awards for 2012 to 2016 in Table 1 has a success rate for jazz awards, as a percentage of all music applications, rising from 3.5% to 5% in 2016.

From 2012 to 2016 all music awards increased from £10.9m to £18.9m. Jazz awards increased from £0.6m (39 awards) in 2012/13 to £1.8m (99 awards) in 2015/16

Grants for the Arts investment in music and jazz 2012/2016

Decision Year	2012/13	2013/14	2014/15	2015/16
All music applications	1,058	1,301	1,638	1974
Music awards	495	652	863	959
Success rate %	46.8%	50.11%	52.68%	48.56%
All Music Awards £s	£10,958,337	£14,198,508	£14,791,496	£18,949,401
Jazz Applications	69	99	115	169
Jazz Awards	37	61	70	99
Jazz Awards £'s	£576,498	£1,206,711	£1,001,544	£1,843,492
Success rate of jazz awards as against all music applications	3.5%	4.68%	4.27%	5%
% Increase of jazz awards on previous year	-	64.86%	14.75%	41.42%

Table 1 Source: Arts Council England

3.3 National Lottery Project Grants to music and jazz from April 2018–2023

In Table 2, from 2018 the success rate of jazz awards, as a percentage of all total eligible applications, decreased from 1.5 % to 0.88% in 2023.

From 2018 to 2023 the total of all music awards increased from £10.8m to £15.4m. The numbers of jazz awards decreased from £2.09m (135 awards) in 2018/19 to £1.9m (69 awards) in 2022/23.

Table 2 contains other data such as the success rate percentage of all music awards against total eligible applications is an average over the six years of 7.06%

Decision Year	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Total number of eligible applications	8,793	9,107	6,942	9,627	7,836	7,810
Total number of successful applications	4,296	4,543	2,936	3,968	2,992	2,895
Successful applications [£s]	£85,596,208	£99,712,522	£61,299,276	£109,118,061	£105,045,514	£114,603,317
Success rate % of successful applications against total eligible applications	48.9%	48.9%	42.3%	41.2%	38.2%	37.1%

Decision Year	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
All music Applications	1547	1779	1763	2142	1626	Not available
All Music Awards	659	739	479	638	498	539
Success rate % of all music awards against total eligible applications	7.6%	8.1%	6.9%	6.6%	6.3%	6.9%
All Music Awards £s	10,823,451	13,572,936	8,254,914	14,993,889	15,407,336	Not available
Jazz Applications	251	283	188	260	184	Not available
Jazz Awards	135	146	64	104	69	Not available
Jazz Awards £	£2,096,608	£2,807,727	£1,070,259	£2,345,291	£1,924,654	Not available
Success rate of jazz awards as a % of all jazz applications	53.7%	51.5%	34%	40%	37.5%	Not available
Success rate of jazz awards as a % of total number of eligible applications	1.5%	1.60%	0.92%	1.08%	0.88%	Not available
Success rate of jazz awards as a percentage of total successful application	3.3%	3.2%	2.1%	2.6%	2.3%	Not available
% Increase(decrease) of jazz awards on previous year	-	8.1%%	(56.1%)	62.5%	(66.34%)	Not available

Table 2 Source Arts Council England

Notes to the table

'All Applications' includes successful, rejected, and ineligible applications, and is likely to include multiple resubmissions of the same or similar projects.

'Jazz Applications/Awards' are defined as any application where Jazz was identified as a relevant music art form in the application process.

'Decision Year' refers to the date ACE committed to fund a project. The date of payment and/or activity will be later than this date, and in some cases, activity may not commence in the same financial year as decision. Amounts awarded are subject to change and are correct as of the Date reporting is completed (07/09/2023).

3.3 Supporting Live Music Venues

There were two funding streams: **National Lottery Project Grants** and **Supporting Live Music Applications** in 2022/23. Only 10 jazz applicants received monies for Supporting **Grass Roots Live Music** (SGM). (see table 3 below)

That fund was planned to close in March 2023. A key recommendation from the ‘Supporting Grassroots Live Music Evaluation Report’ undertaken by ‘the hub’ is this:

“.....a priority must be ensuring that such venues and promoters are as equipped as possible to make successful applications”

Supporting Grassroots Music Fund has been extended beyond March 2025

A new fund to support grassroots music has just been announced which will offer grants of up to £40k to rehearsal spaces, recording studios, festivals, venues and promoters.

Funded by the Department for Culture, Media and Sport (DCMS), the SGM fund is part of the UK government’s Creative Industries sector vision, which aims to grow the creative industries by £50bn by 2030. It will be administered by Arts Council England (ACE) and follows on from the funder’s Supporting Grassroots Live Music programme, initially launched in 2019.

The problem is that instead of focusing on small grassroots venues, the Arts Council has decided to broaden the scope, and thereby dilute the crucial need to fund grass roots venues.

However, it is worth noting that jazz organisations tend not to own their premises, and were excluded from much of the Government’s funding for small venues

3.3.1. Jazz applications to the *Supporting Grass Roots Live Music Fund 2022/23*

Total National Lottery Project Grant (NLPG) music applications	496
[of which] total Supporting Grass Roots Live Music applications	97
Total NLPG funds awarded	£15,407,336
Total amount of money awarded to <i>Supporting Grass Roots Live Music</i> applications	£2,060,925
Percentage of total NLPG funds	13%
[of which] total jazz applications in Supporting Grass Roots Live Music	10
Total amount of money awarded	£212,993
Percentage of total amount of money awarded to <i>Supporting Grass Roots Live Music</i>	10%

Table 3 Source: Freedom of Information (FOI), Arts Council England

Appendix 4 - Arts Council England: Growth of National Portfolio Organisations in Relation to Lottery Funding

Looks at Arts Council England and the growth of National Portfolio Organisations in relation to lottery funding

4.1 Growth of National Portfolio Organisations (NPOs) 2012-2026

There has been a 49% increase in the numbers of NPOs since 2015. The subvention from the DCMS has been supplemented by lottery funds.

Year	Number of Arts Council England funded National Portfolio Organisations	Percentage increase or (decrease) on the previous year
2012/15	703	-
2015/18	663	(5.6%)
2018/22	828	19.9%
2023/26	985	18.9%
Increase of numbers of NPOs on 2015/18	322	48.5%

Table 4 Source: Arts Council England

4.2 Lottery Funding of National Portfolio Organisations 2023/2026

On 4 November 2022, Arts Council England announced that it will be investing £446 million per year in 990 organisations through its 2023-26 Investment Programme. This is made up of £351.8 million from The Department for Digital, Culture, Media & Sport (DCMS), £0.5 million from Department for Education and £93.9million from The National Lottery.

(please see <https://committees.parliament.uk/publications/31958/documents/179403/default/>)

Then on 31 March 2023, ACE announced funding for NPOs for 2023/2026. There are 985 NPOs of which 275 are new applicants. 985 organisations will receive in total £444.5m. This is made up of £370.6m of core funding and £73.9m of lottery funding

A Freedom of Information Inquiry to Arts Council England on 7 April 2023 elicited the following facts:

....there are annual budgets that have been signed off by Executive Board and National Council, but they are subject to change if DCMS confirm a reduced settlement.

Excluding restricted funds and income from National Lottery, these budgets currently stand at the following:

- Grant in Aid core admin before IFRS 16 adjustment £15.764m
- Grant in Aid core Programme £370.675
- Grant in Aid Capital programme £11.819

A further Freedom of Information Inquiry on the 14 April 2023 provided the following:

The final accounts for 2022/2023 are still being finalised and will be published at a later date. However, the current figures state:

- Lottery income was £252.74m
- Lottery expenditure was £448.53m.

Expenditure is notably higher than income because we have committed to paying out grants to NPOs for the next three years.

Lottery budgets for 2023/2024 are estimated at £251.7m, though this is dependent on lottery sales across the year so may change.

On 12 April 2023, £35.36m of lottery funding was awarded to English National Opera. There was the following announcement from Arts Council England and English National Opera:

Following development work by the English National Opera (ENO), Arts Council England has set a budget of up to £24 million investment for 2024-26. The company will now start the process of making an application to the Arts Council for an award up to this amount. ENO's developing plans are based on a reimagined artistic and business model with a primary base out of London, whilst continuing to own, manage and put on work at the London Coliseum.

The provisional budget of up to £24 million investment for 2024-25 and 2025-26 is to support the ENO make a phased transition to this new artistic and business model, and will include work split between their new main base and London. This will be subject to application and assessment with a decision by the Arts Council expected this summer. This funding would be in addition to the £11.46 million already agreed for 2023/24.

The shared ambition is for the ENO to be in a strong position to apply to the Arts Council's National Portfolio of funded organisations from 2026.

4.3 Lottery funding is being awarded to NPOs at the expense of individuals and non-funded organisations

Applicants to the National Lottery Project Grants programme will have some light shed on a stock response to failed applicants from the Arts Council England of an "insufficiency of funds".

Under Lottery funding, the Projects Grant lottery application process and form is now so cumbersome (even for very small amounts) you almost need to be a funding specialist to be able to get it. It also takes hours / days to apply. It needs reforming into a much simpler form for smaller grants that wouldn't exclude people who aren't arts administrators / funding specialists. At the moment it is very exclusive

In the year 2018/19, the success rate was almost 50% for applicants to National Lottery Project Funding; by 22/23 that was down to 38%. Success rates for those with a London address are lower: currently 32% in the present financial year.²⁸ **Creative Lives In Progress** in 2023 asserted the success rate was as low as 10 – 20%²⁹. In either case, due to lack of funding, success rates are way down.

In 2018/22, as well as receiving core funding from the Lottery, Arts Council England's National Portfolio Organisations were awarded over half of all Strategic and Capital funding.

Please see: <https://www.artsprofessional.co.uk/news/ace-draws-lottery-reserves-npo-funding>

The use of lottery funding for core funding is questionable. Lottery funds are not supposed to be used as an alternative to Government funding known as "additionality" – that is Lottery funding should not "become a substitute for funding that would normally fall into mainstream Government spending".

The use of Lottery funding to shore up National Portfolio Organisations (NPOs) started in the Arts Council England funding round of 2012-2015, where £54m was used to shore up NPOs. This continued in the 2015/2018 funding round, where £180m of Lottery funds were used for NPOs in the same way. In the latest funding round – 2019/2023 – this figure rose to £326m.

The Arts Council England report and accounts for 2022/2023 show that about £280m of lottery funding was allocated to NPOs, assuming this is spread over three years. Then the Arts Council announced that ENO is to receive £11.46m for 2022/23 plus £24m lottery funding for 2024/2026 (subject to application) a total of £35.76m. The total of lottery funding to NPOs and one ex-NPO is £316m

The Arts Council has raided lottery funds to buttress NPOs. This reduces the funds available to individuals and organisations who do not have NPO status. NPOs are also eligible to apply for Arts Council National Lottery Project Grants – they have the capacity to seek additional funding elsewhere. This is not a level playing field, nor is it levelling it up. It is discriminatory and levels down. Many individuals and organisations will apply and be turned down due to the spurious reason of insufficiency of funds and that lottery funding has not increased. The available lottery funding has decreased as the Arts Council has awarded it to NPOs.

²⁸ Lyn Gardner, "Is ACE project funding working for artists?", The Stage, 29th Feb 2024

²⁹ Lara Munro, "What is Arts Council funding and how can you apply for it?", Creative Lives In Progress, 11 July 2023

4.4 The core concept of “additionality” would appear to have been negated

The lines have become increasingly blurred at the expense of the musician, band, dancer, touring theatre and so forth

157 From the inception of the National Lottery, the Government has stated its commitment to the principle of additionality. In the 1992 White Paper it was stated that the Lottery would fund only projects additional to those that would otherwise be funded by the public through general taxation.

158 DCMS, in written evidence to this inquiry, defines the principle of additionality as not allowing Lottery funding to ‘become a substitute for funding that would normally fall into mainstream Government spending’ and states that it ‘remains firmly committed to the principle.’

165 We believe that the additionality principle is being eroded, especially with the establishment of the Olympic Lottery. This Committee deplores this erosion. Therefore, we shall consider returning to the additionality principle before the end of this Parliament. In the meantime, we call on the Secretary of State to make an annual report to Parliament on how the additionality principle has been applied”³⁰

4.5 National Lottery Project Grants Funding of National Portfolio Organisations

Table 5 below illustrates National Lottery jazz Project Grants to NPOs.

The success rate of National Lottery Project Grants awards to total applications by NPOs is an average of 74.4%. When the average success rate 74.4% is compared to the average success rate of 42.7% for the total number of successful applications against total eligible applications the National Lottery Project Grants Scheme for individuals and non-NPO organisations in Table 2 above, there is a marked difference

The success rate of National Lottery Project Grants jazz awards as a percentage of all NPO jazz applications ranges from 75% in 2018/19, through 100% from 2019/2021 and back to 50% in 2022/23. The average is 82.5%. When this is compared to **table 2** (the success rate of jazz awards as a percentage of all jazz applications), the average success rate for jazz awards against all jazz applications for 2018/2023 is 43.4%. There is a substantial difference from the success rate of NPOs to that of individuals and non NPO applications – National Portfolio Organisations stand a better chance of succeeding

4.5.1 National Lottery Project Grant applications made by National Portfolio Organisations 2018–2023

Decision Year	2018/19	2019/20	2020/21	2021/22	2022/23
Total applications	40	47	29	70	23
Awards	26	36	25	47	17
Success rate %	69%	77%	85%	63%	78%
Awards £s	£789,446	£1,953,710	£1,188,853	£2,473,442	£1,008,536
Jazz Applications	4	6	2	8	2
Jazz Awards	3	6	2	7	1
Jazz Awards £	£79,662	£518,704	£109,288	£363,625	£85,576
Success rate of jazz awards as a % of all jazz applications	75%	100%	100%	87.5%	50%
Rate of successful jazz awards as a percentage of total applications	7.5%	12.7%	6.9%	10%	4.3%

Table 5 Source: Arts Council England. Amounts awarded are subject to change and are correct as of the date Arts Council England reporting is completed on the Freedom of Information Inquiry of 25th September 2023

³⁰ Select Committee on Culture, Media and Sport Fifth Report 9th March 2004
<https://publications.parliament.uk/pa/cm200304/cmselect/cmcmds/196/19611.htm>

4.5.2 National Lottery Project Grant applications made by National Portfolio Organisations NOT identified as jazz related: 2018-2023

Tables 6 and 7 below show the break down between applications for jazz projects made by non-jazz NPO's and applications for jazz projects by jazz NPOs. The average success rate of jazz awards as a percentage of all jazz applications, is 73.3% and 70%

The success rate for National Portfolio Organisations is greater than that of organisations and individuals applying for National Lottery Project Grants. No one can blame NPOs for applying, but this Arts Council policy has unintended consequences which need urgent attention. There is not a level playing field and it is also divisive.

Decision Year	2018/19	2019/20	2020/21	2021/22	2022/23
Total applications	32	35	27	54	18
Awards	22	27	23	34	14
Success rate %	69%	77%	85%	63%	78%
Awards £s	£639,114	£1,328,419	£1,065,498	£1,746,303	£860,485
Jazz Applications	2	3	2	3	1
Jazz Awards	2	3	2	2	0
Jazz Awards £	£30,000	394,971	£109,288	62,471	0
Success rate of jazz awards as a % of all jazz applications	100%	100%	100%	66.66%	0%
Success rate of successful jazz awards as a percentage of total applications	6.25%	8.57%	7.4%	3.7%	0%

Table 6 Source: Arts Council England. Amounts awarded are subject to change and are correct as of the date Arts Council England reporting is completed on the Freedom of Information Inquiry of 25th September 2023

4.5.3 National Lottery Project Grant applications made by National Portfolio Organisations IDENTIFIED as jazz related. 2018–2023

Decision Year	2018/19	2019/20	2020/21	2021/22	2022/23
Total applications	8	12	2	16	5
Awards	4	9	2	13	3
Success rate %	50%	75%	100%	81%	60%
Awards £s	£150,332	£625,291	£123,355	£727,139	£148,051
Jazz Applications	2	3	-	5	1
Jazz Awards	1	3	-	5	1
Jazz Awards £	£49,662	£423,913	-	£301,154	£85,576
Success rate of jazz awards as a percentage of all jazz applications	50%	100%	0%	100%	100%
Success rate of successful jazz awards as a percentage of total application	12.5%	25%	0%	31.25%	20%%

Table 7 Source: Arts Council England. Amounts awarded are subject to change and are correct as of the date Arts Council England reporting is completed on the Freedom of Information Inquiry of 25 September 2023

4.6 National Portfolio Organisations' share of the music budget for 2023/2024

Set out below is a breakdown of music National Portfolio Organisations awards in the last funding round. 73% of the music allocation went to classical music and opera.

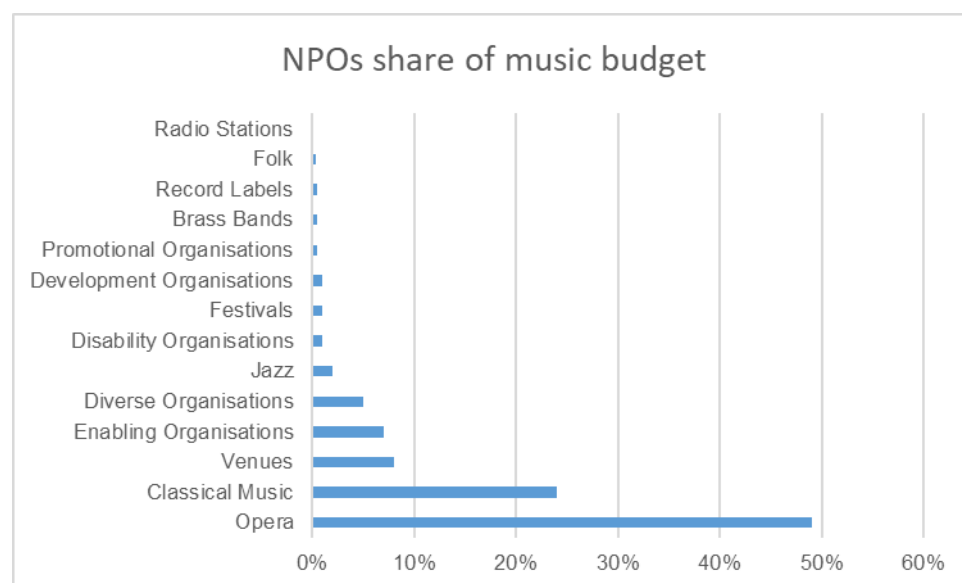


Figure 1

4.6.1 NPOs share of music funding 2023/2024

NPOs	Share of funding	% Share of funding
Opera	£43,613,311	49%
Classical Music	£21,369,354	24%
Venues	£7,061,804	8%
Enabling Organisations	£6,169,347	7%
Diverse Organisations	£4,108,492	5%
Jazz	£1,962,567	2%
Disability Organisations	£1,385,859	1%
Festivals	£1,088,281	1%
Development Organisations	£933,168	1%
Promotional Organisations	£529,406	0.50%
Brass Bands	£525,072	0.50%
Record Labels	£506,076	0.50%
Folk	£396,748	0.40%
Radio Stations	£160,000	0.10%
Total	£89,809,485	100%

Table 8 Source: Arts Council England

Notes to Fig. 2 and Table 8. The total fund for music organisations is £65,129,380 for 2023/24 (Data NPO's Investment 2023/26, Arts Council England) to present the true scale of music funding ENO funding for 2023/24 of £11,460,000 and an apportionment of Royal Opera House Funding of £13,138,120 has been added

4.6.2 National Portfolio Organisation jazz applications 2018 – 2026

The jazz applications and jazz awards are for jazz and jazz-related organisations. Please note the number of jazz organisations is about 7.

NPO Round	All Applications	All Awards	Award (£)	Jazz Applications	Jazz Awards	Jazz Award (£)
National Portfolio 2018-22	1173	857	£1,637,818,918	53	33	£43,586,368
2022-23 Extension	833	831	£410,378,190	33	33	£10,995,928
2023-2026 Investment Programme	1720	985	£1,325,487,339	53	40	£21,963,999

Table 9 Source: Arts Council England FOI 18 September 2023

Notes to table 9

Total NPO counts are based on specific agreements and as such may represent migrations and novations across multiple agreements.

The 2022-23 NPO Extension was only eligible for NPOs already funded in the 2018-22 Portfolio

Jazz-related figures for the 2022-23 NPO Extension are based on the assumption of continuation of information provided for those NPOs in the National Portfolio 2018-22 round.

NPO Award (£) value refers to full award at the point of decision when ACE committed to fund the project, for the full duration of the NPO round.

Appendix 5 - Applications and acceptances to the 11 Conservatoires' jazz courses

Is about jazz and education, highlighting issues to do with recruitment, gender balance, curriculum design and relevancy, and also posits a new model of teacher training akin to how dance teachers are trained.

Jazz Applications and Acceptances by Year

Year	Total Applications	Total Acceptances	Male Applications	Male Acceptances	Female Applications	Female Acceptances
2012	420	55	335	45	85	10
2013	475	70	370	60	105	10
2014	515	85	435	70	80	15
2015	735	145	620	125	115	20
2016	645	130	525	110	120	20
2017	545	120	450	100	95	20
2018	480	115	390	100	90	15
2019	520	105	450	95	70	10
2020	600	135	480	115	120	20
2021	560	110	470	95	90	15
2022	505	100	425	80	80	20

Table 10

- 5.1 Over 11 years, the number of acceptances of female jazz students at British conservatoires has never gone beyond 20. What is also notable is the low level of female applicants compared to male applicants.
- 5.2 However, the Conservatoires are now probably the essential route through to get to a professional career in jazz. The quality is extraordinary.
- 5.3 The supply of trained musicians from conservatoires increases each year. A crucial question for everyone is whether the demand is being addressed.
- 5.4 **Business Education on music courses:** greater emphasis on business/marketing skills for those undertaking jazz degree courses. Freedom of Information Inquiries to the HESA (Higher Education Statistics Agency) to ascertain full-time and part time employment outcomes for music courses at universities and conservatoires for their jazz courses and in particular what type of employment do the graduates take up when they leave? Revealed that this information isn't available within their Open Data. It may be available via a bespoke data request, though

this would likely incur a charge. There is a lack of information that accurately pinpoints the nature of employment of graduates from music courses.

- 5.5 Teacher Training** - Perhaps a new model is required. For example, the Royal College of Dance, which exists primarily to train dance teachers also trains them to a high level as dancers. There's nothing quite like this (certainly at undergrad level) in music

Appendix 6 - The audience for jazz

There are two different kinds of audience, with different outlooks on, and expectations of, the jazz genre.

The first audience is a predominantly older demographic listening to jazz in a wide variety of venues often those of volunteer promoters. The second audience is a young, diverse audience.

In 1986, 38 per cent of the audience for jazz was aged between 15 and 24 years. By 2008/2009 this had changed dramatically, 17 per cent of the audience for jazz was aged 15-24 whereas the audience³¹ in the 2019/20³² *Taking Part* Survey 1% were aged between 16 to 24 years of age. The demographic shift appears to illustrate a decline among the 15–34-year-olds that are crucial to ensuring that jazz continues to build its audiences

Set out below is a comparison of three sets of data, Taking Part 2015/2016, 2019/2020 and the *Review of Jazz in England* survey 2021/22. The shows a declining audience in the 16-24 age groups with the predominance of audiences over the age of 45.

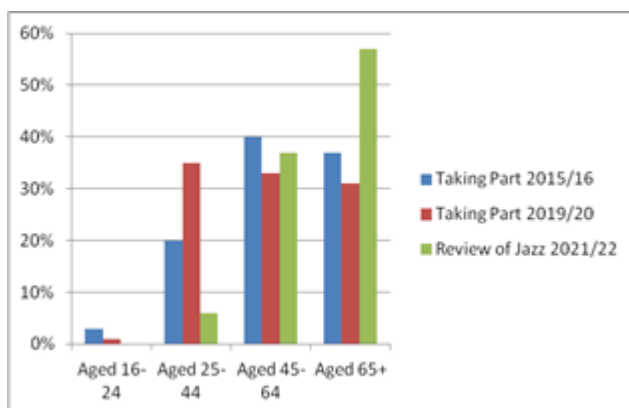


Figure 2

In the review of jazz in England 47% of promoters reported that 16–19-year-olds accounted for up to 10% of their audiences with 6% of promoters saying 16–19-year-olds accounted for 11-20% of their audiences. 37% of respondents reported audiences aged 26 to 45 years of age. 55% of promoters accounted for audiences of 30% - 60% aged 46 – 55 years. 55% of promoters reported 10% to 40% of audiences were aged 76+ years of age. All the indications are of an aging audience amongst respondent's venues.

Unfortunately thanks to a Freedom of Information inquiry, the author has discovered that:

"The [2021/22](#) Participation survey has figures for live music event attendance and respondents that had written or performed music available in our data tables. However, this does not include a breakdown of individual art forms for music".

The last survey where attendance at art forms is disclosed is the 2019/20 *Taking Part* survey.

³¹ <https://www.emerald.com/insight/content/doi/10.1108/AM-09-2013-0015/full/html>

³² Ibid 7

The second audience would probably not respond to a question on jazz, as it does not take into account that there has been a paradigm shift in how a young audience today classifies jazz and where they listen or attend.

In 2005 Stuart Nicholson argued

We are, then, at a key moment in jazz history. The music is being reshaped and reimagined beyond the borders of the United States through the process of glocalisation and transculturation with increasing authority by voices asserting their own cultural identity on the music. Non-American musicians want to connect with their own surroundings and want to give the music life and vitality that is relevant to their own socio-musical situation, so they are broadening the expressive base of the music in ways over which American jazz has no control”³³

In 2007 Simon Frith argued for a blurring of boundaries:

The key to jazz success is not getting records into the shops but listeners into the venues. And the issue here is not how to get the mainstream jazz audience to attend avant-garde gigs but how to get the audience for avant-garde rock and dance and contemporary music to attend avant-garde jazz shows too. Jamie Cullum fans are unlikely to enjoy a Polar Bear gig (their jazz interests are quite different); Bloc Party fans might. The way forward, in other words, is to blur the boundaries between jazz and other kinds of music rather than to try to mark them out more clearly ³⁴

On the other hand, Eric Hobsbawm took a different angle as far back as 1998:

Is jazz becoming terminally fossilized? It is not impossible. If this should be the fate of jazz, it will not be much consolation that Clint Eastwood has buried Bird in a celluloid mausoleum and that every hairdresser and cosmetics store plays tapes of Billie Holiday. However, jazz has shown extraordinary powers of survival and self-renewal inside a society not designed for it and which it does not deserve. It is too early to think that its potential is exhausted. Besides, what is wrong with just listening and letting the future take care of itself³⁵

The paradigm shift is evidenced, with various sources pointing to an increase in young people streaming jazz³⁶ In July 2019 The Guardian reported: “Rising numbers of younger fans spark a UK jazz renaissance. Streaming sites report growth in young listeners and festivals are signing up more jazz acts”.

Gilles Peterson commented in an interview with Radio France:

Jazz is a music that is sometimes a little too controlled by specialists. That’s what happened in England, with magazines, Ronnie Scott’s, festivals that lost it a bit because they didn’t really feel this new scene The young people consequently did it in their own way, more in DIY mode..... ³⁷

Jazz regularly faces the same problems of low fees and the lack of interest from the broader industry and media. The response to this has been to develop self-help as a “DIY culture based around small communities of musicians, audiences and institutional networks.”³⁸

Over the years, jazz in the UK has seen the value of self-promotion: Humphrey Lyttelton and Ronnie Scott initiated various clubs in the 1950s, Jam Today, followed by the Guest Stars, in 1976-78.

This demographic divide in the current audience for jazz can be seen in the audiences for three Radio Three programmes. 68% of the audience for *J-Z* was over 55+ years of age; 77% of the audience for *Jazz Record Requests* was 55 or over, and for the Jamie Cullum Programme on Radio 2, 60% of the audience were also age 55 or over. The audiences for Gilles Peterson on 6 Music and Cerys Matthews on Radio 2 are opposite, skewing towards younger listeners³⁹

³³ Nicholson, S. (2005), *Is Jazz Dead (or Has It Moved to Another Address)*, Routledge, pp. P239-P240

³⁴ Frith, S. (2007), *Is Jazz Popular Music*, Equinox Publishing Ltd, p. 20

³⁵ Hobsbawm, E. (1998), *Uncommon People. Resistance, Rebellion and Jazz*, Weidenfeldand Nicholson, pp. P291-P292

³⁶ <https://www.theguardian.com/music/2019/jul/29/rising-numbers-of-younger-fans-spark-a-uk-jazz-renaissance>

³⁷ <https://www.radiofrance.fr/fip/gilles-peterson-le-worldwide-est-un-festival-de-puristes-5284815>

³⁸ Mark Banks, Jill Ebrej and Jason Toynbee, *Working Lives in Black British Jazz - A Report and Survey* (The Open University, April 2014) p36-42

³⁹ Freedom of Information inquiries to the BBC 3rd April 2023

Gilles Peterson's *We Out Here* Festival provides a "soundtrack" for the lives of younger listeners where jazz is part of a range of music, hip hop, Afro beat etc.

Hugh Muir, writing about **The Ezra Collective** in *The Guardian*, captured the essence of what Jane Cornwell calls "We Out Here" after the 2018 Brownswood record label that showcased its core players:

There is something flammable in what they do. It's a mix of jazz, funk, reggae, rap and Afrobeat; and the mix is the point. It makes what they do so recognisable to those who like it. To me it is very British. The references come from all over but they are collected and fused together in the same way British society at its best, as well as some sectors of British industry. Draws multicultural strands together, integrating them, making them powerful, making them exportable and saleable...It's when we take the energy and diversity that comes from that cultural synthesis and harness it into something we recognise and enjoy; and others embrace it because it feels fresh and original.⁴⁰

Jane Cornwell encapsulates the new audience in her MA thesis:

Having black musicians onstage and promoting across other genres such as grime and hip-hop has brought in a young, multicultural audience. A shared sartorial style reflects commonly held tastes and values.⁴¹

What has been crucial in the growth of the new audience has been the work of what Jane Cornwell calls the "Jazz incubators". The 1970s jazz workshops at the Weekend Art College in Hampstead shaped the musicians who would become the Jazz Warriors, Tomorrow's Warriors, Jazz re:freshed, Kinetica Bloco plus Serious' training scheme, 'Take Five' and 'Future Bubblers' scheme part of Gilles Peterson's Brownswood Recording.

In a recent post Tony Dudley-Evans noted that as the focus was on the London scene, jazz scenes in other UK cities could be neglected. (see: <https://tdepromotions.wordpress.com/2024/05/19/the-uk-jazz-explosion/>)

".....scenes, such as those in Birmingham, Leeds, Manchester, the North East of England and Glasgow, are all lively scenes that make their own contributions to the variety of the overall UK scene"

Guildford Jazz ran a series titled "Beat" in conjunction with Guildford Boileroom aimed at attracting a younger audience:

- 6–9 gig series
- Venue - Guildford Boileroom
- Mostly young, diverse headline artists
- Young support acts
- First 6 gigs live streamed and available to download
- 15 free tickets to local charities
- 5 -6 jazz improvisation workshops
- Funded by £20K ACE grant and earned income

The outcomes were:

- Artistically successful gigs – view <https://www.guildfordjazz.org.uk/beat>
- 9 rather than original 6 gigs
- 2/3rds of the audience under 50
- Good audience numbers (averaging 120 paying)
- The series continues into 1 H 2024 (without ACE subsidy)
- Free tickets for local charities to continue
- Headline artists well remunerated
- Gig opportunities for great young support acts
- Improvisation workshops
- Costs generally within budget

⁴⁰ Hugh Muir "The sound of a diversity bomb set to music", *The Guardian* 9.09.23.

⁴¹ Jane Olivia Cornwell, *Jazz Refreshed? A Contemporary Jazz Phenomenon* p18

Jazz musicians have always taken care of the music and the history of the music is littered with appropriations of the music of other cultures. What jazz needs is the support of an infrastructure that is sensibly and properly funded. As Humphrey Lyttelton said, "Jazz is like a rock pool. When the tide of musical fashion comes in the rock pool is hidden for a while. But when the tides go out, there is the rock pool again, brimming with life and activity".

However, qualitative research is needed to ascertain what venues young people frequent and how often they attend and is this reflected in audiences especially among the volunteer jazz promoters or are young people attending venues that are outside the known world of jazz

Appendix 7 - Results of the audience questionnaire

7.1 Regional spread of the audiences surveyed

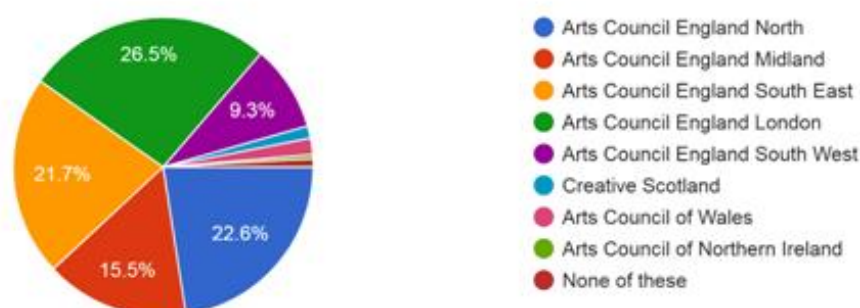


Figure 4

Using the Arts Council England's area map, London provided 27% of the respondents with the North at 23%, the South East on 22%, and the Midlands at 16% and the South West at 10%. Overall, 73% of the respondents lived outside of London.

Arts Council England Area Map



Figure 5

Comparing the regional responses for jazz from the *Taking Part* Surveys of 2015/16 and 2019/20⁴² with the Review of Jazz in England survey the regional responses are similar in each survey, with the exception of London in 2020/21.

⁴² Taking Part 2015/2016 and 2019/2021 [Regional Taking Part Surveys 2015/2016](#)

7.2 Regional responses to surveys 2015/16, 2019/20, 2021/22

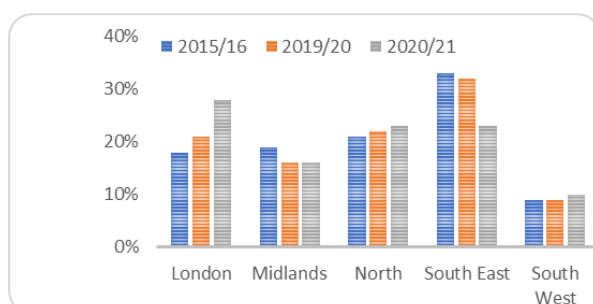


Figure 6

7.3 Demographics

There were 227 responses to the audience questionnaire. This is obviously a tiny portion of the total audience for jazz which in a previous publication, *The Needs of the Jazz Community* was put at around 2.4 million.⁴³

79% are male and female 21%. (The *Taking Part* survey for 2019/2020 had 54% male and 46% female).⁴⁴ 96.4% are white British with people of colour accounting for 3.6% of the sample. 1% of the sample was aged 16-24, 6% aged 24-44, and with 37% aged 45-64 and 56% aged 65+. As might be expected from such figures 61% are retired and 11% identified as a Deaf or disabled person, or have a long-term health condition.

7.4 Review of Jazz in England Survey - age of respondents

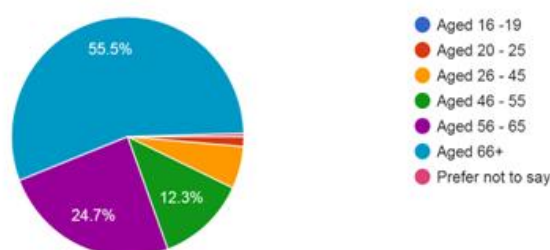


Figure 7

There is a great deal of recent commentary on a resurgence of young audiences, especially on streaming websites but is this reflected in attendance at performances? Streaming music is easier and cheaper than turning up to an event.

Deezer said: *there has been a 15% increase in 18 to 25-year-olds streaming jazz between June 2018 and June 2019, with that age group seeing the biggest percentage increase*.⁴⁵

The *Taking Part* survey for 2015/16 had a sample size for jazz of 559. Of people who attended jazz events, 46% of the sample was male and 54% female. 3% were aged between 16 and 24 years of age with 35% aged between 24 and 44. 33% were aged between 45 and 64 and 31% of the sample were aged over 65.⁴⁶

The *Taking Part* Survey for 2019/20 has a small sample size for jazz of 360. Of people who attended jazz events, 45% of the sample was female and 55%, male. 1% were aged between 16 and 24 years with 35% aged from 25 – 44. 33% were aged 45 to 64 and 31% were aged over 65.⁴⁷

Set out below is a comparison of the three sets of audience data, Taking Part 2015/2016, 2019/2020 and the Review of Jazz in England survey 2021/22

⁴³ Howard Lawes, Professor Stuart Nicholson, Lisa Reyners, Sophie Trott, Chris Hodgkins, *The Needs Of The Jazz Community* (Jazz Services/ JazzUK, available at: <https://bit.ly/3m0fBjn> p12

⁴⁴ Department for Digital Culture Media and Sport, Taking Part Survey 2019/20 [Taking Part Survey 2019/20](https://www.theguardian.com/music/2019/jul/29/rising-numbers-of-younger-fans-spark-a-uk-jazz-renaissance)

⁴⁵ <https://www.theguardian.com/music/2019/jul/29/rising-numbers-of-younger-fans-spark-a-uk-jazz-renaissance>

⁴⁶ Department for Digital Culture Media and Sport, Taking Part Survey 2015/16 [Taking Part Survey 2015/16](https://www.theguardian.com/music/2015/jul/29/rising-numbers-of-younger-fans-spark-a-uk-jazz-renaissance)

⁴⁷ Department for Digital Culture Media and Sport, Taking Part Survey 2019/20 [Taking Part Survey 2019/20](https://www.theguardian.com/music/2019/jul/29/rising-numbers-of-younger-fans-spark-a-uk-jazz-renaissance)

The data in Figure 8 shows a declining audience in the 16-24 age groups with the growth an aging audience over the age of 45.

7.5 Adult Attendance for Classical Music, Opera, and Jazz in millions ⁴⁸

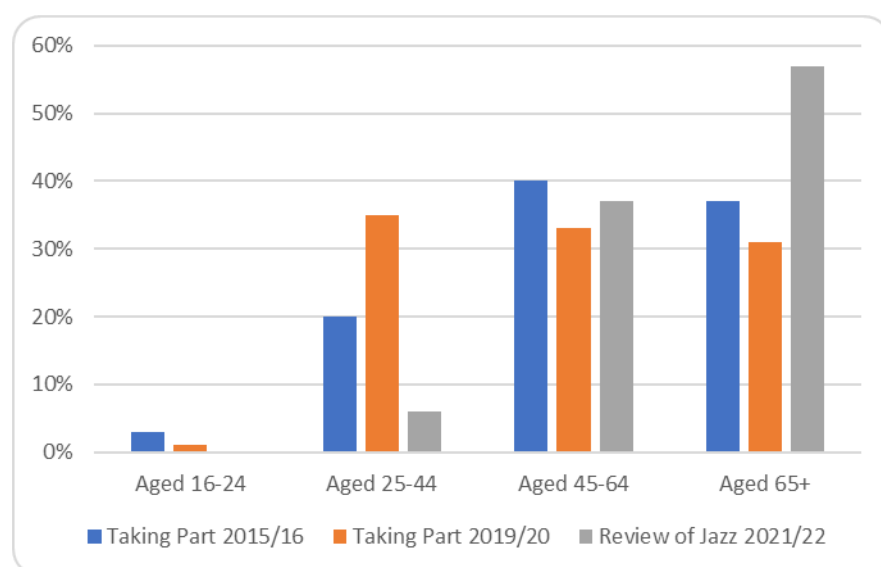


Figure 8

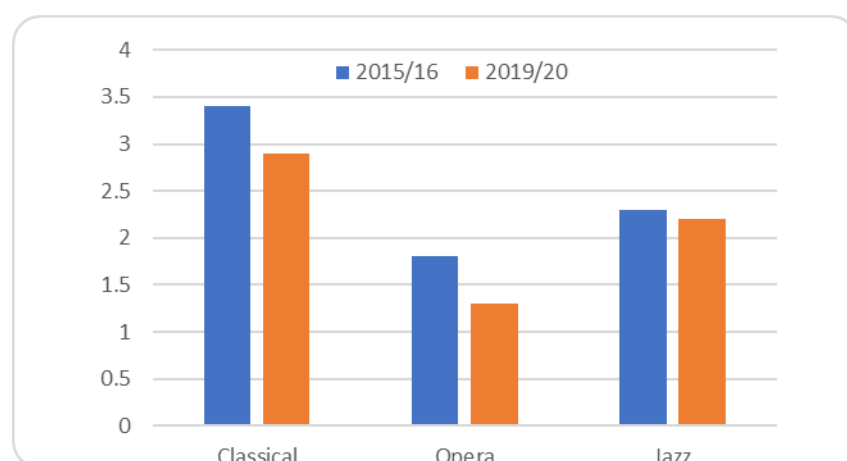


Figure 9

Figure 9 shows attendance in terms of the adult population of England from the *Taking Part* Surveys for 2015/16 and 2019/20. ⁴⁹⁵⁰ The audience for classical music declined from 3.4 million in 2015/16 to 2.9 million in 2019/20. Opera's audience decreased from 1.8million in 2015/16 to 1.3 million in 2019/20. Jazz just about maintained its audience of 2.3 million in 2015/16 to 2.2 million in 2019/20.

7.6 Performances and gender balance

There was a question dealing with the imbalance of gender in terms of, perhaps, too few performances of women bands and musicians at venues, the media and TV.

33% thought the gender imbalance was being addressed
 30% said maybe the imbalance was being addressed
 15% said the gender imbalance was not being addressed
 22% said they did not know

It would appear that one-third of the audience think that the balance is moving in the right direction but two thirds said maybe or no, or did not know.

⁴⁸ Office For National Statistics

⁴⁹ Ibid 6

⁵⁰ Ibid 7

7.7 Access

People who identified as a disabled person, were asked how satisfied they were with the venue the last time they attended a jazz event, and what amenities and facilities were they satisfied with in terms of the venue and access? Figure 10 below shows there is room for improvement in terms of parking, access at venues, staff awareness and the availability of support.

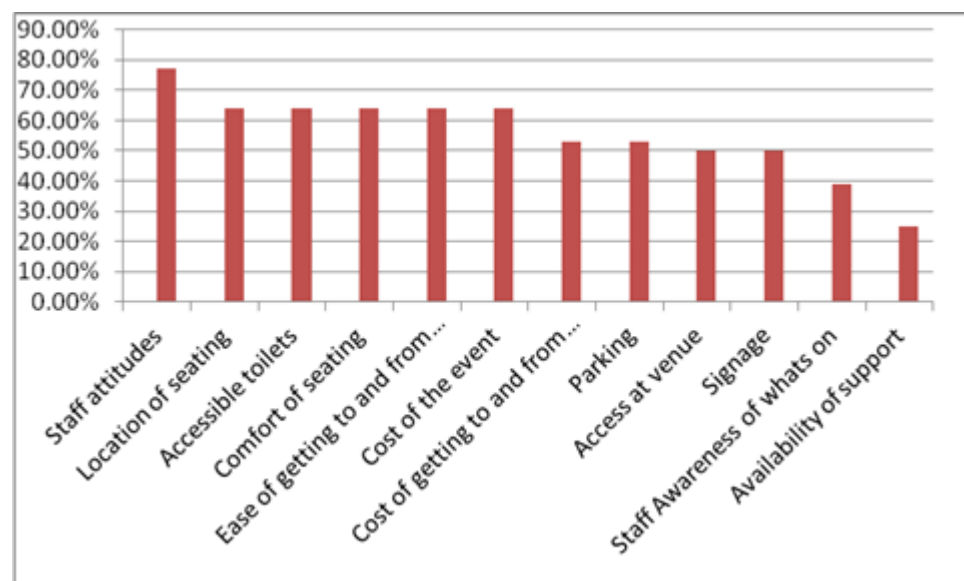


Fig 10

7.8 Media and radio

In terms of listening habits, that is listening to jazz in any format, for example, live, on the radio, television, CD player, streaming, YouTube 76% listened daily and 24% listened weekly.

53% of the sample listened to jazz up to 2 hours per day with 20% listening 2 – 4 hours each day'

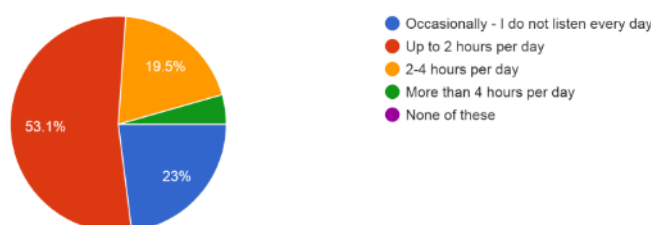


Figure 11

7.9 When do you normally listen to jazz?

All respondents listen to jazz at home and 62% when driving

7.10 Audience overlap

The jazz attendee has eclectic tastes in music. 60% listen to classical music, 50% listen to blues, 40% listen to world music, rock and folk, 20% listen to opera. Understanding audience overlap can help with cross promotion and cooperative ventures.

In terms of audience overlap for jazz: in 2016/17 from the *Taking Part* Survey, the audience was 5% which amounts to 2.3 million adults who listen to jazz in England. 1.8% of the audience for jazz attended a classical music concert producing an overlap of 0.82million adults. The audience for opera in 2016/17 was 3.7% of which 0.8% attended a jazz event. The overlap of opera with jazz is 363K adults.⁵¹

⁵¹ Ibid 6

7.11 Where respondents purchased jazz

40% used online streaming services and Amazon was used by 35% of the respondents. Most still buy CDs or LPs which is perhaps seen as a direct way of remunerating the musicians. 76% of the respondents bought CDs and vinyl from the bands on gigs

7.12 How often the respondents streamed jazz

25% of the respondents streamed jazz at least once a day and 25% streamed jazz at least once every 2 or 3 days. 20% of the respondents do not stream jazz at all.

7.13 Sites used to stream jazz online

64% of the survey used YouTube with 50% using Spotify. The low use of Boiler Room TV and Jazz: refreshed reflects the sample demographic. 1% were aged 20 to 25, no one under the age of 19, and 61% retired.

Comparison: demographics of YouTube users

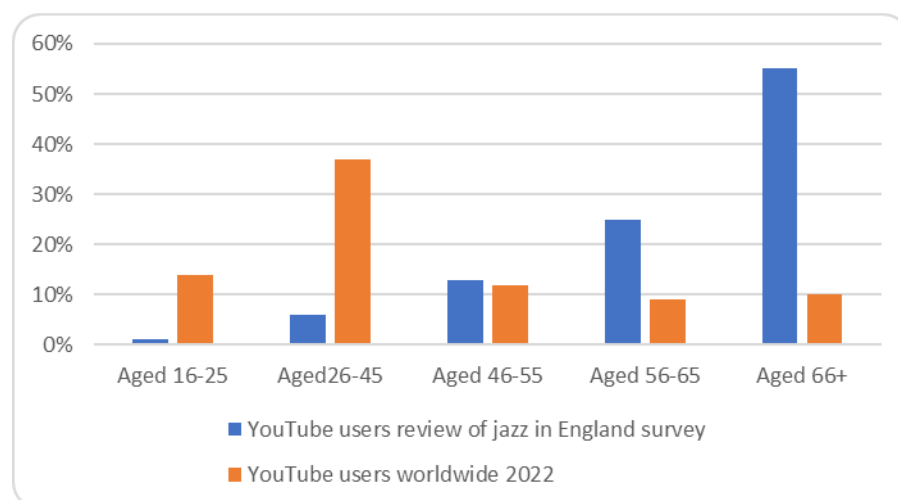


Figure 12

Notes: the figures shown above are based on YouTube's potential advertising reach, and may not correlate with the platform's total number of monthly active users. Rounding in source data may mean that individual figures do not correlate with totals. In particular, the share figures for each age group shown above may not equate to the sum of each gender's share shown in the image below. Advisory: YouTube limits use of its platform to users aged 13 and above, but its advertising tools only publish age and gender data for users aged 18 and above. **Note** that the percentage share figures shown in the list above and in the image below represent the percentage share of the platform's total ad audience— not just share of users aged 18 and above – so figures will not sum to 100%.⁵²

14% of YouTube users worldwide are 20-25 years of age and 37% are in the 26-45 age group, with 19% of YouTube users aged 55+. The 2021 jazz in England survey has a high proportion 80% of the survey of what the marketers call “Baby Boomers” – those born between 1946 and 1964 and “Seniors” born in 1955 or earlier. This highlights the fact that:

While previous generations turned to their children or grandchildren to learn about new technology, Baby Boomers and Seniors are turning to YouTube. In fact, Seniors are the fastest growing segment on YouTube mobile. And as Boomers and Seniors continue to be increasingly active online – spending 27 hours per week – marketers need to learn how best to connect with this valuable audience.⁵³

²⁶ <https://datareportal.com/essential-youtube-stats>

⁵³ <https://www.comingofage.com/blog/baby-boomers-and-seniors-on-youtube-what-marketers-need-to-know/>

7.14 Radio

Radio is a favourite way of listening to jazz with 78% of the survey listening to the radio of which 21% listened to the radio 1–3 hours every day. The BBC was the most popular followed by Jazz FM. Internet radio stations were not used although Jazz London Radio was listened to by 9.4% of the sample.

7.15 Radio stations and programmes listened to

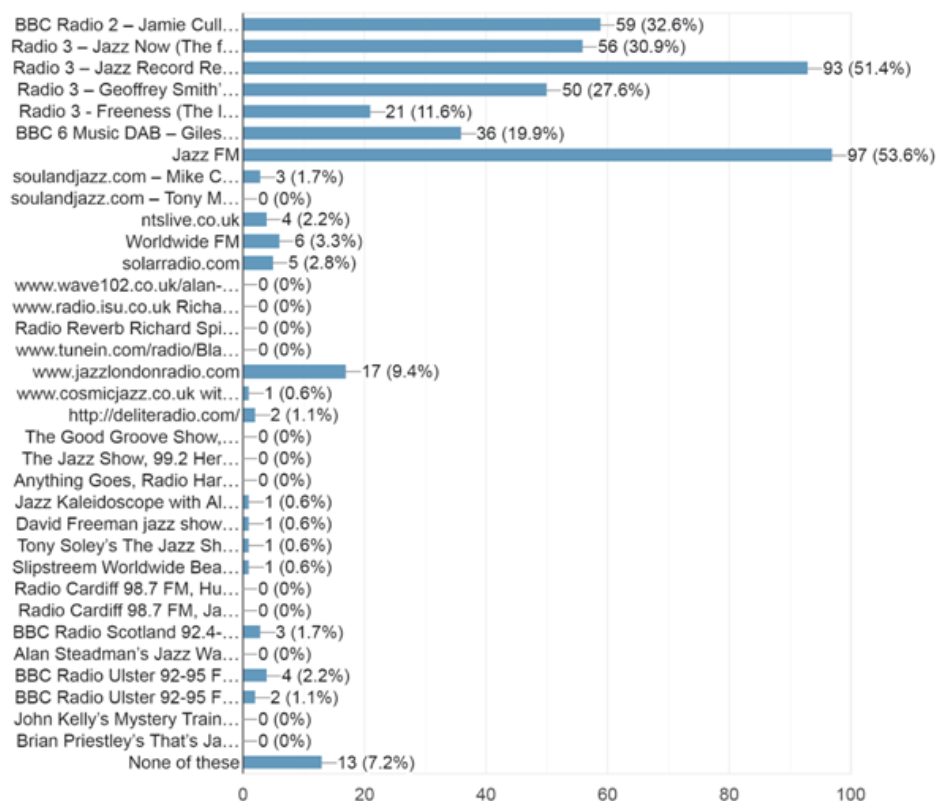


Figure 13

People who rarely listen to jazz on the radio gave the following reasons:

- 60% prefer to listen to jazz that they select
- 46% found it hard to find a radio station with jazz that they like
- 43% not enough jazz to their taste is played
- 30% said that not enough jazz is played

7.16 Use of radio apps

The low usage of internet radio can be accounted for by the fact that 61% of the sample did not use a radio app such as TuneIn or Radio player

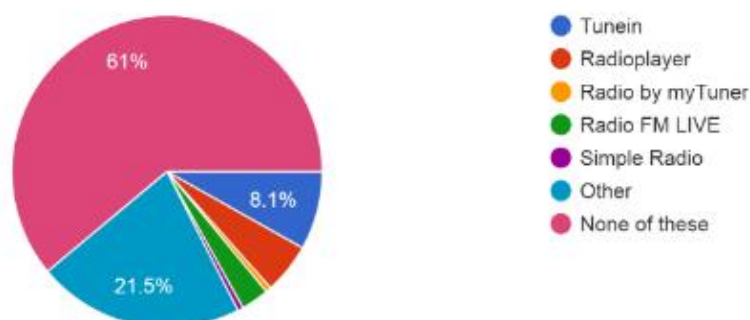


Figure 14

7.18 Live gigs

Respondents were asked how often they went to a gig in 2019 before lockdown

- 20% of the respondents said they went at least once a week
- 45% went at least once a month
- 23% went every two or three months
- 4% every 6 months and 4% once a year

7.19 The respondents were asked to list the three most important channels on which they heard about gigs.

- 69% were informed by emails from jazz clubs
- 49% cited social media
- 38% heard about gigs from musicians and bands mailshots

7.20 Where people bought tickets

The Respondents were asked where they bought a ticket for their most recent jazz event.

- 64% purchased their ticket directly from the promoter
- 37% said they bought a ticket on the door
- 31% bought tickets from online ticket sites such as Eventbrite or WeGotTickets

7.21 The price respondents paid for tickets

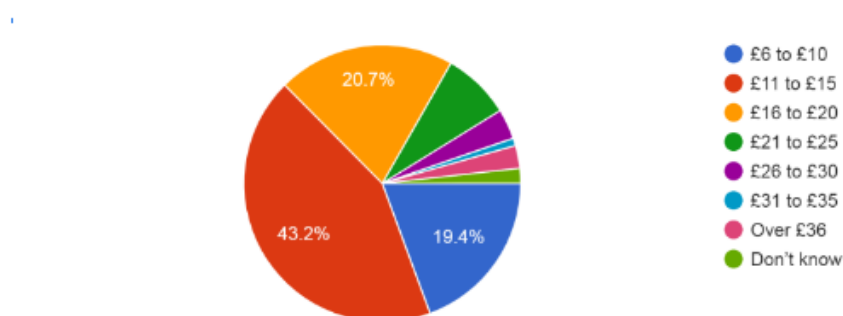


Figure 15

64% of respondents paid between £6 and £15 for a ticket with 29% paying between £16 and £25 and 7% paying over £26 for a ticket. The average ticket price for Grass Roots Venues is £11.42 in 2023.⁵⁴

7.22 General comments from respondents

There are some heartfelt comments about how Trad/New Orleans jazz has not been included, nor the magazines that promote these styles of jazz.

⁵⁴ [Music Venue Trust Annual Report 2023](#)

Appendix 8 - The musicians' questionnaire

8.1 Conclusions

168 musicians responded, of which two-thirds work full-time in music. In addition to performance, time is spent composing and teaching, and some do business support work such as promotion, production, and recording.

Around two-thirds have worked as musicians for more than 20 years but it is not clear if respondents to the questionnaire correctly represent the age profile of jazz musicians in England. Most belong to some sort of organisation such as the Musicians Union, but over half have no professional assistance with their career.

Musicians perform at a variety of venues, but many (pubs and clubs for example), can only accommodate limited numbers, and probably do not guarantee a fixed fee. Larger venues such as theatres, art centres and festivals should provide contractual agreements with an agreed fee.

Compared with salaries in general, and even salaries in the music industry, jazz musicians report very low earnings, with only 14% receiving more than £30K. 50% earn less than £15K annually which is less than a year's work at the National Living Wage of £23,795. This is reflected in the fact that over 60% are not saving for a pension. In addition, work in the EU is reducing because of the extra difficulties due to Brexit. Income from streaming (Spotify etc.) is pitiful (<£100) for all but one or two individuals while selling CDs at gigs is still the best way of making income from recordings.

About three-quarters have their own website and many used social media. Mainstream media (radio, TV and newspapers) coverage is reducing with most programmes on radio or TV dealing with historical music.

The effect of Covid has been devastating with hundreds of gigs cancelled thus cutting off funding both from performance and sale of CDs at gigs. While some musicians have been able to secure a measure of support from HMRC, others seemed not to have been aware of whatever, generally meagre, help that was available. 17% took up other work unrelated to music during the pandemic.

Business training for musicians at college or via professional organisations seems patchy with just under half not having received any such training.

Musicians in the industry are concentrated in London and the South-east. They are predominantly white British, male and middle-aged. Only 39% feel that the gender imbalance is being addressed. Few are aware of the Arts Council initiative called Let's Create.

8.2 Regional spread of the musicians surveyed

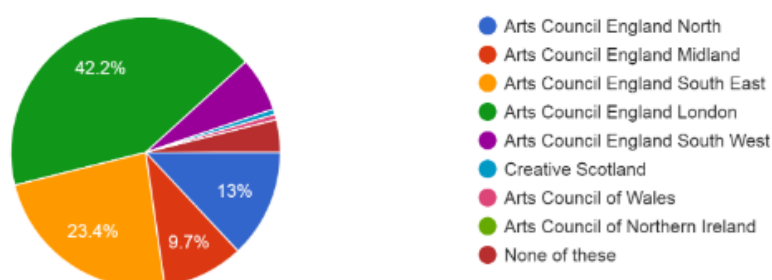


Figure 16

Using the Arts Council England's area map, London provided 42% of the respondents with the South East on 23%, the North at 13%, the Midlands at 10% and the South West at 7%. Overall, 58% of the respondents lived outside of London.

8.3 Awareness of the Arts Council England's 10-year strategy "Let's Create" and the delivery plan

One question was whether respondents were aware of, or had read, the Arts Council of England's 10-year strategy *Let's Create - 2020-2030* and: *Our Delivery Plan 2021-2024*.

The results were disappointing. 12% of the respondents were aware of *Let's Create*. Only 6% had actually read the document. 7% of the survey were aware of the delivery plan and only 4% of the survey had read it.

8.4 Demographics

There were 168 responses to the musician's questionnaire. 80% of the survey respondents were male, with 18% female and 2% who self-described or preferred not to say.

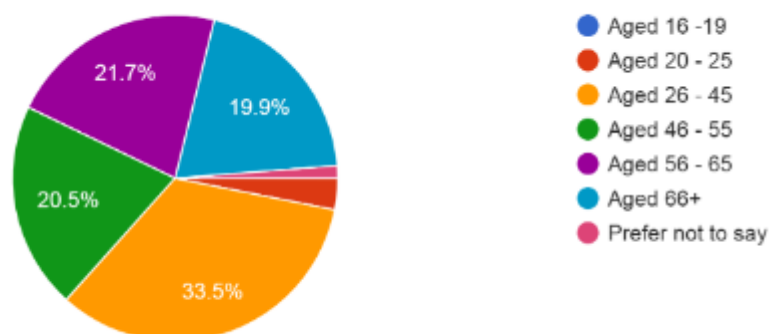


Figure 17: Age of respondents

There were no respondents under the age 19.3% of the survey was aged 20-25, 34% were aged between 26 and 45 years, 21% aged between 46 and 55, 22% were in the 56 to 65 age bracket and 20% were aged over 66.

Comparison of the Value of Jazz in Britain for 2005, 2008 and 2021

Age Group	Value of Jazz 2005	Value of Jazz 2008	Review of Jazz 2021
Under 26	3%	2%	3%
26-45	35%	29%	34%
46-55	22%	25%	21%
56-65	22%	22%	22%
66+	18%	19%	20%

Table 11

Comparing the three years of the Value of Jazz II⁵⁵ for 2005, 2008 and the *Review of Jazz* survey for 2021, the age groupings have remained the same.

80% of the respondents were male with 18% female. In the Value of Jazz Britain research (2008) 17% of those returning the questionnaire were female, compared with 14% in 2005.⁵⁶

8.5 Gender imbalance

This question asked if the imbalance of gender is being addressed

- 39% thought the gender imbalance was being addressed
- 31% said maybe the imbalance was being addressed
- 18% said the gender imbalance was not being addressed
- 12% said they did not know

⁵⁵ Value Of Jazz In Britain 2010 p33

⁵⁶ Ibid 25 p32

It would appear that two-thirds of musicians think that the balance is moving in the right direction but a third said no, or did not know.

8.6 Diversity of respondents

86% of the respondents were white

6% preferred not to say

8% were of an ethnic background

Compared to *The Value of Jazz II* there has been a small increase in the numbers of musicians from diverse backgrounds.

Comparison of the Value of Jazz in Britain for 2005, 2008 and 2021

Ethnicity	Value of Jazz 2005	Value of Jazz 2008	Review of Jazz 2021
White British	88%	88%	86%
White other	7%	7.5%	-
Other ethnicity	5%	4.5%	8%
Preferred not to say	-	-	

Table 12

In terms of **disability status** 8.2% identified as a disabled person.

Respondents identifying as a disabled person were asked how satisfied they were with the following amenities and facilities in terms of the last venue they either played in, or attended:

- Availability of support 30%
- Signage 30%
- Staff awareness of what's on 30%
- Access at venue 50%
- Accessible toilets 50%
- Comfort of seating 50%
- Cost of getting to and from the venue 50%
- Staff Attitudes 60%
- Cost of the event 60%
- Location of seating 60%
- Ease of getting to and from the venue 60%
- Parking 60%

There is clearly room for improvement.

8.7 Careers of Musicians

The predominant occupations are performance, composing and teaching. Other significant activities include workshop leading, producing, promoting, recording and agency. Almost none run a venue.

8.8 Employment of musicians

- 53% were self-employed full time
- 11% were self-employed part time
- 8% were employed full time
- 12% were employed part time
- 12% were retired
- 4% did not say, were unemployed, or in full time education

61% of the respondents had been employed full time in music for at least 20 years

8.8.1 Membership of trade bodies

60% of respondents were members of the Musicians' Union with 56% members of PRS and only 50% are members of the PPL. The Musicians' Movement had 11%, The Ivors Academy 7%, the ISM 5% and the Jazz Promotion Network only 4%.

8.9 Professional support

Respondents were asked if they employed professional support such as managers, accountants, booking agents. Did they have marketing and PR support, or record labels and music publishers?

32% had an accountant, 21% had a record label. None of the other categories reached past 10% and 52% did not have professional help of any of the stated types.

8.10 Publications read by musicians

The popular journals read by musicians were *Jazzwise*, read by 41%, *Jazz London News* (40%) *Jazz Journal* (16%), *Just Jazz* (9%) and *Jazz Rag* (8%)

The most popular blogs were bebopspokenhere ([bebop spoken here](#)) and Jazzfuel ([Jazzfuel - Your Resource For All Things Jazz](#)), each read by 15% of the respondents. 11% read *The Jazz Mann* (thejazzman.com) and 12% read *Sandy Brown Jazz* (sandybrownjazz.co.uk). 30% of respondents did not read a blog or magazine at all.

8.11 Number of Jazz gigs in 2019

76% of respondents played between 1 and 99 gigs per year. 20% played between 100 and 149 gigs per year, with 9% playing up to 199 gigs per year.

8.12 The types of venues where jazz gigs were played

In terms of work undertaken, 74% of respondents worked in jazz clubs. This was closely followed by pubs at 68%, arts centres at 63%, theatres and concert halls at 60%, jazz festivals 55% and music festivals, 37%

In the *Value of Jazz In Britain surveys I and II*, 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%).⁵⁷

In terms of venues and work nothing much has changed. Musicians continue to be heavily reliant on small jazz clubs run by mainly voluntary organisers.

8.13 The venues where musicians played most often

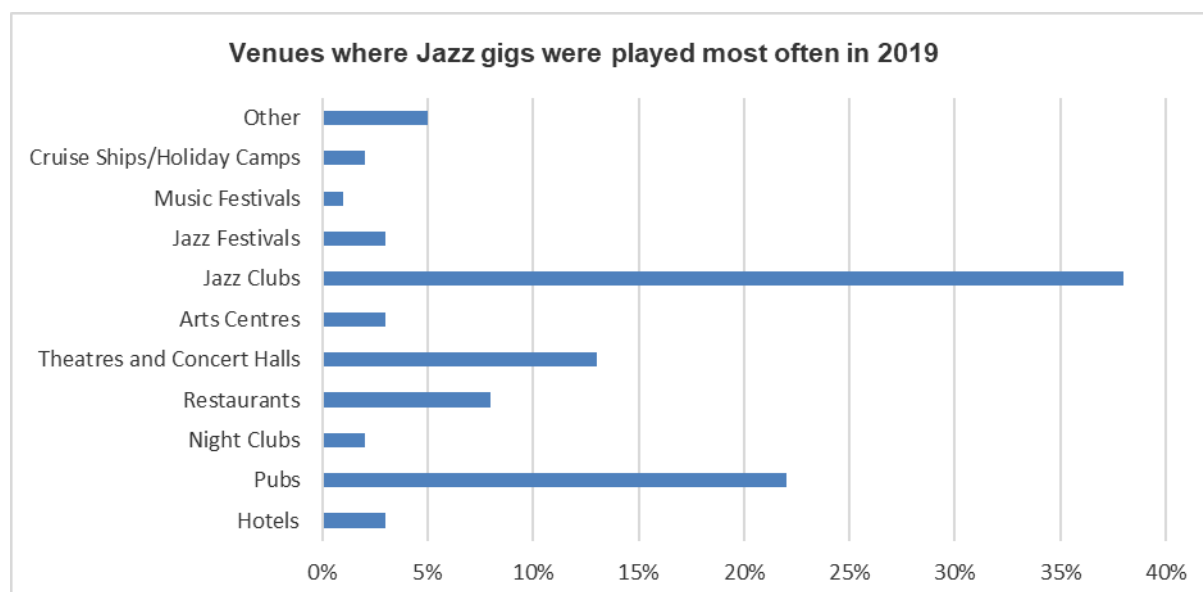


Figure 18

⁵⁷ Ibid 25 p32

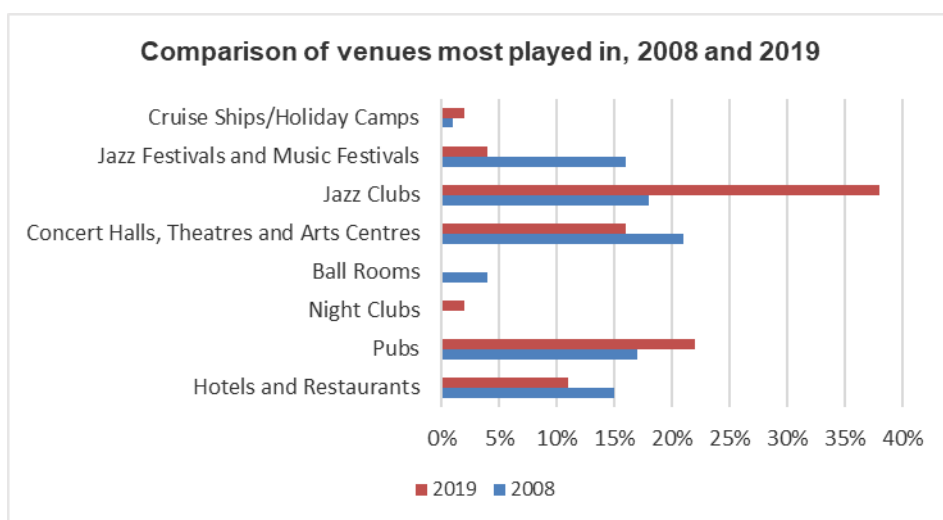


Figure 19

Venues most played in in 2019 were jazz clubs (38%) and pubs (22%). Compared to the *Value of Jazz In Britain* survey in 2008, the use of pubs and jazz clubs has increased and performance in jazz festivals and music festivals have declined

8.14 Recording sessions undertaken in 2019 (January to December)

34% of the respondents did no recording sessions in 2019, with 52% of musicians undertaking between 1-9 recording sessions, 8% undertaking between 10 – 19 sessions.

8.15 The type of contract mostly used by promoters in 2019 (January to December)

Figure 23 below has respondents reporting that 56% of promoters issued no contract, and 48% confirmed by email. Just over 10% used a Musicians' Union Contract.

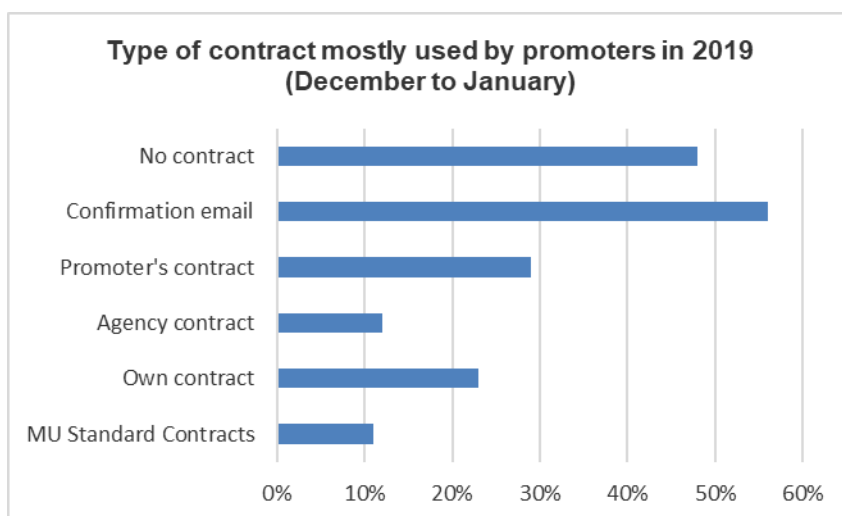


Figure 20

8.16 How musicians are being paid

19% say they are being paid the minimum Musicians' Union (MU) gig rate – (Minimum recommended rates per musician for casual engagements for groups performing in pubs and clubs of up to 3 hours: £128)

35% said they were being paid more than the minimum MU gig rate with 70% saying they were getting less than the MU gig rate. 12% were on a 100% of the door take and 46% on door splits.

8.17 How often do musicians have difficulties in being paid at least the appropriate MU rate for your jazz gigs?

30% of musicians said they received the minimum gig rate all the time, 34% said fairly often, 16% received minimum gig rate infrequently with 11% saying never and curiously 9 % said they did not know.

8.18 In 2019 (December to January) did you turn down any jazz gigs because the rates were not sufficient?

47% of respondents turned down gigs occasionally with 13% saying they often turned down gigs. 35% did not turn gigs down.

8.19 Musicians earnings in 2020 (Year ending 5 April 2020)

(These figures include all music-related sources of income, such as teaching, library music, royalties)

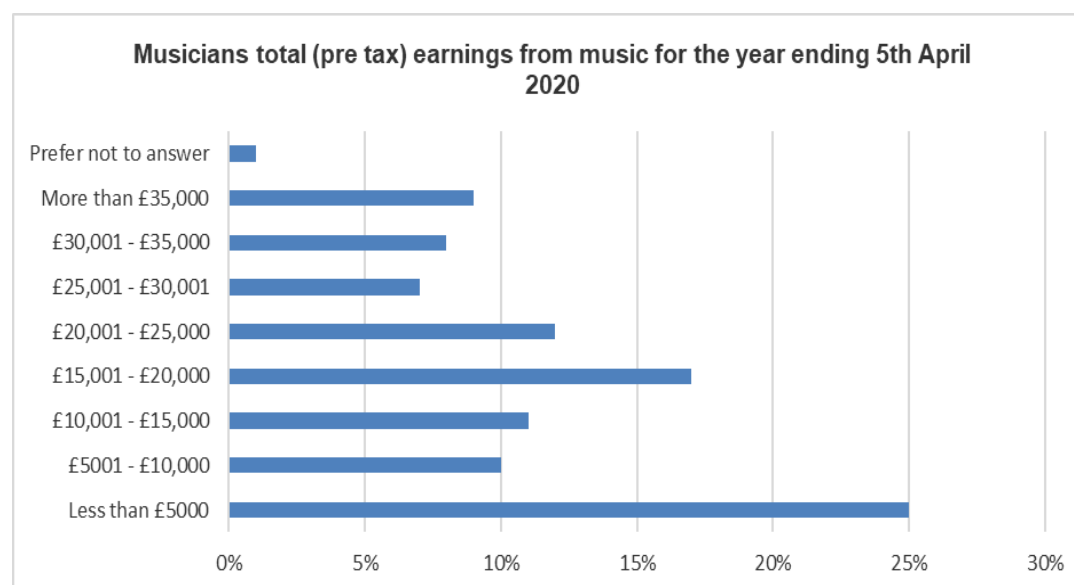


Figure 21

64% of respondents earned less than £20,000 per annum. 19% of musicians earned between £21,000 and £30,000, 8% up to £35,000 and 9% more than £35,000 each year.

The Office of National Statistics yearly survey for 2020 showed the average UK salary was £38,600 for full-time employees (the median salary was £31,461). - 82% of musicians in this survey earned less than the UK median salary.

Musicians' annual earnings from music (% of musicians)

Annual Earnings	2005 %	2008 %	2019 %
Less than £5000	33.9	30.6	25
£5001-10000	18.9	21.3	10
£10001-15000	15.0	11.4	11
£15001-20000	11.0	9.9	17
£20001-25000	6.1	7.3	12
£25001-30000	6.3	5.8	7
£30001-35000	3.3	3.5	9
More than £35000	-	-	9

Table 13

In 2005 78.8% of musicians earned below £20,000 which had decreased to 3.2% in 2008 and decreased further to 63% in 2019. Earnings in the range £21,000 to £30,000 were attained by 12.4% in 2005 increasing to 13.1% to £25% in 2019. This looks encouraging. However, if you adjust the figures for inflation (for example, £20,000 in 2005 would be worth £31,351 in today's terms) musicians' pay has not improved over the years.

47% of musicians received income that was not related to music activity.

When asked about membership of a pension scheme 20% were in a personal pension scheme, 26% were in an employer pension scheme and 61% had no pension scheme at all.

Respondents were asked if had ever received financial support from family or friends to support their professional career in the music industry? (Other than during education and not from funding organisations). 6% of musicians received support on an ongoing basis, 22% had received support on several occasions and 37% had been helped once or twice. 35% of respondents chose not to answer.

Musicians were asked if they had used crowd funding sites with only 8% saying they had used them. 92% of musicians had not used a crowd funding site.

8.20 Working abroad

There has been a decline in musicians, in this survey, working abroad from 53% in 2017 to 46% in 2019. 40% of musicians did not work abroad in any of these years.

98% of musicians worked in the EU. 31% worked in Europe but outside the EU with 26% of musicians working in the USA. 15% of musicians worked in the Middle East, with 10% in Canada, 9% in Africa and 6% in Japan

14% of respondents employed a manager or booking agent to secure work abroad. 21% did all the booking themselves, 32% of work secured abroad was by the efforts of a band member and 34% used other means of securing work abroad.

8.20.1 Musicians were asked whether, if they planned on touring the EU in 2022, they would have a manager to undertake the necessary fixing the bookings and completing all the paperwork and associated task.

- 87% of respondents said that they would not have a manager.

8.20.2 Respondents were asked how they would cope with the new rules regarding touring in the EU.

- 80% of respondents were very confident
- Over 30% were fairly confident

8.20.3 Musicians were asked how confident they would be with the paperwork involved in travel, Public Liability Insurance requirements, and so on. 20% were very confident, with 45% fairly confident.

With work permits

- Only 6% were very confident
- 18% fairly confident
- 76% of respondents were not confident or did not know.

Musical Instrument Certificate (MIC) If your instrument is subject to endangered species regulations.

- Only 30% of respondents were confident in this area

The ATA Carnet acts as a passport for goods. It simplifies the custom formalities by allowing a single document to be used for clearing goods through customs in the countries that are part of the ATA Carnet system. An ATA Carnet is valid for 1 year and allows for movement of the goods shown on the Carnet as many times as required during the 12 months to any of the destinations applied for.

The cost, for a 24 hour service, is £310 + VAT. London Chamber of Commerce and Industry Members can benefit from the discounted rate of £185.00 + VAT. ATA Carnets can only be purchased in the UK from the London Chamber of Commerce and Industry and the Authorised Chamber Network.

- 79% of respondents were not confident or did not know.

If you are taking a hired vehicle abroad you will need a VE103 vehicle on hire certificate to show that you are allowed to use a hired or leased vehicle abroad. The fee is £8

- 87% of respondents were not confident or did not know.

Musicians may need an Economic Operators Registration and Identification number (EORI number) if they move goods between the UK and the EU. For example, merchandise CDs etc.

- 87% of respondents were not confident or did not know.

8.21 Sponsorship and funding from charitable trusts and foundations

Applications to Arts Council England for National Lottery Funding show a 50% success rate for 2018 and 2020 amongst the 5% to 8% of respondents who applied.

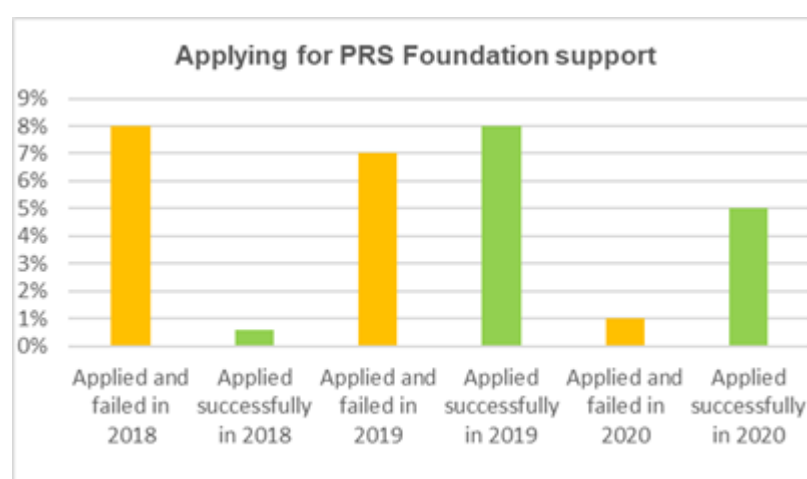


Figure 22

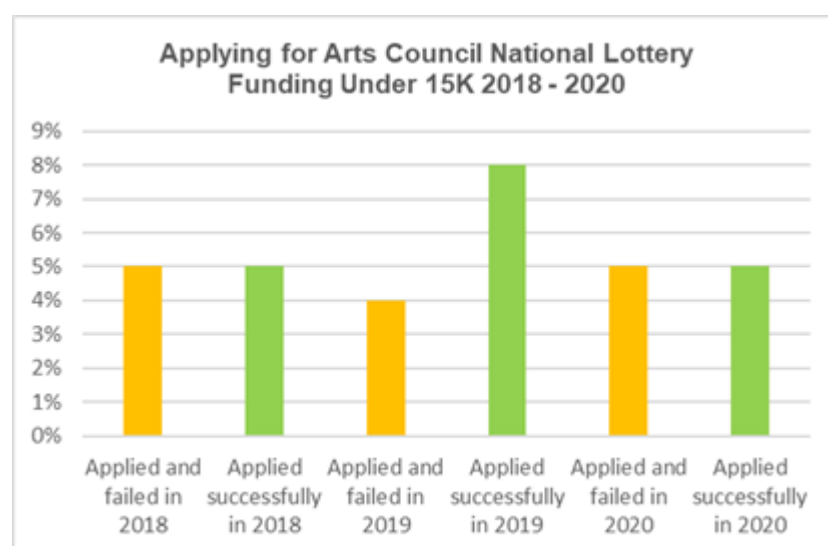


Figure 23

Of the respondents who applied to the PRS Foundation 7% applied and failed in 2019 and 8% succeeded. In 2020 1% failed and 5% succeeded.

Overall, the number of applicants was low.

8.22 Respondents were asked: How confident do you feel about your ability to fill in funding applications from each of the following organisations?

Applying for National Lottery funding (under £15K) from Arts Council England, 38% were confident or fairly confident, and applying for funding over £15k, 25% were confident or fairly confident. Concerning other sources of funds, Help Musicians UK, British Council, PRS Foundation, sponsorship and other foundations, trusts, local authorities and crowdfunding, the confidence factors were all below 25%.

8.23 Online presence

73 % of respondents had a website dedicated to jazz and 27% did not have a website. As regards social media accounts used by respondents, apart from Facebook at 90%, YouTube use was 65%, and Bandcamp was just over 40%

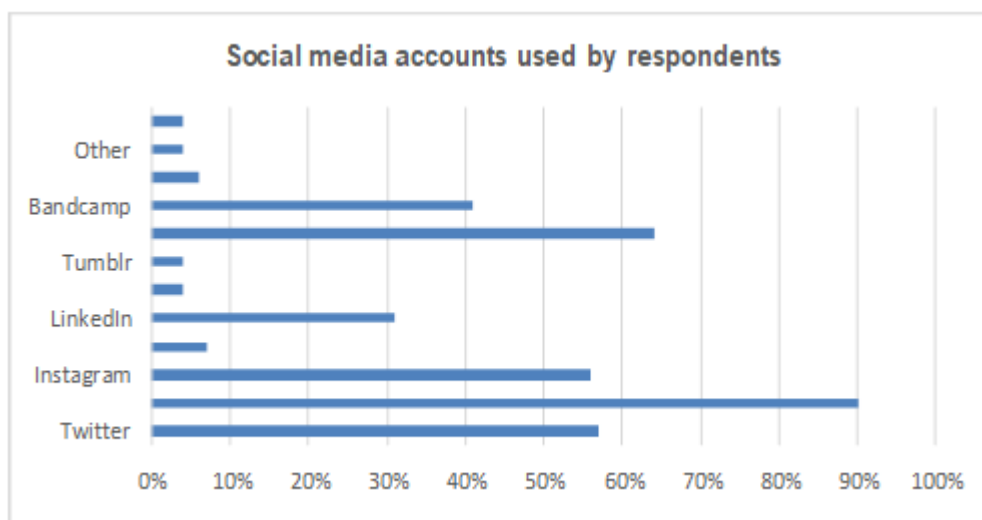


Figure 24

Frequency of usage of social media sites by respondents was low: 5% used social media two or three times a day, 9% every day, and 26% 2 or 3 times a week.

There were questions concerning coverage of jazz in the media:

- 82% felt that jazz was not adequately covered in the media.
- 77% of respondents felt that jazz coverage in the media did not deal adequately with active players on the UK jazz scene as compared to coverage about the past.
- 57% of the sample thought that media interest is generally focused too much on cross-over or jazz-influenced genres. 21% said no, and 22% did not know.
- Respondents were also asked if they had knowledge of the jazz scene or musicians in Scotland, Wales and Northern Ireland 57% said no and 10% did not know

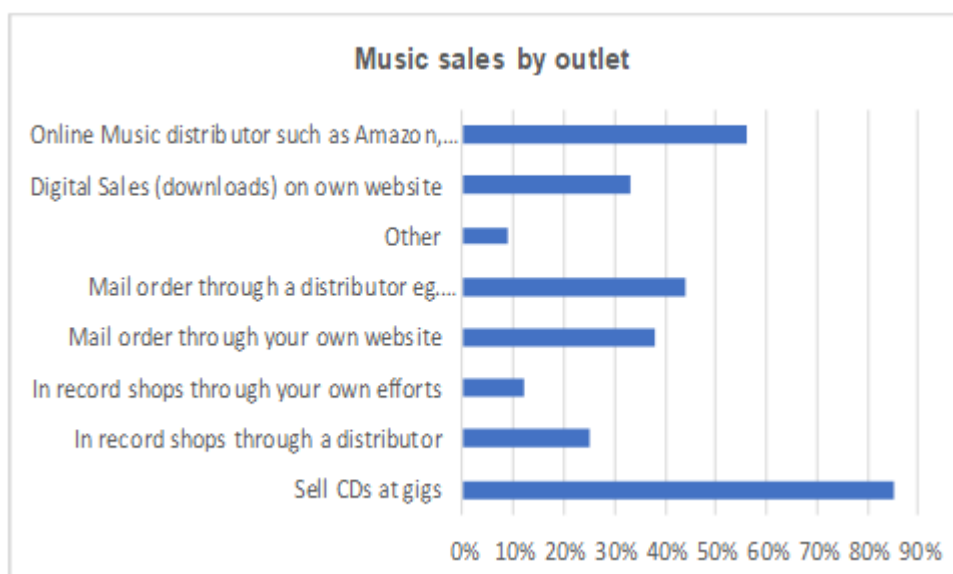


Figure 25

CDs at gigs are still the most popular way to sell recordings with 85% of respondents selling CDs on gigs.

54% of respondents had their music available via dedicated music streaming services such as Spotify, Apple Music, Tidal and Deezer.

Income from streaming using dedicated music streaming services was low. 30% of respondents earned £0 - £10. 8% earned £11 - £50, and 49% of the sample did not stream their music.

8.25 Training and education

1.3% of the respondents attended a Further Education music course with 46.7 attending a Higher Education music course. 52% of respondents attended no formal music course

In terms of business training at music college:

- 44.9% said that business training consisted of ad hoc lectures and visits from musicians and music industry representatives.
- 20.7% had no training
- 7.29% said training took place in the final year
- 5.8% had training the full length of the course

With regard to the importance of music business training, respondents were asked if the college stressed the importance of the business module. 22.9% of the respondents said yes with 77.1% saying no.

Figure 26 below shows the attendance at workshops run by trade organisations

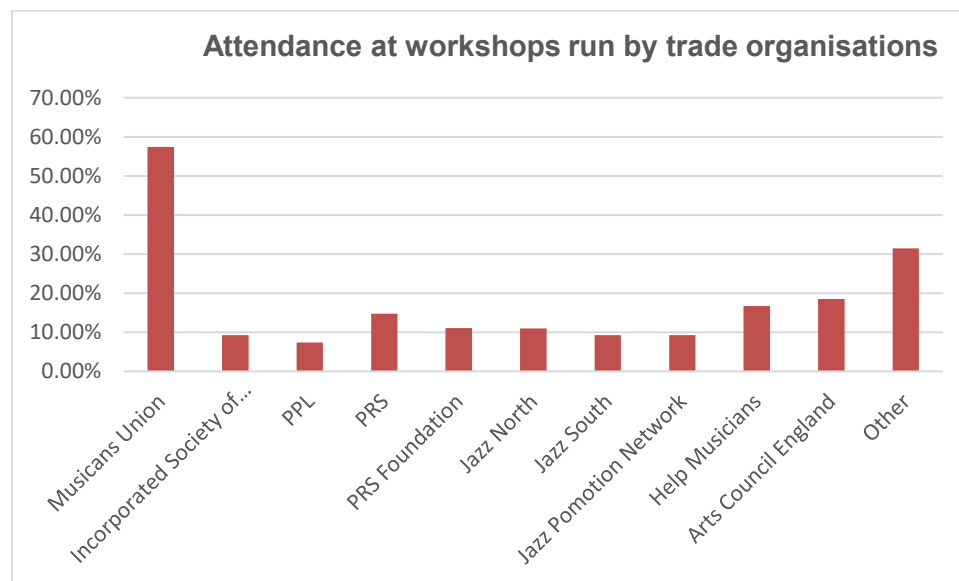


Fig 26

Appendix 9 - Promoters and Venues

9.1 Conclusions

52 promoters responded to the questionnaire. 80% of the promoters were aged over 55 with 805 of the promoters being male. 97% of the promoters were white. 90% of respondents lived outside London.

The Arts Council is the major funder for projects and tours, so it was disappointing to see that only 27% of the respondents had read the Arts Council England's 10-year strategy *Let's Create*, and only 18% of the survey had read the delivery plan.

79% of promoters funding came from box office, with a sharp reduction in Local Authority, Arts Council, PRS Foundation and Sponsorship funding. Ticket prices are low with 45% of respondents charging between £7 and £10.

All the indications are of an aging audience amongst respondents. 80% of promoters were booking six months or longer ahead. The overwhelming criterion for booking the bands was musical excellence (88%). 31% of promoters booked 21%-40% of women led bands.

There is still unsatisfactory provision of pianos at gigs. Only 40% promoters have access to a good grand piano and 26% of promoters have no piano or keyboards at all. This is down from 44% of promoters with good pianos in a Jazz Services survey in 2011/12.⁵⁸

95% of promoters surveyed promote between 20 and 150 gigs per annum. 60% of venues had no tangible agreement within their landlords. This is highly unsatisfactory. 82% of promoters used venues with a capacity of 200 people or less.

In terms of building audiences and security of tenure there needs to be a considerable increase in the ability of jazz promoters, especially volunteer jazz promoters, to own and control their own venues.

9.2 Ability to make long term plans

60% of respondents were able to make long term plans with 40% saying no

9.3 Experience of promoting

Promoters were asked how long they had been promoting. 14% had been promoting between 1 – 5 years, 22% from 6 – 10 years. 44% had been promoting music between 11 and 35 years, and the rest more than 36 years.

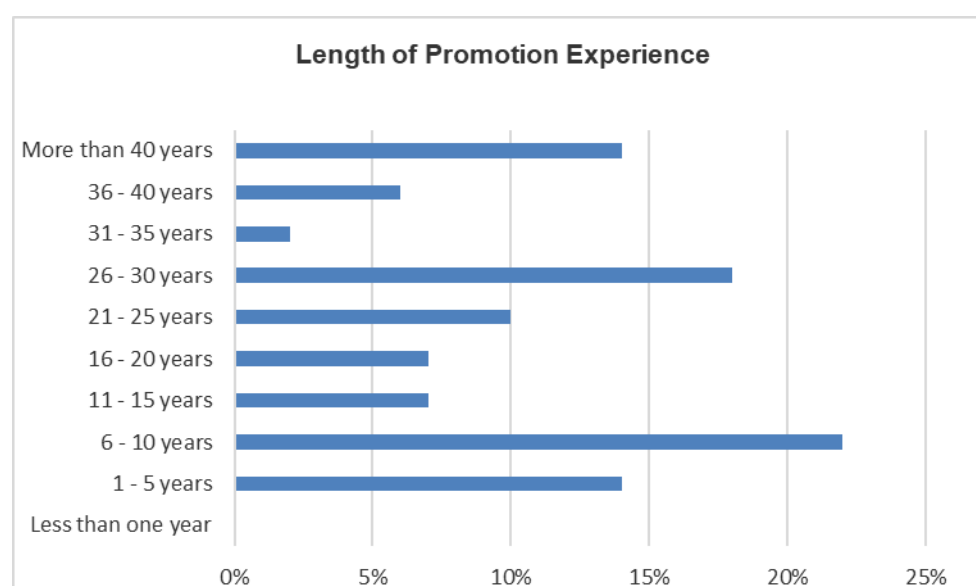


Figure 27

⁵⁸ Cold Comfort And Home Truths: Informing The Review of Jazz In England p40

9.4 Administrative Structure of Promoters

34% of promoters were sole traders, 24% were registered charities and 18% were community interest companies. 20% were commercial companies.

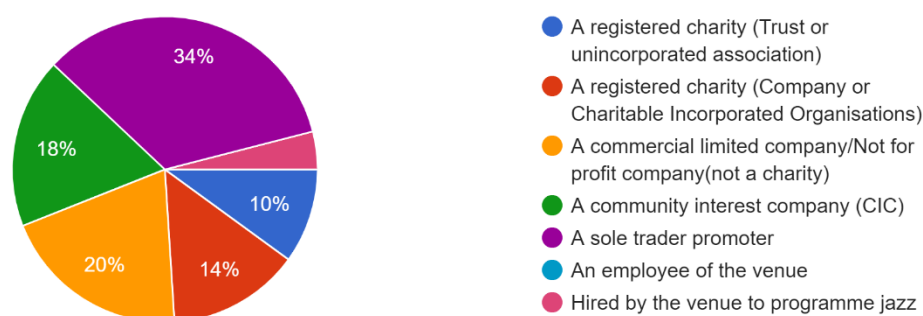


Figure 28

9.5 Venues regularly used by independent and volunteer promoters

Promoters use a wide range of venues 30% of events take place in pubs, and 20% of promoters use jazz clubs and dedicated music venues.

9.6 Who owns the venues promoters use?

The diversity of venue ownership is wide 30% are owned by drinks companies, brewers, private landlords and business groups. 4% are owned by individuals with 13% run in partnership. Local authorities and charities such as arts centres account for 28% of premises with 25% being owned by "other". In terms of building audiences and security of tenure there needs to be a seismic shift in the ability of jazz promoters and especially the volunteer jazz promoter to own and control their own venues

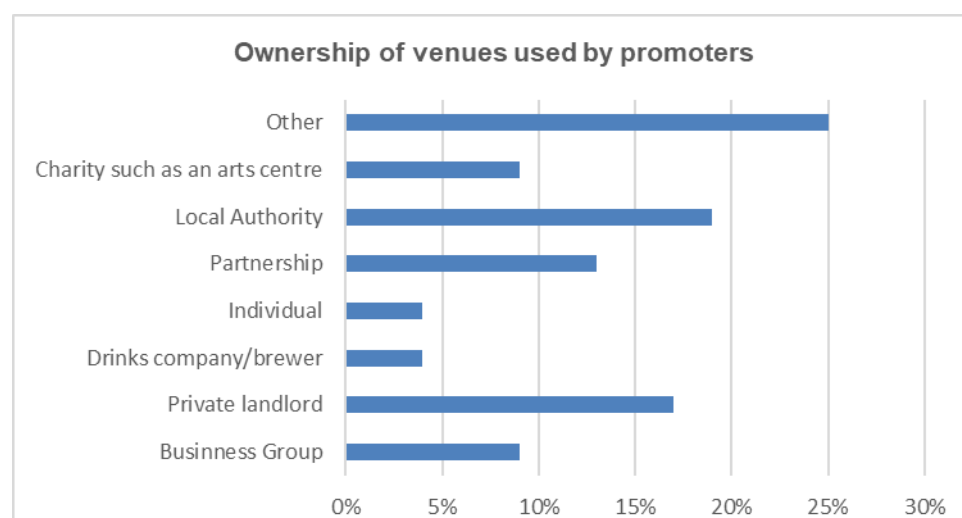


Figure 29

9.7 If you are responding as a venue what sort of tenancy agreement do you have?

40% of the survey responded as venues.

- 40% of the respondents had no agreement
- 25% had another kind of agreement
- 15% of venues had an aural agreement
- 15% of venues had a fixed term tenancy
- 5% did not know

60% of venues had no tangible agreement within their landlords. This is highly unsatisfactory.

9.8 The capacity of the venues promoters used

82% of promoters used venues with a capacity of 200 people or less

9.9 Level of accessibility to venues for disabled people.

- 27% of respondents said their venue was accessible to people with hearing impairment through the provision of audio enhancements, such as induction loop or intra red systems
- 78% of respondents reported that their venue had level access in to the venue, such as being step free, using permanent or temporary ramps or lifts
- 90% of respondents said that their venue or event had an accessible toilet

9.10 Diversity of promoters

97% of promoters were white with 3% coming from other backgrounds

9.11 Frequency of promoting

- 30% of respondents promoted on a monthly basis
- 16% ran fortnightly events
- 26% promoted weekly
- 8% promoted every night
- 20% of promoters ran occasional events

9.12 Number of gigs promoted each year

95% of the promoters surveyed promote between 20 and 150 gigs per annum

9.13 Provision by promoters of ancillary services

Less than 25% provide recording facilities or rehearsal rooms with 50% of promoters providing a backline.

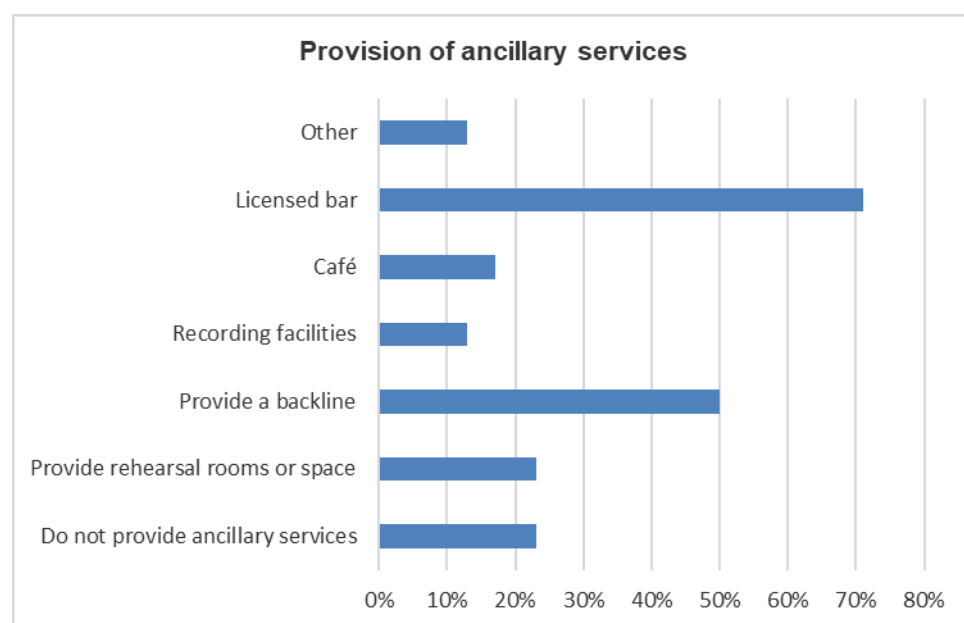


Figure 30

9.14 Provision of pianos

Figure 40 shows the unsatisfactory provision of pianos at gigs, Only 40% promoters have access to a good grand piano and 26% of promoters have no piano or keyboards at all.

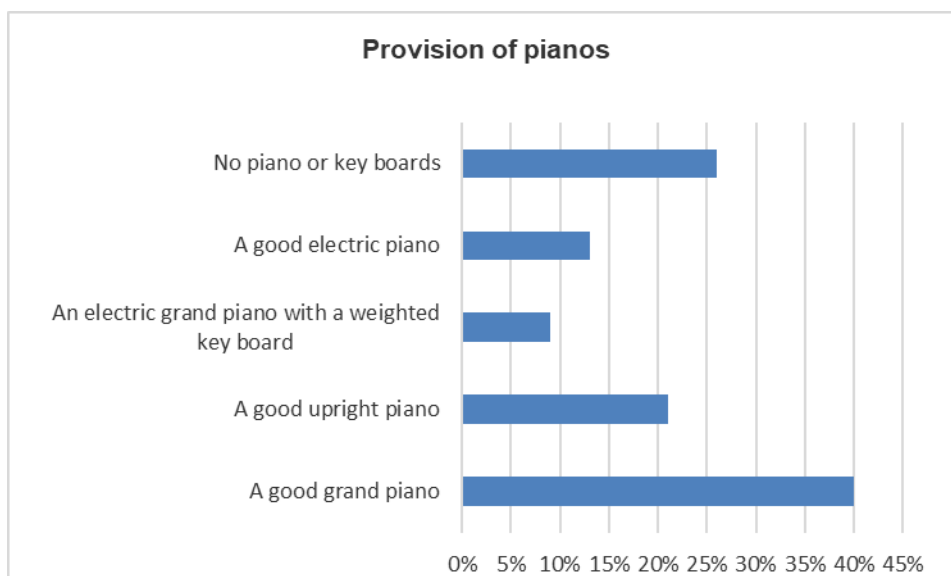


Figure 31

9.15 Genres of jazz promoted

The most promoted genres of jazz were Modern/Bebop (80%) Contemporary (71%) Post-Bop (59%) and bands and musicians from abroad (61%) Please see figure 41

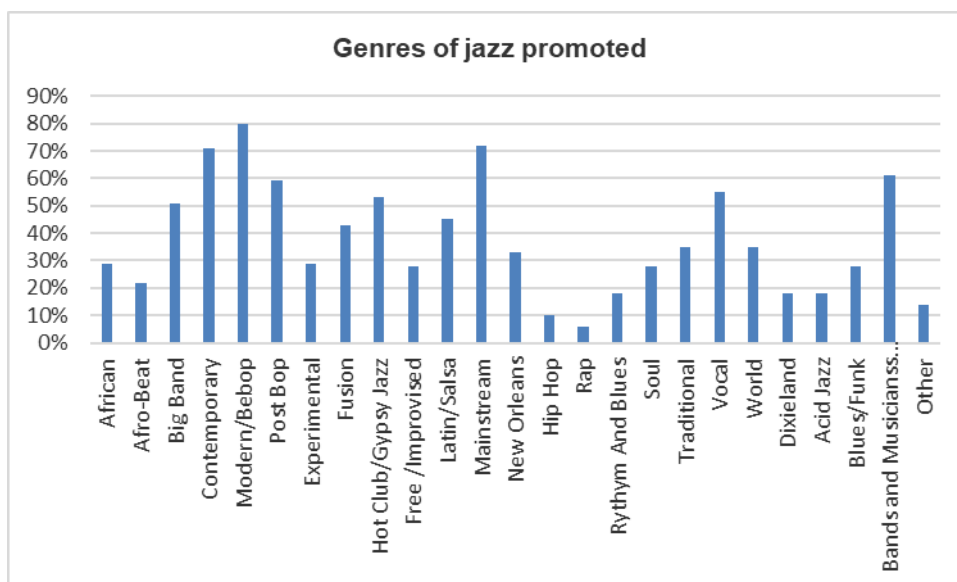


Figure 32

9.16 Promoters and the booking of bands

9.16.1 Booking bands

Promoters were asked how long they booked bands ahead. 80% of promoters booked six months or longer ahead.

- 4% booked two months ahead
- 16% booked three months ahead
- 30% booked six months ahead
- 16% booked nine months ahead
- 30% booked twelve months ahead
- 4% booked eighteen months ahead

9.16.2 Criteria for booking bands

Promoters were asked what were the main criteria they used for booking bands. **The overwhelming criteria was musical excellence (88%).** The fact that the band is well known and has a reputation was a criterion for 57% of responders. Price was a consideration for 30%.

9.16.3 People handling the bookings

86% of promoters had a designated person handling the booking of the bands, and 84% had a person dealing with promotion and marketing of events.

9.16.4 How bands approached promoters

Promoters were approached by bands through the following means:

- 51% approached promoters by telephone
- 96% used email
- 8% by post
- 35% applied in person
- 20% used other means

9.16.5 Promoters also operated the following policies for the bands on gigs

- 44% operated the Musicians' Union Fair Pay policy
- 92% of promoters paid a fee
- 25% operated a door split scheme
- 61% of promoters provided a meal and a drink for the band
- 33% of promoters provided hotel accommodation.
- 24% paid travel expenses on top of the fee.

9.16.6 Promoters and licensing

- 40% of promoters had a PPL license
- 72% had a PRS license

9.16.7 Percentage of the programme featuring women led bands in 2019

- 4% of promoters did not book female led bands
- 23% of respondents booked between 4% – 15% of women led bands
- 29% of promoters booked 16% – 20% of women led bands
- 31% booked 21% - 40% of women led bands

9.16.8 Booking diverse bands

The percentages of promoters booking diverse bands was low and 62% of promoters had not booked any bands led by or including deaf and disabled musicians.

9.17 Effect of Brexit

Promoters were asked if they thought their ability to work in the music industry would be affected by the UK leaving the European Union. 62% of promoters said there would be a negative effect and 26% did not know.

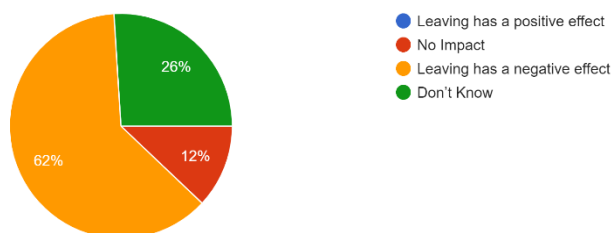


Figure 33

9.18 Sales, marketing and funding

Average audience size in 2019:

- 20% of promoters had an audience size of 0 – 50 attendees
- 22% of promoters had between 51 to 75 attendees
- 31% had between 76 and 100 attendees
- 12% of promoters had audiences of between 101 and 150 attendees
- 15% had audiences above 151 attendees

9.19 The demographic of the audience

47% of promoters reported that 16–19-year-olds accounted for up to 10% of their audiences with 6% of promoters saying 16–19-year-olds accounted for 11-20% of their audiences. 37% of respondents reported audiences aged 26 to 45 years of age. 55% of promoters accounted for audiences of 30% - 60% aged 46 – 55 years. 55% of promoters reported 10% to 40% of audiences were aged 76+ years of age. All the indications are of an ageing audience in the respondent's venues.

9.20 Average ticket price in 2019

45% of respondents charged between £7 and £10.

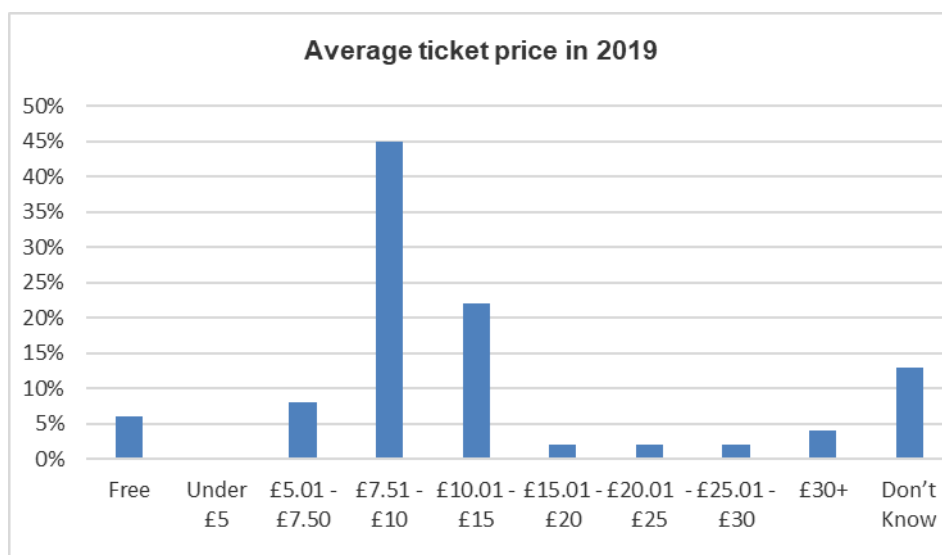


Figure 34

9.21 Sources of funding

79% of promoters funding came from box office with 40% accruing from donations. No PRS Foundation or Crowd Funding monies. 18% of funding came from the Arts Council

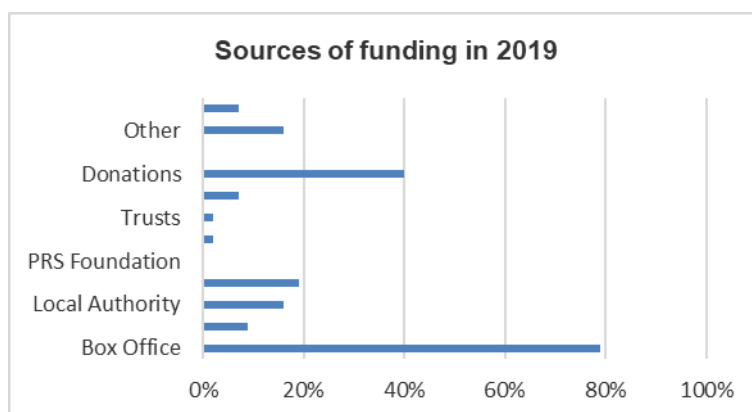


Figure 35

Table 14 shows the comparison of promoters in 2005, 2008 and 2019 and the financial support they received. A dismal picture emerged, with sharp reductions in Local Authority, Arts Council, PRS Foundation and Sponsorship funding.

Source of Support	2005	2008	2019
Local Authority	61%	55%	16%
Arts Council	78%	47%	19%
PRS Foundation	29%	12%	0%
Sponsorship	20%	10%	7%
Other	10%	30%	16%

Table 14

9.22 Use of social media

Figure 62 the standard social media outlets are well represented apart from Tik Tok, which is only used by 2% of promoters.

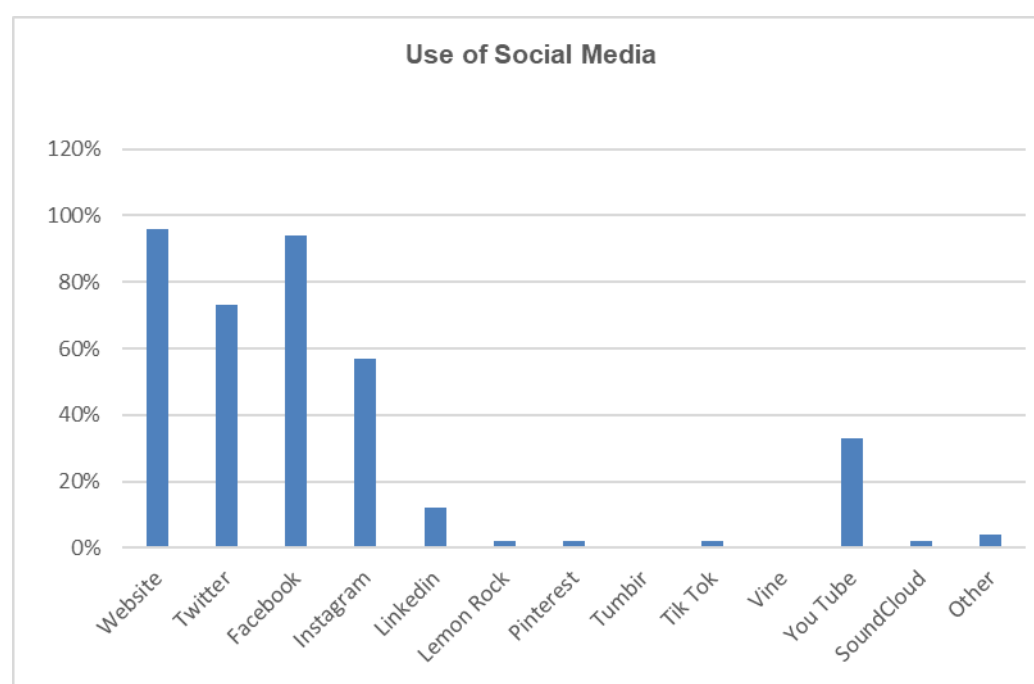


Figure 36

9.23 Frequency of usage of social media

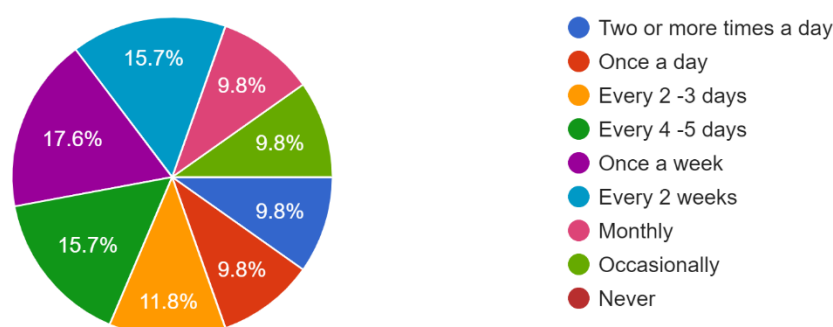


Figure 37

Figure 36 shows the frequency of use of social media by promoters 9.8% use it 2 or 3 times a day and 9.8% use it once a day. According to Internet Advisor, people spend nearly 2.5 hours every day on social media.⁵⁹

⁵⁹ <https://www.internetadvisor.com/10-social-media-statistics-you-need-to-know-in-2022#post-navigation-1>

Internet Advisor ranked the most popular platforms between 2012-2020. Promoters are using the popular platforms but could benefit from a more tactical approach in terms of how often they use these platforms to promote their gigs.⁶⁰

See table 15 below:

Daily time spent on social media,2012 -2020 - Active Users in millions

Platform	Users in millions
Facebook	2895m
YouTube	2291m
WhatsApp	2000m
Instagram	1393m
TikTok	1000m
Twitter	436m

Table 15

9.24 Where promoters currently advertise

The popular advertising medium is local newspapers (48%), followed by other media on 46%. Jazzwise is used by 18% of promoters and Jazz London News by 21% of promoters.

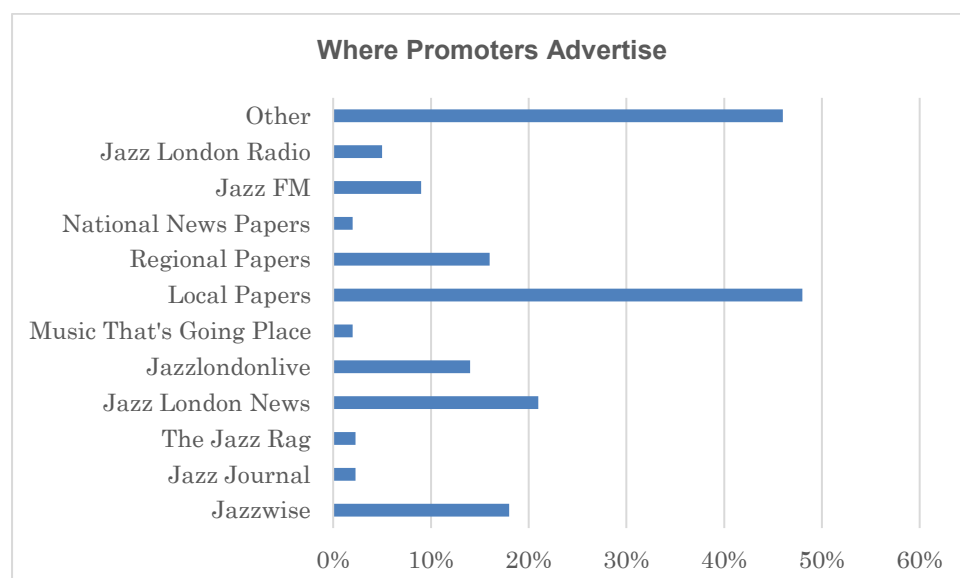


Figure 38

9.25 Regional spread of the promoters surveyed

Using the Arts Council England's area map, London provided 10% of the respondents with the South East on 31%, the North at 14%, the Midlands at 18% and the South West at 18%. Overall, 90% of the respondents lived outside of London.

⁶⁰ *ibid.*, 29

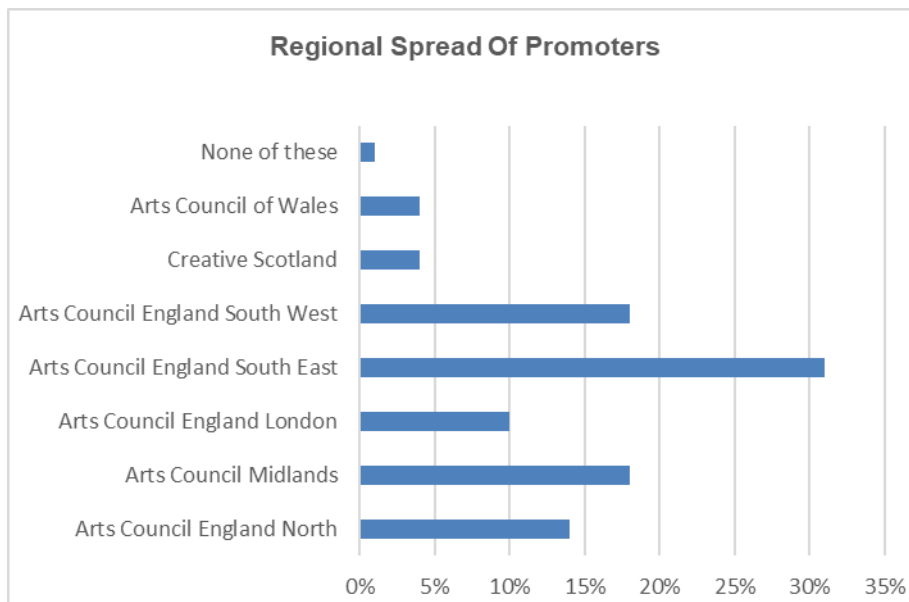


Figure 39

9.26 Awareness of the Arts Council England's 10-year strategy "Let's Create" and the delivery plan

The question was whether respondents were aware of, and had read, the Arts Council of England's 10-year strategy "Let's Create - 2020-2030" and their delivery plan titled: "Our Delivery Plan 2021-2024".

The results were disappointing. 37% of the respondents were aware of the Arts Council England's 10-year strategy "Let's Create". Only 27% had read the document. 29% of the survey were aware of the delivery plan, but only 18% of the survey had read the delivery plan. If people do not engage with the Arts Council and its strategy, then they will be at a disadvantage when applying for funds.

9.27 Demographics: age

51% of the promoters responded to the questionnaire. 80% of the promoters were aged over 55 with 80% of the promoters being male. 97% of the promoters were white. 90% of the respondents lived outside London

Age of promoters

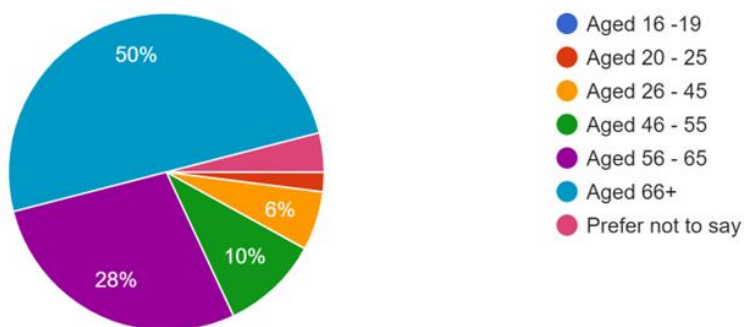


Figure 40

9.28 Employment

34% of respondents were retired. 28% of respondents were self-employed with 18% working part-time. 18% were employed full time.

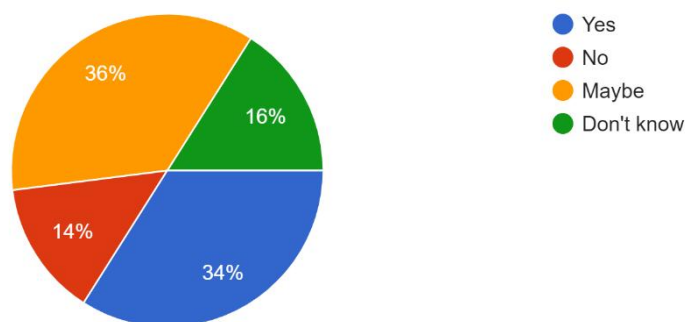


Figure 41

9.29 Diversity

97% of promoters were white with 3% coming from other backgrounds. 8% of respondents identified as Deaf or disabled, or had a long-term health condition.

Lack of promoter's agreement with their landlords coupled with promoters not being able to develop long term plans.

Appendix 10 - People and organisations

There were 43 responses, and 26 submissions.

10.1 Submissions were received from:

The Ivors Academy
Jazz re:freshed
Wayne Kennedy
UK Music.
Brian Blain
Ross Dines
Digby Fairweather
The Jazz Centre UK
Peter Conway
Body of People Jazz Theatre Company UK
Nubya Garcia
The Jazz in Education Initiative (JiE)
National Youth Jazz Orchestra
Sheffield Jazz
Leeds Jazz
Tomorrows' Warriors
National Jazz Archive
Oliver Weidling
Paul Kelly
Leeds Jazz
National Youth Jazz Collective
Corner Pocket Jazz Club
Harborough Jazz Club
Guildford Jazz
Suzanne Bull MBE – Attitude Is Everything
Wendy Kirkland

Set out below is a digest of the questionnaires and submissions.

10.2 Arts Council Region

Responses were received from London, Southeast England, Southwest England, Northern England and one each from the Midlands and Wales. Not all respondents provided this information.

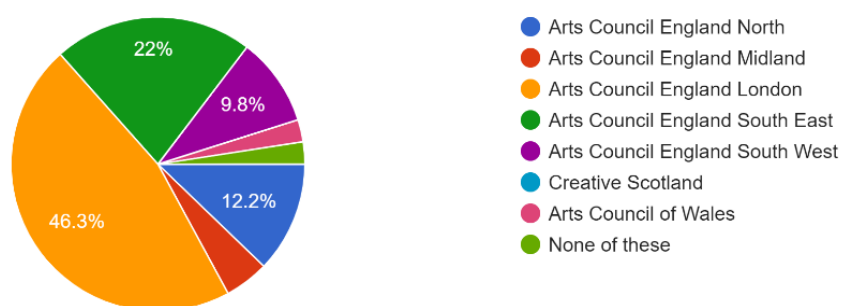


Figure 42

10.3 Jazz Audience

Jazz is the most open and accessible (in all senses of the word) of musical forms. Because of this it is less easy to define; and therefore, it is also the least easy to quantify. Therefore, it has generally received less political / financial / broadcast support than other genres (classical music being an obvious example). Shifting from this position, and granting jazz more support, would have a considerable impact on the number of young people wanting to get involved with music-making. It would facilitate a broader interest in, and access to, jazz; and the overall health of music-making and appreciation across the UK.

Audiences are typically comparatively small and tend to lack diversity in terms of age (predominantly older generation) and ethnicity (predominantly white). Numbers are stable in general but growing in some circumstances. It is however well documented that there is a renaissance of interest in jazz in London driven by new, young artists. As Tony Dudley-Evans has noted in his blog:

..... the focus on the London scene means that the jazz scenes in other UK cities are neglected. Again, André is clear that he is focussing on the London scene, and one should not criticise him for that, but scenes, such as those in Birmingham, Leeds, Manchester, the North East of England and Glasgow, are all lively scenes that make their own contributions to the variety of the overall UK scene.⁶¹

The Spin Club in Oxford has seen remarkable growth brought about by innovative marketing, use of social media and the involvement of young people.

There is a widespread opinion that a new, younger audience must be attracted and that this will require the use of social media and by creating a higher profile for jazz music. There is a marked contrast between local jazz clubs that are run by volunteers and city clubs, mainly in London, where high prices are charged for entrance, drinks and food. However, most venues for music popular with young people do not have seating. Which allows for dancing. Humphrey Lyttelton always said the jazz appeals to the "Head, the heart and the feet." Dancing is an important part of the contemporary promoter's equation for young audiences.

10.4 Artist Remuneration

The universal view is that artists are poorly paid, many not even receiving Musicians Union minimum rates. In addition, freelance workers have suffered earnings reduction disproportionately due to Covid-19. Poor rates of pay are viewed as likely to discourage young people from joining the industry unless they have additional income which in turn will result in a lack of diversity.

However, there are many brilliant young jazz musicians working in Britain today who are outstanding role models, not to mention excellent musicians. It seems insane not to lend them more help support in their early-stage careers: it would be a bold investment, and one which would pay off handsomely in terms of the UK's international cultural profile.

⁶¹ Tony Dudley-Evans, TDE Promotions, 19 May 2024

European countries are known for treating their creatives far better in terms of financial support and career development. The Arts Council England (ACE) is criticised for its cumbersome application process.

10.5 Brexit

Brexit is described as catastrophic, disastrous and a further disincentive to joining the music industry. There is criticism of the government for allowing this situation to develop when it was avoidable through negotiation. So constant lobbying of government is required. Better assistance is required with some of the costs of travel and also of promotion, so that promoters and organisers are not put off booking the artists from UK because of the bureaucracy. A simple *how to tour in the EU* guide would be helpful, that is, reliable and regularly updated.

Europe looked up to the UK music scene for its inventiveness and quality of musicianship. This competitive advantage is now in danger of being lost.

The British Council could do more to help UK musicians and bands work abroad.

10.6 Promotion

Promotion is vital both on a local and national scale. Artists are encouraged to demand fixed fees as this will encourage venues to better advertise the gigs but more importantly jazz should be promoted much more imaginatively throughout the population e.g. to women, children, senior citizens (who might prefer a daytime gig), ethnic groups. Promoters should be prepared to engage with non-typical audience bases on platforms that are not "the same old pub". Greater female representation and embracing of youth culture.

Artists should be better informed about how to build and connect with their audiences, and about the value of doing this, so that promoting a gig can become more of an equal partnership between them and a venue/festival. Good co-ordination and discussion amongst the organisers are needed.

On a broader scale, a national organisation is required that will raise the profile of jazz, increase exposure through mainstream media, and co-ordinate on a national basis. The European Jazz Network is cited as a good example.

There is an identified need for a scheme to encourage and develop a new generation of jazz promoters.

10.7 Effect of Covid19

The effect has generally been considered devastating, although one or two positives have evolved. One is that the use of live streaming, although considered inferior to a live gig, provides artists with a potentially international audience. Another is the growth of internet radio stations.

10.8 Agencies

While occasionally agencies provide a useful service, there is generally a negative view about their activities. This may well be due to the fact that as jazz revenues are often very low there is little profit to be made in the industry, which discourages commitment. However, one respondent noted that more professionally-trained managers and agents would help professionalise the UK jazz scene.

10.9 Effect of Streaming

Music streaming as provided by Spotify, for example, is seen as reducing income due to the algorithms used by streaming companies to calculate artist remuneration. However, there is general agreement that it will take international, multilateral agreement to alter the situation.

Rectifying the long-standing issues with music streaming to make it equitable for the whole music industry. There is evidence of multinational corporations wielding extraordinary power, and songwriters and composers struggling as a result.

An independent regulator should also be established to ensure the lawful and fair treatment of music creators. The UK has a proud history of protecting its producers, entrepreneurs and inventors. We believe British music creators deserve the same protections as those in other industries whose work is devalued when exploited as a loss-leader.

Government should set a timeframe for implementation of a Minimum Viable Data Standard for music recordings. Such a standard must require basic metadata relating to the underlying composition to be

attached to every recording uploaded to a streaming platform, so that fewer streams are unidentifiable. This would help to ensure that associated royalties did not fall into an un-allocable 'Black Box'. Agreement of rules on data authority should be reached within the same timescale.

Live streaming, which became prevalent during the pandemic, can be helpful as it brings live performance to a wider audience and perhaps an extra source of income. However live streaming has to be done well and is still inferior to the actual live performance.

Currently streaming is a well-established way of listening to music, so artists need to embrace the positive sides of that, whilst educating themselves and their audiences about D2F (Direct To Fan) ways of getting money directly to the artists, via online platforms such as Bandcamp.

10.10 Social Media

Social media use is widely seen as essential and may well replace most other media in due course. Certain sections of the population e.g. the elderly may not be able to use social media so traditional media is still important.

Use of social media requires special skills so training is required for those looking to augment their marketing and communication outlets. It is crucial that promoters and the jazz community exploit all available platforms.

10.11 Media Development

There is still a place for printed media but it needs improvement.

Jazz is neglected on mainstream media. Content has been reduced in national newspapers and on the BBC which may have resulted in lowering the profile of jazz. The jazz community need to develop their own blogs, websites and revenue streams.

There should be funds available to enable volunteer internet radio stations to produce programmes that are not covered by public or commercial radio stations.

Social media use is essential, particularly to reach a younger generation. Websites must be kept up to date. There is a trend recent years where online publications have traded reviews for advertising which is unfortunate but probably inevitable, given the present financial climate. unfortunate.

10.12 Education

There are two distinct strands to the question of education.

Music education in schools is significantly underfunded, and the delivery route via music hubs raises concerns because schools have to opt in to provide music education, rather than providing it as part of the curriculum. This has led to a reduction in the numbers of pupils studying music at GCSE and A level. While there may be occasional tuition or experience of music in schools this tends to be on an informal basis whereas several respondents believe that young children would benefit hugely from a more formal approach to music education that could and should include improvisation.

Inconsistencies in provision and the varied skill-sets of music teachers in music education leads to underperformance and failure to reach the standard required to enter university level education. One respondent suggested each child should be given a musical instrument. Another route is to get more artists into schools especially those who have no music programme.

Jazz is seen as niche, whereas it should be a provision all young musicians can access so as to encourage creative (rather than interpretive) music making skills such as improvisation, composition, and arranging

The National Plan for Music only discusses improvisation once – (Composing and creating music page 37 Case study 41). Also, musical terminology and elements in GCSE/ 'A' Level/ in the National Plan for Music is biased towards strictly notated western classical music. Jazz education in the UK is historically not well provided for, when compared with opportunities for learning music from the Western Classical tradition. This leads to a disconnect between the creative music industry and educational provision.

Many of the pre-degree jazz experiences offered by school and music services are most usually of the "big band" variety which entails an ensemble of young musicians performing mainly notated music and directed by a senior figure, usually the teacher. However, there could be more opportunities for young

jazz musicians to receive help in learning the craft of improvisation, composition and arrangement, and working in small ensembles.

The Associated Board of the Royal Schools of Music (ABRSM) jazz exams have not expanded their syllabus to Grade 8 or the range of instruments. Whilst Associated Board jazz exams end at grade 5 the non-jazz syllabus goes to grade 8.

The National Youth Jazz Collective (NYJC) found that rhythm section students are taking Rock school and Trinity London exams because they can't take ABRSM exams. .

Issie Barratt of the National Youth Jazz Collective produced the following table that gives the word count of compose and improvise in the 5 GCSE exam board and National Plan for Music.

GCSE SYLLABUS' EXAM BOARD	WORD COUNT: Uses of the word derived from improvise (Improvise/ improvisation/ improvisatory /improviser)	WORD COUNT: Uses of the word derived from compose (Compose/ composition/ composer)	Ratio	Improvisation mention as a % of comp
AQA	5	126	1:25	4%
CCEA	1	63	1:63	2%
OCR	8	139	1:17	6%
PEARSON	14	181	1:13	8%

Table 16

The National Youth Jazz Collective noted a bias when they offer improvisation workshops to schools or music services only the "jazz instruments are sent to them rather than all instruments. e.g. If grade 3 viola, trombone, and sitar players are keen to explore creative music only the trombone will be directed to the jazz option, often because the jazz option involves a big band.

Inclusion – Pauline Black draws attention to the fact that *“Barriers exist for women and girls in schools that need to be addressed if changes in gender participation in jazz and improvising are to happen”*.⁶²This problem is reflected in the Conservatoires. Please see Appendix 5, Applications and acceptances to the 11 conservatoires jazz courses.

There is a lack of advocacy opportunities for improvisation and composition. The National Youth Jazz Collective was the only National Youth Music Organisation (NYMO) to be given a mention in the National Plan for Music but they were not included in the Department For Education's round table discussions dealing with the development of the National Plan for Music

Furthermore, the National Youth Jazz Collective has not been invited to contribute to the national Hub Centre of Excellence for Continuing Professional Development (CPD),

“We will be appointing a national Hub Centre of Excellence for CPD, with national responsibility for coordinating a bank of teacher development resources, aligned to the national curriculum and building on the Model Music Curriculum, working closely with Music Hubs”.

Jazz expertise has been neglected in the development of music education policy, the education of music teachers, the style and delivery of music curricula and the experience of music in schools and beyond. Advocacy is needed to ensure that from now on, jazz is on the inside, contributing to policies.

There is some excellent work happening in youth jazz orchestras. but as always, a lack of funding and resources in education curtails this important activity. More funding is needed in education to support all music including jazz, so inclusion in the school curriculum is essential. Training for tutors is much needed and there is an almost total lack of relevant CPD for staff at all levels. All music curricula must reflect the current state of the industry - including for example business skills and social media, marketing etc. There are very few courses that teach students the skills needed to work in the industry.

⁶² Pauline Black. Jazz and improvising: experiences, attitudes and beliefs of United Kingdom (UK) secondary school music teachers: listening for gender. July 2023

Musicians should be educated on the marketing/promotion/strategy side of the music business alongside performance education.

Education at university and the conservatoires provides great opportunities. All music colleges across the sector require students to take modules in music business, outreach, media and so on. These are compulsory (required by UK Research and Innovation, formerly the Higher Education Funding Council for England) and generally run for a year or even two years, and have been in place for about 20 years, possibly longer. They are generally taught by experts and students cannot pass the courses without passing the modules. However, it would be useful to have research on the effectiveness of these modules.

However, Freedom of Information Inquiries to the HESA (Higher Education Statistics Agency) to ascertain the full time and part time employment outcomes for music courses at universities and conservatoires for their jazz courses. In particular, what type of employment do graduates take up when they leave? This information is not available within their Open Data. It may be available via a bespoke data request, though this would be likely to incur a charge.

One or two respondents thought there may actually be too many musicians graduating for the available market. Those that enjoyed subsidised opportunities for performance within youth jazz orchestras may struggle financially when they move on. Other respondents thought that students should learn to be more customer-facing - many graduates are excellent and innovative players, but cannot relate to their audiences. One respondent said a consolidated approach was needed, and that jazz graduates need to have the same opportunities as their classical counterparts.

One respondent emphasised that access to a musical education is expensive not simply because of the cost of lessons themselves. Programmes such as Tomorrow's Warriors helped with "all of this stuff that people forget about": instrumental costs, the expense of travelling to music lessons and rehearsals, the need for a practice space outside of the home. Cuts to arts funding will make the music industry "very elitist – even more elitist than music is already." It will dramatically affect the spread of diversity in the future, for young people coming up through music and wanting to continue. They will not see it as a possibility, but as a struggle.

10.13 Public Funding and Sponsorship

There is widespread disenchantment with ACE, with some respondents relating in quite moving detail how they have applied many times for funding with no success and with no valid explanation for the result. There is also criticism of the National Portfolio Organisation (NPO) system as such organisations take most of the available funding and being larger, available to afford administrators, builds in an improved ability to bid for further funds. There is also criticism that more funding is provided for London based organisations leaving small, provincial operations struggling and almost entirely reliant on volunteers. Recent experience of Arts Council England is of an organisation under pressure which is more concerned with written policies than with outcomes and results. There needs to be a change in the culture of the Arts Council to ensure results are celebrated and encouraged.

A simplification of the funding application process to lottery funding organisations would be helpful.

To assist venues and promoters a reduced VAT rate to 7.5% (which is the average reduced rate in the EU) should be available for cultural events.

10.14 Commercial Funding

Some organisations have been successful in attracting commercial funding, notably youth jazz orchestras, but in general this route is viewed as difficult. The ability to attract commercial funding is an area that addressing with some urgency. Respondents believe that jazz must have a higher profile, and be seen as thriving, before commercial organisations will want to be associated with it. Jazz clubs themselves need to take a commercial approach, with their members offering privileges and perks to those who buy enhanced memberships.

10.15 Marketing, Planning and Policy

Several respondents cited the situation in some European countries where musicians and the music industry have much greater support from government and arts administrations. Marketing can be an expensive and time-consuming chore for independent musicians so some suggested networks sharing the load with the defunct Jazz Services Touring Scheme mentioned. Given the dominance of the

London jazz scene provincial venues and clubs need extra funding to be able to pay London based musicians enough to justify the travel and hotel bills.

Some respondents believe that jazz has to become more accessible to a wider audience and to become less hidebound and insular. It seems counter-productive that a niche art-form is further sub-divided into smaller factions that have little to do with each other.

The difficulties associated with performing in Europe since Brexit has reduced opportunity and income for everyone from single musicians to jazz orchestras. A change to the visa system is seen as an urgent requirement.

Reduction in VAT levels for venues would be helpful.

10.16 Disabled People and Access

Whilst there's mentions of access in the document, which focuses on access for audiences, musicians and promoters and mainly on physical access.

There's not much mention of disabled people working in other areas of jazz, except for promoters. Beyond The Music programme for disabled professionals could help with this: <https://attitudeiseverything.org.uk/professionals/> This could mean that the survey didn't get those responses, but it could also mean that your surveys/consultations did not reach the disabled jazz community, or weren't in an accessible format to enable people to complete the research.

The refreshed [National Plan for Music Education in England](#), released in June 2022, emphasizes inclusivity and accessibility in music education. It highlights the importance of adaptive instruments and commits £25 million for investment in musical instruments and equipment, including adaptive ones. The plan encourages Music Hubs to support schools in identifying and sourcing the best instruments for their pupils, ensuring that adaptive instruments are celebrated and integrated into music-making.

In response to all of these papers, an Inclusive Music consortium came together a couple of years ago to agree with the Department For Education and the and the Department for Culture Media and Sport:

- Better representation for young Disabled people in music education ('Nothing about us without us')
- Better understanding of the lived experiences of young Disabled people and the barriers to music they face.
- Opportunities for young Disabled people to take part in sustainable, high quality music making, not just as therapy, but as musicians.
- Funding and resources proportionate for removing disabling barriers to music.
- Open up personalised progression routes in music for young Disabled people beyond compulsory education.

[Creative United](#) have developed Take It Away an affordable instrument loan scheme - <https://www.creativeunited.org.uk/category/take-it-away/> Also to address primary school provision of the Teaching Whole Class Ensemble, Creative United set up this - <https://www.creativeunited.org.uk/services/iamm/> - inclusive access to music making.

[Attitude is Everything](#) and [The Musicians Union](#) partnered a couple of years ago on the 'Just Ask' training which was about training promoters on how to work with disabled musicians and crew - <https://attitudeiseverything.org.uk/industry/working-with-disabled-artists/just-ask-guide/>

Attitude is Everything also run a Next Stage initiative which works to ensure that artists who have access requirements can thrive within the music industry. Whether you have access requirements or not, as a professional musician, producer, DJ or solo artist, musicians can play their part in making their shows more accessible. Here's more about their programme <https://attitudeiseverything.org.uk/artists/>

Recently, Andrew Lansley worked with Attitude is Everything, Musicians Union and Continental Drifts on Unmute - <https://musiciansunion.org.uk/deaf-and-disabled-musicians>

To improve venues/festivals' access, Attitude is Everything's Live Events Access Charter has recently been reviewed and amended. Venues/events should be encouraged to use this framework when improving access, and not just physical access - <https://attitudeiseverything.org.uk/industry/live-events-access-charter/>

The [Unseen. Unheard. Race and Disability – Black disabled experience in the UK's music industry](#) provides a wealth of data and information.

Coming in 2025, [“All In”](#) is the new access scheme for creativity and culture in the UK and Ireland. Creative and cultural experiences should be accessible to all. The scheme's objective is to improve accessibility and remove barriers to help theatres, museums, galleries, festivals and more welcome deaf, disabled, and neurodivergent people through their doors.

Or they can sign up to Arts Council England's new initiative / pilot called All In - <https://allin.online/> - who are developing access standards and programme. All of this could mean better pathways for disabled creators and professionals in the future.

10.17 Development of Jazz Culture

Some sort of national organisation that is not beholden to ACE would be considered a positive development. Such an organisation should start by seeking to influence music teaching in schools, including the history of music, and not to assume that music has to be classical or pop to be good. There should be co-operation with other arts focussed organisations, thus raising the profile of jazz as an art form that appeals to the majority. For jazz to become fashionable it has to cast off its image of a niche style of music that is mainly enjoyed by the elderly in rather unattractive small venues. Basically, it needs a make-over.

In terms of equality, diversity and inclusion there have been marked improvements due in no small part to “incubators” such as Tomorrows Warriors, Jazz Re:freshed, Serious, National Youth Jazz Collective and a number of promoters and festivals such as We Out Here, Serous and Love Supreme,

A respondent who is a promoter from outside London provided a number of action points:

- Emergence of a stronger coordinating and lobbying body led by people who will have credibility with Government and ACE
- A shift in policy by ACE toward much greater fairness in the allocation of funding between arts forms, underpinned by greater expertise and understanding at senior levels
- Support for regionally dispersed jazz promoters/venues and a much more substantial support for touring by London-based musicians
- A greater emphasis on business /marketing skills for those undertaking jazz degree courses
- An initiative by ACE and British Council to support touring overseas by British jazz musicians to enable them to take a place on the international stage more proportionate to their talents

10.18 Jazz Archives

While seen as something of value, jazz archives are probably not the highest priority for everyone. Generally, the feeling is that they should be easily accessible via the internet and then people would use them. They could also offer curating and exhibition services to museums on jazz in the UK. Respondents said that there is a need for interactive archives, holographic roadshows in the long term discuss – and move towards – the establishment of a central hub for jazz activity in Britain: in short a ‘National Jazz Centre’ in which the facilities offered by the National Jazz Archive and the Jazz Centre UK could be consolidated into central project.

10.19 Awareness of the Arts Council England's strategy “Let's Create”.

It was difficult to judge what respondents thought on this subject although given their criticism of ACE it is unlikely to be positive.

10.19 Demographics

Opinions were split as to whether the gender imbalance in jazz was being addressed.

Employment -14% of respondents were retired. 20% working parttime. 66% were employed fulltime.

Diversity - 85.6% of respondents were white with 14.4% coming from diverse backgrounds. 11.4% of respondents identified as a Deaf or disabled person, or have a long-term health condition.

Appendix 11 - Background to the *Review of Jazz in England*, approach and methodology

The All-Party Jazz Appreciation Group (APPJG) wrote to Darren Henley CEO of Arts Council England (ACE) in July 2016 to ask if ACE would consider undertaking a review of jazz in England, to inform the next funding round for National Portfolio Organisations along similar lines of the 2012 review of the Arts Council's funding for large scale opera and ballet companies. The review would ensure that the public and jazz in England and will get the best value from the Arts Council investment. The answer was no and the APPJG wrote again in November 2016 to ask if ACE would reconsider and a protracted correspondence followed – the answer was still no.

The All-Party Parliamentary Jazz Appreciation Group (APPJAG) asked their Secretary Chris Hodgkins to undertake a review of jazz in England.

The review of jazz in England concerns the operation, management and business of jazz, its purpose being twofold:

- To help the jazz constituency in England to better understand and utilise its resources in the support of jazz most efficiently and effectively;
- To make the case for improving the support, sustainability and promotion of jazz and to assist in the continued development of a healthy jazz scene in England.

The *Review of Jazz in England* is being achieved in three exercises. The first two parts were designed to answer the question "Where are we now?" Part three is designed to help answer the question "Where do we want to be?"

Part one was [*Cold Comfort and Home Truths – informing the Review of Jazz In England*](#) that sets out the hinterland of the development of jazz in England jazz as applied to the [terms of reference](#). This paper is not about the musicology of jazz, nor a history of jazz in the UK; the music always reinvents itself at regular intervals.

Part two looks at the current state of jazz in England by examining the areas stated in the [terms of reference](#) and informed by five key surveys aimed at the jazz constituency. Please see [Appendix 11](#) for methodology.

Part three - Where do we want to be? - entails the development of a simple action plan for jazz in England that will be placed out for consultation to people who respond to the review of jazz in England and the jazz community at large.

For the avoidance of doubt the term 'jazz' refers to jazz from early music (classic jazz) to whatever is happening on the stages of jazz clubs, venues and concert halls today and tomorrow

The methods used were desk research and quantitative surveys

There were five questionnaires that dealt with musicians, promoters and venues, audiences, festivals and people and organisations. The questionnaires can be seen at <https://appjag.org/review-of-jazz-in-england/>. The questionnaires were circulated through the jazz community from May 2021 with reminders in June, August and September 2021.

Number of Returned Questionnaires

Musicians	168
Jazz promoters and Venues	52
Audiences	227
People and Organisations	43
Total	490

Table 17

11.1 Follow up questionnaire

A follow up questionnaire was circulated in June 2024 to musicians, venues and promoters who had completed questionnaires and agreed to be contacted at a later date. to ascertain if any major changes had taken place. A total of 33 questionnaires were returned (23 musicians and 10 promoters).

The question asked was:

Since our sending the original survey out a couple of years ago, we're mindful of evidential shifts in the jazz industry, the wider music business, technology and of course local, regional and national economies, has anything SIGNIFICANTLY changed in the way you and or your organisation works?

This snapshot shows that over 50% are changing the way they operate.

51% of the respondents have seen the changes and it has affected the way they operate. 42% have introduced new strategies with 21% more dependent on commercial income. 64% have learnt new skills and 70% have increased their use of new media with 42% evolving new products and services. Only 27% were happy to continue with a "business as usual approach" and 52% were unhappy with this approach. 9% were no longer operating.

Question	Yes	No
We have seen these changes, but they have not affected the way we operate	27%	51%
We have introduced new strategies in the way we work.	42%	45%
We are now more dependent on commercial income	21%	42%
We have had to learn new skills to survive and/or grow	64%	24%
We have increased our use of social media	70%	24%
We have evolved new products and services to survive and/or grow	42%	39%
We are happy to continue with our "Business-As-Usual" approach.	27%	52%
We are no longer operating.	9%	70%
Prefer not to answer	-	45%

Table 18

Appendix 12 - About the authors with thanks and acknowledgements

The authors are grateful for the assistance of the following people: Paul Thomas, Suzanne Bull MBE Noel Dennis, Chris Taylor, Paul Kelly, Simon Purcell, Eva Frost, Catherine Tackley, Dominic McGonigal, Oliver Weindling, Wendy Kirkland, Andrew Lansley, Mark Kass, Kevin Legendre, Victoria Kingham, Sarah Chaplin, Peter Slavid, Nigel Tully, Digby Fairweather and the trustees of the UK Jazz Centre and the [Advisory Panel](#)

12.1 Authors

Chris Hodgkins MBA FCIM was raised in Cardiff. In 1974 co-founded the Welsh Jazz Festival and four years later established the Welsh Jazz Society. As a trumpet player Chris toured the UK and Europe and appeared at the Sacramento Jazz Festival in the States. With his own band he made a number of television and radio appearances. Wild Bill Davison commented, "It's a hell of a good band."

He relocated to London to play professionally and in 1985, was appointed Director of Jazz Services Ltd., and was Chair of the National Jazz Archive 2005-2014. Chris helped establish the annual Parliamentary Jazz Awards.

Chris retired from Jazz Services Ltd in May 2014 and has taken to the road, the radio and the recording studio to focus on playing. Chris presents two programmes on Jazz London Radio and Pure Jazz in New York

Chris published a business planning manual for jazz musicians: *Where Do You Want To Be?* is available on the Online Music Business Resource as a free download at www.chrishodgkins.co.uk.

Chris is secretary to the All-Party Parliamentary Jazz Group <https://appjag.org/>

Howard Lawes graduated from Birkbeck College, University of London, in Mathematical Sciences (1981). During his career as a meteorologist, he worked for the UK Meteorological Office and Noble Denton specialising in consultancy to the offshore engineering industry.

Since retirement in 2009 his interest in jazz has evolved from playing alto saxophone to working voluntarily for Jazz Services, the EFG London Jazz Festival and the University of the Third Age. He regularly writes jazz articles and reviews for Sandy Brown Jazz and promotes jazz at a local venue.

12.2 Contributors

Kevin Le Gendre is a journalist and broadcaster with a special interest in black music, literature and culture. Since the late '90s he has written about soul, funk, jazz and hip-hop, as well as African and Caribbean authors for many publications, including *Echoes*, *Jazzwise*, *The Guardian*, *The Independent*, *Qwest tv* (France) and *Times Literary Supplement Online*. He contributes to BBC Radio 4's *Front Row* and also presents documentaries. He is the author of *Don't Stop The Carnival; Black Music In Britain Vol.1* (2018) and his latest book is *Hear My Train A Comin': The Songs Of Jimi Hendrix*.

Nigel Tully MBE, MA (Oxon), FBCS, C. Eng -. Bandleader, businessman and jazz supporter Nigel Tully was Executive Chair of NYJO 2009 – 2021, had a notable career with IBM UK 1964 – 2003, and still runs and performs regularly in rock/pop band The Dark Blues which he formed while studying Physics at Oxford University in the early '60s

In the process of rescuing NYJO from imminent bankruptcy he made it a genuinely national entity, quintupled its turnover and made it financially robust, started and grew its Learning stream to be the equal of its Emerging Professionals foundations, developed strong international links with Germany, the Netherlands and the USA and embedded EDI (Equality Diversity & Inclusion) practices throughout the organisation

He has played over 5,000 live gigs with The Dark Blues, among them several private parties for the royal family including the 21st and 40 the birthday parties of HM King Charles. The gig of which he is most proud is being chosen by the Musicians Union for a party in City Hall for over 100 delegates from around the world for the International Federation of Musicians

In his day-job with IBM UK (he turned down an international career because of his UK gigs with The Dark Blues) he became the role-model for large-scale relationship management of major business customers, firstly turning BT over a 20-year-period into IBM's largest customer outside the USA and then transforming the relationship with Barclays Bank. After retiring early from IBM to be Master of the Worshipful Company of Musicians, he had a successful career as a trouble-shooting consultant, sorting out problems at Liberata, Flowmaster, BT Global Services and Balfour Beatty, until NYJO became all-consuming in 2009.

Today he chairs Jazzlife Alliance, N Ireland's only jazz education organisation, and the Popular Music committee of the Musicians' Company; he is still a member of its Jazz Committee which he started in 1990 and helps run its annual Tina May Young Jazz Musician competition which he started with the late Sir John Dankworth in 1992. He is also a Trustee of his local Pre-School; he says working with young mums and nursery teachers is very good for him and he is still learning from them.

He was awarded the MBE for services to jazz in 2018.

Leslie East OBE, BMus, MMus, FGS, Hon.RCM. Former Director of Music, Guildhall School of Music & Drama and co-founder of its postgraduate Jazz Course in 1984. Former Chief Executive of The Associated Board of the Royal Schools of Music where, as Director of Publishing, he supervised the development of the Jazz Exam syllabus publications.

Noel Dennis is an accomplished management educator and has successfully taught at all levels in higher education. With a particular focus on executive learners, he is credited with leading the development of one of the first transdisciplinary MBA courses in the UK.

Noel has a rich experience in leading various portfolios including learning and teaching, curriculum development as well as strategic marketing and recruitment.

In addition to his long career in education, he is a professional jazz musician and uses his experience as an improviser to provide a unique perspective on strategic management and leadership issues. He has gained international recognition for his work in combining these areas and is a prolific author with extensive publications.

Noel is a Senior Fellow of Advance HE, a qualified marketer and holds a Masters in Enterprise and Multimedia and a DProf in Strategic Marketing and Jazz from Middlesex University.

Steve Crocker is from LeedsJazz – a volunteer run independent jazz promoter based at Seven Arts in Chapel Allerton, Leeds. Steve has been promoting jazz as a volunteer most of his life, he previously ran Jazz at the Leadmill in Sheffield and helped start the original Leeds Jazz organisation. The current JazzLeeds have been at the Seven Arts venue since 2007 and now put on over 100 concerts per year, support three secondary schools in jazz education, have workshops, community orchestras and contribute to two jazz festivals in the city.

Dr. Victoria Kingham played saxophone for various London bands in her youth, then became a computer programmer, trainer, manager, and consultant. Subsequently she became an academic specialist in American Arts, Literature, and Culture, and a reviewer and editor. She holds degrees from London, Cambridge, and De Montfort universities, and now works as a freelance music journalist. Currently she edits the Arts section of Hastings Independent newspaper.
