

# **Connecting for the Future**

## **A Review of Jazz in the North East of England**

**Presented by**  
Jazz Services Ltd  
First Floor  
132 Southwark Street  
London SE1 0SW  
Tel: 020 7928 9089  
Fax: 020 7401 6870  
[education@jazzservices.org.uk](mailto:education@jazzservices.org.uk)  
[www.jazzservices.org.uk](http://www.jazzservices.org.uk)

## **Foreword**

Jazz Services Ltd was commissioned by Arts Council England, North East to undertake a review of the provision of jazz in the North East of England and make recommendations. The Jazz Services team that produced this report comprised Chris Hodgkins, Kathy Dyson, Ivor Widdison and Kate Roebuck.

The report consists of an executive summary; the report with conclusions, analysis, recommendations and appendices. Each section is indexed for ease of reading.

## **Main Index**

- I Executive Summary**
  
- II The Report – Connecting for the Future – a review of jazz in the North East of England**
  
- III Appendices**

<b>I</b>	<b>Index to the Executive Summary</b>	Page
1	<b>Review of Jazz in the North East of England</b>	4
2	<b>The Report and its contents</b>	4
2.1	<b>Section 1</b> The brief	4
2.2	<b>Section 2</b> The landscape for the North East of England and for jazz	4
2.3	<b>Section 3</b> Conclusions and analysis	7
2.4	<b>Section 4</b> Recommendations	8

# **I Executive Summary**

## **1 Review of Jazz in the North East of England**

Jazz Services has been asked to conduct a review of jazz in the North East of England by Arts Council England, North East.

The review involved

- Self completion questionnaires to musicians, promoters, local education authorities, local authority arts departments and arts organisations.
- One to one interviews with key figures in the North East
- Desk research

## **2 The report and its contents**

The report contains four sections and appendices.

### **2.1 Section 1**

This section outlines the brief to Jazz Services which in essence seeks the answers to two crucial questions; "where is jazz in the North East now?" and "where should jazz in the North East be in the future?"

### **2.2 Section 2**

2.2.1 This section explores the general landscape for the North East in terms of the following:

#### **2.2.1.1 Geography**

The counties of Northumberland and Durham and accompanying metropolitan and unitary authorities

#### **2.2.1.2 Economy**

The region has seen enormous changes over the past years and the economic base has diversified. However, the region is still dealing with the economic and social consequences of the past, including high unemployment.

#### **2.2.1.3 Population and Demographics**

The population is 2.5 million which has declined by 2.8% since 1991. 78% of people are aged between 5 and 64 years. 2.4% of people belong to ethnic minorities.

#### 2.2.1.4 Education

There are 1327 schools with 433,660 pupils, five universities and 25 further education establishments.

#### 2.2.1.5 Internet access

The proportion of households with access to the internet is 32%.

#### 2.2.1.6 National Lottery

The North East has received the fewest awards next to Northern Ireland.

#### 2.2.1.7 Media

The North East is covered by BBC North East and Cumbria, ITV Tyne Tees, with 15 local radio stations and 51 regional newspaper titles.

### 2.2.2 This section explores the landscape for jazz.

#### 2.2.2.1 Market Share

4.1% of people currently attend jazz events in the North East as compared to 7.1% for classical music and 18.9% for rock and pop. Of those people who attend jazz events, half of them attend more than once a year.

#### 2.2.2.2 Audience Overlap

41% of people who attend contemporary dance also attend jazz.

#### 2.2.2.3 Demographics

The age range 15-44 years (34.4% of jazz attendees) is below the population distribution for those ages in the North but above for those jazz attendees aged 45-64 years (50% of jazz attendees).

Jazz in the North East, as all other art forms, has a propensity to attract above average audiences for ABC1 social grades.

40% of jazz attendees finished education at 16 years or younger.

Readership of national and local newspapers is analysed. 25% of Guardian readers attend jazz events as compared to 10% of local newspaper readers who attend jazz events.

#### 2.2.2.4 Potential interest

There are 3.4% of people in the North East who watch jazz on television but do not attend, and 4.5% of people who attend. The potential audience is 7.9%.

### 2.2.3 Musicians

This section explores the results of the musician's questionnaire. There were no respondents who had been playing for 1 to 5 years. Big band and mainstream genres were performed by a quarter of musicians. 26% of the respondents played jazz clubs and 28% playing functions. 75% of work was in the North East. There is

a low level of awareness of funding opportunities. Priorities for career development were:

- more performance opportunities
- training in marketing
- more networking opportunities.

#### 2.2.4 Promoters

Venues promoted a wide range of musics. Two promoters had been promoting less than two years. 42% of the respondents were full-time promoters. 41% of income is from box office, with 21% coming from public grants. The most useful way respondents felt they could be assisted was:

- with audience development
- followed by support for recording work
- providing information and networking opportunities
- providing support to develop promoting skills
- subsidy for venues.

#### 2.2.5 Exploring the landscape

The landscape for jazz in the North East is looked at in detail and the following areas are explored:

- Promoters and residencies
- Live music survey
- Jazz festivals
- Marketing: including details of the jazz press, demographics of the reader of local newspapers and the internet
- Recording studios
- Music shops
- Jazz education in the North East
- Key organisations:
  - Jazzaction
  - Jazz North East
  - The Sage Gateshead
- One to one interviews

The interviews were structured under three headings:

- What is right with jazz in the North East?
- What is wrong with jazz in the North East
- How would you like to see jazz in the North East develop?

The areas covered by interviews were promoting, marketing, performing, touring, education and training, funding, networking, new work and recording.

## 2.3 Section 3

Section 3 is concerned with the conclusions of the report and analysis, and deals with:

The landscape generally and for jazz i.e.: audiences, musicians, promoters and venues, festivals, marketing, recording studios, music shops, jazz education and key organisations.

The analysis deals with:

Value chain and SWOT analysis. Set out below is the SWOT analysis with key factors for success and strategic issues.

### 2.3.1 SWOT analysis

#### 2.3.1.1 Introduction

A SWOT analysis is a study of the organisational strengths and weaknesses of jazz arising from the 'internal' appraisal and the major opportunities and threats that arise from an examination of the 'external' environment e.g.: the market for jazz.

#### 2.3.1.2 SWOT analysis

<p><b>Organisation Strengths</b></p> <ul style="list-style-type: none"> <li>• Key organisations in place: Jazzaction, Jazz North East, Sage Gateshead</li> <li>• Three jazz festivals: Whitley Bay, Borders, Tyneside Jazz Festival, proposed Sage Gateshead festival</li> <li>• A core of experienced and able jazz musicians</li> <li>• Pool of experienced advisors</li> <li>• A track record of jazz in education in the North East on which to build</li> </ul>	<p><b>Organisation Weaknesses</b></p> <ul style="list-style-type: none"> <li>• Lack of explicit objectives</li> <li>• Weak communication between jazz organisations</li> <li>• Danger of uncoordinated activity leading to duplication of tasks</li> <li>• Paucity of marketing skills, tools and initiatives</li> <li>• Insufficient capacity in terms of suitable venues and information websites</li> <li>• Musicians have low level of awareness of funding opportunities and touring opportunities with Jazz Services</li> <li>• Dearth of young musicians</li> <li>• Dearth of young promoters</li> </ul>
<p><b>Opportunities</b></p> <ul style="list-style-type: none"> <li>• Market jazz to the audience for contemporary dance</li> <li>• Build audiences in the 15-44 age groups</li> </ul>	<p><b>Threats</b></p> <ul style="list-style-type: none"> <li>• Lack of a 'jazz economy'</li> <li>• Audiences for jazz have reached a plateau and remain below the national average</li> </ul>



<ul style="list-style-type: none"> <li>• Exploit the mature market</li> <li>• Develop audiences in the C2 and D groupings</li> <li>• People who watch jazz on television but do not attend jazz events</li> <li>• Coordinate and increase jazz education activity in the North East</li> </ul>	<ul style="list-style-type: none"> <li>• Audiences for jazz in the 15-44 age groups continue to remain below the general average for the region</li> <li>• C2 and D groupings continue to miss opportunities to experience jazz</li> <li>• Internet access remains low in the North East</li> <li>• The North East continues to remain a laggard in terms of lottery applications</li> <li>• Level of lottery funds available to the arts diminishes as a result of national lottery licensing and regulation</li> </ul>
--	--

### 2.3.2 Key factors for success

- Pool of expertise in jazz in the North East
- Presence of development and promoting organisations such as Jazzaction and Jazz North East
- The potential for The Sage Gateshead to work and cooperate with the jazz community
- Support of Arts Council England, North East
- Core of experienced musicians and promoters
- An audience for jazz music and a potential audience of 7.9%

### 2.3.3 Strategic issues

- Availability of funding
- Lack of articulated goals (aims) and objectives (targets)
- The ability of the main organisations to connect and work with each other to build a 'synergy' that serves the jazz and wider constituency and its audiences, musicians, promoters and the education sector.

## 2.4 Section 4

### 2.4.1 Introduction

Section 4 deals with the recommendations which are set out below. All recommendations are tagged with the organisation(s) best suited to expedite them.

### 2.4.2 Key Recommendation 1

#### 2.4.2.1 Time scale and action programme

Once this report has been accepted by Arts Council England, North East, there will need to be a meeting of all interested parties facilitated

by Arts Council England, North East to agree all the recommendations and develop an action plan with an agreed time scale. **Stakeholders will have to consider the proposed strategy that is a key recommendation.**

### 2.4.3 Key Recommendation 2

#### 2.4.3.1 **The formulation of a strategy that will develop jazz in the North East of England**

A strategy serves as a basis for agreement for all parties on the goals towards which an organisation(s) efforts are to be directed and helps ensure co-ordinated action.

If there is no agreed strategy, the action taken may reflect varying assumptions as to how the objective is to be pursued and pursue a zig zag course.

For the sake of clarity, it is worth remembering that goals or aims are the intentions behind decisions. A goal, for example, could be to increase the number of venues promoting jazz. An objective or target is the goal stated in measurable form e.g.: to encourage six venues a year to add jazz to their programming policy. Goals and objectives are a way of saying "where are we going?" and "what is our destination?" A strategy is the route by which an objective can be reached and action plans are the means of transport to get you there.

#### 2.4.3.2 Strategy formulation

The formulation of a strategy is based on the answers to three questions:

1. What basis?
2. Which direction?
3. How?

##### 1. What basis?

There are three general strategic options that can be usefully considered in the development of the basis of an overall general strategy which jazz in the North East (JINE) will want to pursue. Furthermore it should be noted that commercial organisations establish an overall general strategy on which a company can build and sustain competitive advantage. For public services the basis of their general strategy is to maintain the quality of service within agreed budgets so they can provide 'value for money'.

The three options are cost, differentiation and focus. Cost strategy is where an organisation sets out to become the low cost producer. A focus strategy involves the organisation serving a segment or group of segments in its market place and channels its efforts on serving them to the exclusion of others. Differentiated strategy is where an organisation seeks to be unique in its industry sector along some dimensions that are valued by its existing and potential users.

The recommended general strategy that should form the bedrock of a strategy for JINE is differentiation.

## 2. Which direction?

In light of the findings of this report e.g.: lack of infrastructure, no jazz economy, small audiences, the strategic direction to pursue is that of consolidation; a pulling together of all strands to build an infrastructure and a strong platform from which JINE can develop.

## 3. How?

The final question to be answered is how? What is the method of development? The development method best suited to deliver differentiation and consolidation is joint development and alliances.

### Key Recommendation 2.1

**It is vital that key organisations and individuals connect with each other to develop and build collective action programmes that will deliver these recommendations.**

This report and its recommendations provide an opportunity that must be seized if the public at large, young people and the jazz constituency are to be best served in their enjoyment of jazz.

A failure of one or more parties in this endeavour, who fail to connect, will produce a fault line in the consolidation process that will place the endeavours of the remaining parties in jeopardy.

### Key Recommendation 2.2

**That Arts Council England, North East encourages and facilitates jazz organisations and individuals to cooperate to form an alliance that will help JINE pursue a policy of identifying, building and maintaining 'differentiation'**

**and the consolidation of activity to build an infrastructure for JINE. That Arts Council England, North East encourages organisations to develop their action plans in line with these recommendations.**

#### 2.4.4 Recommendation 3

##### 2.4.4.1 Musicians

- Develop an online database of all the jazz musicians in the North East with information on genre of jazz played, education work undertaken, bands worked with etc.

Actioned by Jazzaction.

- Develop an online database of funding, touring and work opportunities for jazz musicians in the North East of England.

Actioned by Jazzaction.

- Develop training seminars in:
  - Marketing your band
  - Getting your self on the internet
  - Reaching the media
  - Professional development

Actioned by Jazzaction in conjunction with Jazz Services.

- The fostering and encouragement and coordination of jazz education to build and develop young musicians.

Actioned by Jazzaction and the Sage Gateshead.

#### 2.4.5 Recommendation 4

##### 2.4.5.1 Promoters

- Develop training seminars in:
  - Audience development
  - Reaching the media
  - Funding opportunities
  - Developing touring network and consortia
  - The way to better marketing including discount schemes etc.

Actioned by Jazzaction in conjunction with Arts Council England, North East and The Sage Gateshead.

- Develop new venues and encourage existing venues who rarely promote jazz to promote more jazz.

Actioned by Jazzaction in conjunction with Arts Council England, North East and Jazz Services.

- Explore ways to encourage new promoters which could include seminars, mentoring and to develop training for existing promoters who know a little about jazz or nothing at all.

Actioned by Jazzaction and Arts Council England, North East.

- Develop touring circuits

Actioned by Jazzaction in conjunction with The Sage Gateshead.

- Investigate piano hire/piano purchase schemes for the North East.

Actioned by Jazzaction in conjunction with Jazz North East and Arts Council England, North East.

- Develop a marketing/media pack that presents the value of jazz in the North East (including audience numbers, demographics, events and activities) aimed at local, regional media and local authorities and potential sponsors and funders.

Actioned by Jazzaction, Jazz North East and Jazz at the Exchange.

- Develop an audience database for jazz in the North East.

Actioned by Jazzaction, Jazz North East, Jazz at the Exchange and The Sage Gateshead.

- Develop an information database of all promoters, venues and residencies that promote jazz in the North East whether frequently or infrequently. The database must include details of all access facilities available at the venues.

Actioned by Jazzaction in conjunction with Jazz Services.

#### 2.4.6 Recommendation 5

##### 2.4.6.1 Jazz Festivals

Ensure that festival organisers in the North East meet at least once a year to share information, explore ways of co-operating on marketing and fundraising. For example, exploring the feasibility of capturing one major sponsor for all four festivals.

#### 2.4.7 Recommendation 6

##### 2.4.7.1 Marketing

- Develop a jazz audience database
- Develop training seminars for musicians and promoters
- Invest in qualitative research into ascertaining the barriers that stop potential attendees who watch jazz on television but who do not attend live jazz events
- Develop a marketing/media pack
- Develop a jazz listing/what's on magazine and online magazine for jazz in the North East. It is crucially important that the listings service, both hard copy and

online, contains information not only on the venue but also transport links and other information that adds value to the jazz event. Information should carry details of price, special offers, series discounts etc. and information should be snappy, informative, carry strong visual images where possible, and does not just preach to the converted. Please see appendix 10.

Actioned by Jazzaction and Jazz North East in conjunction with Arts Council England, North East, The Sage Gateshead and On the Case music listings.

#### 2.4.8 Recommendation 7

##### 2.4.8.1 Recording studios and music shops

Develop an online database with information on recording studios and music shops useful to the jazz community, with links to other sites such as Generator and Explore Music at Gateshead Borough Council.

Actioned by Jazzaction.

#### 2.4.9 Recommendation 8

##### 2.4.9.1 Jazz Education

When the new Tyneside building is occupied, it is hoped that it will maintain its outreach work and programming with a fair proportion of jazz. Also, that The Sage Gateshead will work whenever possible with other promoters and make their facilities available to jazz musicians/educators and other practitioners. It is also hoped that The Sage Gateshead will follow the example of London's South Bank and Barbican. Both of those settings have done much to broaden access to jazz with full programmes of free 'foyer jazz'.

Until recently Jazzaction has been the only regional jazz development agency, and given the achievements to date of Jazzaction, every effort should be made to ensure, not only its continuation, but also its growth.

Jazzaction should receive project funding to conduct an audit of jazz education needs of the LEA music services, schools and other jazz education initiatives in the region with a view to effecting contacts with jazz musicians who have the requisite education and training skills to help meet those needs. It is hoped that Jazzaction will work with Jazz Services in the delivery of training to enable musicians and teachers across the region to deliver jazz education at all levels. (See 2.4.10.1.1 below)

Actioned by Jazzaction, Arts Council England, North East, The Sage Gateshead and Jazz Services.

#### 2.4.10 Recommendation 9

##### 2.4.10.1 Key organisations

###### 2.4.10.1.1 Jazzaction

- Jazzaction develops an action programme with mission statement, goals and quantified objectives that incorporates present and proposed activity, and activity recommended in this report.
- Jazzaction registers itself as a charity or some other form of not for profit organisation and appoints a board of trustees with an elected chair.
- Jazzaction forms an advisory panel comprised of musicians, promoters, trade organisations e.g.: Musicians' Union, and other interested parties including Jazz North East and The Sage Gateshead.
- Jazzaction applies to Arts Council England, North East for project funding to undertake the recommendations set out in this report on a timetable agreed by its new board of trustees and Arts Council England, North East. The project funding would include additional human resources to undertake the work.
- Jazzaction works with Jazz Services and Trinity College London on the delivery of a pilot programme of certificates and diplomas for teaching jazz in the classroom aimed at musicians and teachers to help deliver jazz in and outside the classroom.

Actioned by Jazzaction and Arts Council England, North East in conjunction with Jazz Services.

###### 2.4.10.1.2 Jazz North East

- To continue to develop the Tyneside Jazz Festival
- To work with Jazzaction and On the Case Music Listings in developing Jazz in the North East into an online/hard copy listing publication with a much increased circulation.

###### 2.4.10.1.3 The Sage Gateshead

- Articulate a mission statement that provides a generalised statement of purpose and summarises its business plan and communicates this to the jazz community.

- Develop a communications policy so that the jazz community is regularly informed of future plans and activity.
- The Sage Gateshead develops a culture of co-operation and consultation, of 'selling' not 'telling'.
- The Sage Gateshead forms an advisory panel for jazz and consults with it on the formation of its policies and activities that will have an impact on jazz in the North East region.
- The Sage Gateshead works closely with Jazzaction on the development of touring circuits and all aspects of jazz in the region.



## **II Index to the report**

<b>Connecting for the Future</b>		
<b>- a review of Jazz in the North East of England</b>		<b>Page</b>
<b>1</b>	<b>Introduction</b>	<b>21</b>
1.1	Background	21
1.2	The Brief	21
1.3	The Review of Jazz in the North East	22
<b>2</b>	<b>Where we are now</b>	<b>22</b>
2.1	<b>The Landscape</b>	<b>22</b>
2.1.1	Geographical Area	22
2.1.2	Economic	22
2.1.3	Population	23
2.1.4	Education	24
2.1.5	Internet Access	25
2.1.6	The National Lottery 1999/2002	26
2.1.7	The Media	26
2.2	<b>The Landscape for Jazz</b>	<b>27</b>
2.2.1	Market Share by Area	28
2.2.2	Attendances at jazz and other art events in the North of England	29
2.2.3	Attendances for jazz in the North of England currently and attending concerts more than once a year in 2002/2003	30
2.2.4	Audience overlap for the UK	32
2.2.5	Profile of People who currently attend jazz in the North East	32
2.2.6	Percentage attending music events in the UK in the last 12 months, ending December 2003, by ethnic group	37
2.2.7	Attendance at jazz and other art events 30 minutes drive from major towns in the North East	38
2.2.8	Potential interest among non-attendees	39
2.3	<b>Musicians</b>	<b>39</b>

<b>2.4</b>	<b>Promoters</b>	<b>46</b>
<b>2.5</b>	<b>Promoters and Residencies</b>	<b>52</b>
<b>2.6</b>	<b>Disability information on venues in the North East</b>	<b>53</b>
<b>2.7</b>	<b>Live Music Venue Survey – Newcastle and Gateshead</b>	<b>54</b>
<b>2.8</b>	<b>Jazz Festivals</b>	<b>55</b>
2.8.1	Tyneside Jazz Festival	55
2.8.2	Borders Festival of Jazz and Blues	56
2.8.3	Whitley Bay International Jazz Festival (WBIJF)	57
2.8.4	The Sage Gateshead Festival	58
<b>2.9</b>	<b>Marketing</b>	<b>58</b>
2.9.1	Jazz UK	58
2.9.2	Distribution of Jazz UK	59
2.9.3	The Jazz Guide	59
2.9.4	Jazz News for the North East	60
2.9.5	Comparison of demographic profile of the jazz attendee with the reader of evening newspapers in the North East	61
2.9.6	On the case – music listings	61
2.9.7	The internet	62
<b>2.10</b>	<b>Recording studios</b>	<b>65</b>
<b>2.11</b>	<b>Music shops</b>	<b>66</b>
<b>2.12</b>	<b>Jazz education in the North East</b>	<b>66</b>
<b>2.13</b>	<b>Local authority arts departments and arts organisations</b>	<b>68</b>
<b>2.14</b>	<b>Key organisations</b>	<b>69</b>
<b>2.15</b>	<b>The Interviews</b>	<b>83</b>
2.15.1.1	What's right with jazz in the North East?	83
2.15.1.2	What's wrong with jazz in the North East	85
2.15.1.3	How would you like to see jazz in the North East develop?	86

<b>3</b>	<b>Conclusions, value chain and SWOT analysis</b>	<b>91</b>
<b>3.1</b>	<b>Conclusions</b>	<b>91</b>
3.1.1	The landscape	91
3.1.2	The landscape for jazz	91
3.1.2.1	Audience	91
3.1.2.2	The musicians	92
3.1.2.3	The promoters and venues	94
3.1.2.4	Festivals	96
3.1.2.5	Marketing	96
3.1.2.6	Recording studios	97
3.1.2.7	Music shops	97
3.1.2.8	Jazz education in the North East	97
3.1.2.9	Key organisations	98
	Jazzaction	98
	Jazz North East	98
	The Sage Gateshead (SG)	99
<b>3.2</b>	<b>Value chain analysis</b>	<b>100</b>
3.2.1	Introduction	100
3.2.2	Notes to value chain analysis	100
3.2.3	Value chain analysis	102
<b>3.3</b>	<b>SWOT analysis</b>	<b>103</b>
3.3.1	Introduction	103
3.3.2	SWOT analysis	103
<b>3.4</b>	<b>Key factors for success</b>	<b>103</b>
<b>3.5</b>	<b>Strategic issues</b>	<b>104</b>
<b>4</b>	<b>Recommendations</b>	<b>104</b>
<b>4.1</b>	<b>Introduction</b>	<b>104</b>
<b>4.2</b>	<b>Recommendation 1</b>	<b>104</b>
4.2.1	Time scale and action programmes	
<b>4.3</b>	<b>Recommendation 2</b>	<b>104</b>

4.3.1	The formulation of a strategy that will develop jazz in the North East of England	
4.3.2	Recommendation 2.1	106
4.3.3	Recommendation 2.2	106
<b>4.4</b>	<b>Musicians</b>	
4.4.1	Recommendation 3	107
<b>4.5</b>	<b>Promoters</b>	
4.5.1	Recommendation 4	107
<b>4.6</b>	<b>Festivals</b>	
4.6.1	Recommendation 5	108
<b>4.7</b>	<b>Marketing</b>	
4.7.1	Recommendation 6	108
<b>4.8</b>	<b>Recording studios and music shops</b>	
4.8.1	Recommendation 7	109
<b>4.9</b>	<b>Jazz education</b>	
4.9.1	Recommendation 8	109
<b>4.10</b>	<b>Key organisations</b>	
4.10.1	Recommendation 9	110

## **Appendices**

<b>1</b>	<b>Research Objectives</b>	<b>114</b>
<b>2</b>	<b>Research Survey of Jazz Musicians in the North East of England – December 2003</b>	<b>116</b>
<b>3</b>	<b>Research Survey of Promoters in the North East of England – December 2003</b>	<b>133</b>
<b>4</b>	<b>Jazz North East Annual Report 2002-2003</b>	<b>150</b>
<b>5</b>	<b>Jazz at the Exchange</b>	<b>152</b>
<b>6</b>	<b>Jazz Services Survey of Heads of Music Services in the North East and Cumbria</b>	<b>155</b>
<b>7</b>	<b>Jazz Services Survey of local authority arts departments and arts organisations in the North East and Cumbria</b>	<b>158</b>
<b>8</b>	<b>The Sage Gateshead Funding</b>	<b>161</b>
<b>9</b>	<b>People and organisations who have been interviewed</b>	<b>163</b>
<b>10</b>	<b>Broadening Access</b>	<b>165</b>
<b>11</b>	<b>Jazzaction Accounts 2001-2004</b>	<b>168</b>
<b>12</b>	<b>Jazz North East Accounts 2000-2003</b>	<b>169</b>

## **II The Report**

### **Connecting for the Future – a review of Jazz in the North East of England**

#### **1 Introduction**

##### **1.1 Background**

Jazz Services Ltd (JSL) is funded by Arts Council England to provide a voice for jazz; promoting its growth, accessibility and development in the UK by providing services in information, touring, education, communications, marketing, advocacy and publishing. JSL was commissioned by Arts Council England, North East to conduct a review of jazz in the North East of England.

##### **1.2 The brief**

- 1.2.1 To conduct an audit of the range of jazz genres and their provision in the region: of venues, marketing, audiences, promotion, festivals, commission, composition, education, recording, continuing professional development of musicians, residences, performances.
- 1.2.2 To make recommendations for the future development of jazz in the region with particular attention paid to the respective roles of Jazzaction, The Sage Gateshead, the region's promoters and the vision of Arts Council England, North East.
- 1.2.3 To make recommendations on priorities for educational development of jazz in the region.
- 1.2.4 To recommend strategic interventions designed to enhance the profile and encourage innovation in new jazz forms.

Appendix 1 contains research objectives and methodology.

### **1.3 The review of jazz in the North East**

This report has been written with a view to answering two crucial questions: "where is jazz in the North East now?" and "where do the participants see future jazz activity in the region?" To arrive at the starting line, this report examines:

- Where we are now
- Where we are now in terms of strengths and weaknesses
- Future opportunities for jazz in the North East
- Future threats facing jazz in the North East
- And defines the key success factors and strategic issues
- Makes recommendations

It should be noted that 'strengths and weaknesses' relate to jazz in the North East and are 'inside' factors. 'Opportunities and threats' refer to 'outside' factors that can affect the future of jazz in the North East.

## **2 Where we are now**

### **2.1 The landscape**

#### **2.1.1 Geographical area**

The North East is defined as the counties of Durham and Northumberland, metropolitan authorities of Gateshead, Newcastle upon Tyne, North Tyneside, South Tyneside, Sunderland and unitary authorities of Darlington, Hartlepool, Middlesbrough, Redcar and Cleveland and Stockton on Tees.

#### **2.1.2 Economic**

The region has seen enormous change over the past 30 years. Between 1981 and 1997, for example, the North East lost over 110,000 jobs in primary and manufacturing industries. Although less than 20% of the workforce is still employed in manufacturing, the sector remains an important element in the economy.

The regional economic base has diversified into new areas such as microelectronics, the offshore industry, biotechnology and automotives. There has also been significant growth in the service sectors, public

administration, education and health. Retail is also an important sector accounting for some 10% of all businesses, whilst tourism is estimated to support over 55,000 jobs in the region and overseas visitors to the region stayed 3,871 nights and spent £169 million.<sup>1</sup>

Despite this diversification, the region is still dealing with the economic, social and structural consequences of its past dependence on traditional industries, which is reflected in its poor performance across a range of indicators. As a result there are wide regional variations in terms of deprivation. Over 30% of Wards in the region fall within the 10% most deprived in England under the DTLR Index of Multiple Deprivation 2000, with four in Tees Valley in the top ten most deprived in the country. Significant clusters of deprivation exist on Tyneside, Wearside and Teesside. There is also evidence of isolated patches of deprivation in rural areas of Durham, Northumberland and Tees Valley.

North East England has the highest overall unemployment as a percentage of those aged 16 and over of all government office regions (excluding London) of 7.4% in the period March 2001 to February 2002.<sup>2</sup>

Youth unemployment is a major problem. The unemployment figure of 19% for the 16-19 age groups is the highest in the country and has risen to 25-50% in some inner city estates.<sup>3</sup>

### **2.1.3 Population**

The population in the region in 2002 was 2.513 million, a reduction of 74,000 (2.8%) from 1991, with 1.21 million males (45.5%) and 1.294 million females (51.5%).<sup>4</sup>

Within the age structure of the population, 5.3% are aged 0-4 years, 78% are aged 5-64 years and 16.7% are aged over 65.<sup>5</sup>

Approximately 2.4% of the region's total population belong to ethnic minorities. Of these, half are of Asian or British Asian origin.<sup>6</sup>

---

<sup>1</sup> Regional Trends 38 2004 Edition. Pub National Office of Statistics, P130

<sup>2</sup> Source: Government Office for the North East, June 2003

<sup>3</sup> [www.generator.org.uk/info.demographics](http://www.generator.org.uk/info.demographics)

<sup>4</sup> Ibid 1, P40

<sup>5</sup> Ibid 1, P41

<sup>6</sup> Ibid 1, P43



## 2.1.4 Education

- Number of schools and pupils in the North East of England

Education Establishment	Number of Schools	Number of Pupils
Nursery	47	3840
Primary	959	226190
Secondary	213	180360
Special	68	5990
Independent	37	13470
City Technology Colleges and Academies	3	3810
<b>Total</b>	<b>1327</b>	<b>433660</b>

Table 1

Source: Regional Trends 38 2004 Edition. Stats as at January 2003.

- Number of starts on the New Deal 18-24 year olds

	All People (thousands)		
	2000	2001	2002
North East	13.7	13.0	12.3

Table 2

Source: Regional Trends 38 2004 Edition

- Maintained Secondary Schools number and percentage of pupils by ethnicity

Ethnicity	Number of Pupils	Percentage %
White British	164830	91.4
Other white background	810	0.5
Mixed	950	0.5
Asian	2750	1.5
Black	300	0.2
Chinese	400	0.2
Any other ethnic background	390	0.2
Unclassified (information refused or unattained)	9890	5.5
<b>Total</b>	<b>180320</b>	<b>100</b>

Table 3

Source: Regional Trends 38 2004 Edition. Stats as at January 2003.

- The region has five universities, one Open University regional centre, a supporting resource centre and 25 further education establishments.

### 2.1.5 Internet access

The proportion of households in the North East of England with access to the internet in the financial year 2001/2002 was 32%. This can be compared to London and the South East where nearly half of all households had internet access (48%).

#### 2.1.5.1 Percentage of people in the North East accessing the arts through audio/visual and online media.

	<b>Accessed within the Last Four Weeks</b>			
	<b>CD, Mini disk, tape/ record</b>	<b>TV, Video, Radio</b>	<b>DVD</b>	<b>Base</b>
	<b>%</b>	<b>%</b>	<b>%</b>	
<b>North East</b>	85	74	67	343
<b>National Average</b>	85	81	68	6042

Table 4

Source: Arts in England, attendance, participation and attitudes in 2001. Arts Council England 2002.

	<b>Accessed within the Last Twelve Months</b>		
	<b>Bought tickets via internet</b>	<b>Internet</b>	<b>Base</b>
	<b>%</b>	<b>%</b>	
<b>North East</b>	13	5	343
<b>National Average</b>	14	9	6042

Table 5

Source: Arts in England, attendance, participation and attitudes in 2001. Arts Council England 2002.

### 2.1.6 The National Lottery 1999/2002

The North East and the West Midlands spent the most on the National Lottery between 1999 and 2002, with an average weekly household expenditure of £4.50. In terms of the number of grants awarded, the North East received the fewest grants awarded (5175) next to Northern Ireland (4133).

### 2.1.7 The media

The North east is covered by BBC North East and Cumbria and ITV Tyne Tees TV.

Radio forms an important part of the total media communications mix in the North East. According to the My UK survey (2003), 68% of the population regarded local radio in general and local commercial radio in particular as important or very important in contributing to regional identity. This was the highest score for any region. The North East also placed regional television higher than any other region, with 80% regarding it as important or very important.

The North East's consumption of national daily newspapers is exactly in line with the national average. The North East is above average in its reading of the national popular press, but below average in its reading of the national mid-market and quality press. These results are consistent with the demographics of the region (see below).

Although the North East seems to be below the national average in its consumption of regional newspapers, it is still the case that 4 out of 5 adults see at least one regional newspaper on a regular basis. Morning and evening regional newspapers seem to be particularly popular, with the North East exceeding the national average by more than 5% in both cases.

#### 2.1.7.1 Regional titles circulating in the North East

	<b>Total</b>	<b>Morning</b>	<b>Evening</b>	<b>Sundays</b>	<b>Weekly paid</b>	<b>Weekly free</b>
No. of titles	51	5	8	2	10	26
Total audited circ	2,337,713	287,845	445,426	167,125	185,094	1,252,223
Total audited wkly circ	5,951,357	1,674,359	2,672,556	167,125	185,094	1,252,223
Total isba audited circ	1,769,845	111,379	259,920	86,266	118,696	1,193,584
Total isba audited wkly circ	3,626,340	668,274	1,559,520	86,266	118,696	1,193,584

Table 6

Source: The Newspaper Society Intelligence Unit – North East Incorporated Society of British Advertisers (ISBA) region fact sheet, December 2003.

### 2.1.7.2 Local radio

Station	Adult (15+)	Weekly reach		Share of listening
	Pop'n '000	'000	%	%
BBC Radio Cleveland	774	120	17	6.9
BBC Radio Newcastle	1325	220	17	10.2
Century FM	2101	507	24	11.1
Galaxy	2101	485	23	9.3
EMAP Radio North East	2110	766	36	18.3
Big City Network North East	2110	651	31	12.4
Metro Radio	1379	461	33	13.6
TFM	791	193	24	9.7
Magic Network NE	2110	215	10	5.9
Magic 1152 (Newcastle)	1379	121	9	5.1
Magic 1170 (Teesside)	791	94	12	6.5
Metro Radio Magic 1152	1379	519	38	18.7
TFM Magic 1170	791	249	32	16.2
Alpha 103.2	127	36	28	12.8
Sun FM	236	68	29	17.9

Table 7

Source: Quarterly Summary of Radio Listening, period ending 21 March 2004 RAJAR 6 May 2004

Notes: Weekly reach: The number in thousands or as a percentage of the UK/area adult population who listen to a station for at least five minutes in the course of an average week.

Share of listening: The percentage of total listening time accounted for by a station in the UK/area in an average week.

## 2.2 The landscape for Jazz

### 2.2.1 Market share by area<sup>7</sup>

Region	Population Age 15-65+ '000s	% of people who currently attend and the numbers of people who currently attend					
		Jazz %	Pop '000s	Classical %	Pop '000s	Rock & pop %	Pop '000s
North	2,499	4.1	102	7.1	177	18.9	472
North West	5,177	5.7	295	10.9	564	20.2	1,045
Yorkshire & Humberside	3,828	5.3	202	9.8	375	20	765
East Midlands	3,617	5.7	206	12.1	437	23.9	864
West Midlands	4,310	4.3	185	10.3	443	21	905
East Anglia	1,751	6.2	109	9.2	161	18.7	327
South East	9,016	6.5	586	13	1,172	24.7	2,226
Greater London	5,768	9.7	559	16	923	25.2	1,453
South West	3,950	6	237	13.1	517	21	829
Wales	2,370	3.9	92	9.8	232	19.8	469
Scotland	4,149	5.1	212	9.5	394	23.4	970
<b>Total</b>	<b>46,435</b>	<b>6</b>	<b>2,786</b>	<b>11.6</b>	<b>5,397</b>	<b>22.2</b>	<b>10,325</b>

Table 8

Source: Target Group Index, Summary of Results BMRB 1999/2000. The figures include Cumbria

Table 8 illustrates the audience for jazz, classical music and rock and pop on a regional basis. The national average for people who currently attend jazz events is

<sup>7</sup> Verwey P (1999/2000), Target Group Index – Summary of Results. Arts Council England

6% and 11.6% for classical music. Attendances for jazz and classical music in the North of England are below the national average.

### 2.2.2 Attendances at jazz and other art events in the North of England

Year	1994/5 + 1995/6 %	1996/7 + 1997/8 %	1997/8 + 1998/9 %	1998/9 + 1999/2000 %	2001/2 + 2002/3 %
<b>Currently Attend</b>					
Plays	15.9	17.4	16.9	16.3	17.4
Ballet	4.7	4.3	4.3	4.4	4.7
Contemporary Dance	2.1	2.9	3.0	3.4	4.6
Opera	4.2	4.0	3.6	3.9	4.7
Classical Music	6.3	6.4	7.2	7.5	7.7
<b>Jazz</b>	<b>3.4</b>	<b>3.6</b>	<b>4.0</b>	<b>3.9</b>	<b>3.7</b>
Art Galleries/ Exhibitions	14.6	18.6	17.4	16.1	18.2
Cinema	47.5	48.3	50.4	51.1	53.9
Pop/Rock	19.2	20.5	20.0	19.1	23.2

Table 9

Source: Peter Verwey, Target Group Index 1994/2003, Summary of Results for England, the English regions, Scotland and Wales. Publisher Arts Council England.

Notes: Percentages show the percentage of adults in the North of England who attend jazz concerts or performances. These figures for the North include Cumbria.

In table 7, the attendance figures are a bi-annual aggregate. Some art forms such as plays, classical music, cinema, pop and rock have shown a steady growth in attendance. Contemporary dance has doubled its audience in less than ten years. Jazz, like opera and ballet, has appeared to have reached a plateau.

**2.2.3 Attendances for jazz in the North of England currently and attending concerts more than once a year in 2002/2003**

	Jazz	
	All Adults %	North %
<b>Currently Attend</b>	6.4	4.5
<b>Attend more than once a year</b>	1.8	2.2

Table 10

Source: Peter Verwey, Target Group Index 2002/2003, Summary of Results for Great Britain. Publisher Arts Council England.

Notes: The percentages show the number of adults who attend currently and more than once a year. For example 2.2% of adults attend more than once a year in the North (compared with 1.8% of all UK adults). These figures for the North include Cumbria.

In table 10, the figure 4.5% is the audience figure for 2002/2003 and is higher than the aggregate figure for the two year period 2001/2003 in table 8.

The table below examines the single year audience figures for jazz in the North East.

### Attendances at jazz events 1994/2003

	1994/1995		1995/1996		1996/97		1997/98		1998/99		1999/2000		2000/02		2002/03	
	All %	North %	All %	North %	All %	North %	All %	North %	All %	North %	All %	North %	All %	North %	All %	North %
<b>Currently Attend</b>	6.2	3.7	6.4	3.4	6.2	3.3	5.7	4.3	5.8	3.8	6.0	4.1	Not Known	6.4	4.5	
<b>Attend more than once a year</b>	1.7	1.7	1.8	0.5*	1.7	1.0*	1.6	1.1*	1.5	1.5	1.6	1.5*	Not Known	1.8	2.2*	

Table 10.1

Source: Peter Verwey, Target group Index 1994/2003, Summary of Results for Great Britain. Publisher Arts Council England

\* Number of respondents on which percentages based is too small to be reliable.

Notes: The percentages show the number of adults who attend currently and attend more than once a year. These figures for the North include Cumbria.

The numbers of people currently attending a jazz event has fluctuated over the nine year period 1994/2003. However, the core audience, defined as those people who attend more than once a year, remains between 1.7% and 1.5% in terms of reliable statistical data. This again suggests that audience numbers have reached a plateau.



## 2.2.4 Audience overlap for the UK

<b>% of attendees at the performances listed below who attend jazz</b>	<b>Jazz %</b>
All Adults	6.4
Any Theatre Performance	13.6
Plays	18.3
Ballet	28.9
Contemporary Dance	41.5
Opera	29.4
Classical Music	28.6
Art Galleries/Exhibitions	19.4
Cinema	8.6
Pop/Rock	15.3

Table 11

Source: Peter Verwey, Target Group Index 2002/2003, Summary of Results for Great Britain. Publisher Arts Council England.

Notes: Audience overlap is the percentage of attendees at a given type of arts event who also attend other arts events. The percentages show attendance at jazz events by other arts attendees. For example, 41.5% of adults who currently attend contemporary dance attend jazz.

The table above shows the levels of attendances at jazz events of those people who attend dance, opera etc. 30% of ballet, opera and classical music audiences also attend jazz events and 15% of pop and rock audiences attend jazz. The interesting fact that 41% of people who attend contemporary dance also attend jazz events should help marketing initiatives aimed at building the core audience.

## 2.2.5 Profile of people who currently attend jazz in the North East

### 2.2.5.1 Gender

	<b>North East Population</b>	<b>Jazz</b>
Sample	3672	136
<b>Gender</b>	<b>%</b>	<b>%</b>
Men	45.3	50.7
Women	54.7	49.3
<b>Total</b>	<b>100</b>	<b>100</b>

Table 12

Source: Peter Verwey, Target Group Index 2001/2002 and 2002/2003, Summary of Results for England, the English regions, Scotland and Wales. October 2003.

Notes: Percentages are based on the sample at the head of each column. For example, 49.3% jazz attendees in the North East are women, while 54.7% of all adults in the North East are women. The figures for the North east exclude Cumbria.

The audience for jazz in the North East is evenly split between men and women.

#### 2.2.5.2 Age

	<b>North East Population</b>	<b>Jazz</b>
Sample	3672	136
<b>Age</b>	<b>%</b>	<b>%</b>
15-24	9.5	7.4
25-34	15.1	14
35-44	19.5	13
45-54	17.5	26
55-64	17.3	23.5
65+	21.1	16.1
<b>Total</b>	<b>100</b>	<b>100</b>

Table 13

Source: Peter Verwey, Target Group Index 2001/2002 and 2002/2003, Summary of Results for England, the English regions, Scotland and Wales. Publisher Arts Council England, October 2003.

Notes: Percentages are based on the sample at the head of each column. For example, 7.4% of jazz attendees in the North East are aged between 15-24, while 9.5% of all adults in the North East are aged between 15-24.

Table 13 shows the distribution of the population in the North East as compared to the age distribution of the audience for jazz. The age range 15-44 years for jazz is below the population distribution in the north but above for those jazz attendees aged 45 to 64. The watershed between 15-44 and 45-64 has implications for marketing in terms of providing online and hardcopy listings and publicity.

### 2.2.5.3 Social grade

	<b>North East Population All Adults</b>	<b>Jazz</b>
Sample	3672	136
<b>Social Grade</b>	<b>%</b>	<b>%</b>
AB	10.3	28.3
C1	28.2	33.2
C2	24.1	10.2
DE	37.4	28.3
<b>Total</b>	<b>100</b>	<b>100</b>

Table 14

Source: Peter Verwey, Target Group Index 2001/2002 and 2002/2003, summary of Results for England, the English regions, Scotland and Wales. Publisher Arts Council England, October 2003.

Notes: Percentages are based on the sample at the head of each column. For example, 28.3% of jazz attendees in the North East are AB social grade, while 10.3% of all adults in the North East are AB social grade.

Table 14 compares the social grade of the audience for jazz with the distribution of social grades in the North East generally. Jazz, as all the other art forms, has a propensity to attract above average audiences from social grades AB and C1. The message from these figures is that efforts must be made to ensure an even distribution through the social grouping for jazz by developing audiences in the C2 and D social groupings.

### 2.2.5.4 Terminal education age

	<b>North East Population All Adults</b>	<b>Jazz</b>
Sample	3672	136
Education	%	%
Still Studying	4.7	2.6
19 or over	11.6	34.2
17/18	12.6	23.6
16 or younger	71.1	39.6
<b>Total</b>	<b>100</b>	<b>100</b>

Table 15

Source: Peter Verwey, Target Group Index 2001/2002 and 2002/2003, Summary of Results for England, the English regions, Scotland and Wales. Publisher Arts Council England, October 2003.

Notes: Percentages are based on the sample at the head of each column. For example, 34.2% of jazz attendees in the North East finished education at 19 or later, while 11.6% of all adults in the North East continued their education beyond 19 years of age.

Table 15 highlights the fact that there are above average audiences from people who continued their education beyond the age of 16 and below average from people who finished education at 16 years or younger. Again this has implications for audience development in terms of growing audiences amongst those people who finished their education at 16 or younger.

#### 2.2.5.5 UK readership of national daily newspapers

<b>% of readers who currently attend</b>	<b>Jazz %</b>
All Adults	6.4
Daily Express	6.9
Daily Mail	7.9
Daily Star	2.5 *
Daily Telegraph	15.4
Financial Times	38.5 *
The Guardian	26.5
The Independent	15.8
The Sun	1.8
The Times	15.3

Table 16

\* Number of respondents on which percentage based is too small to be reliable. Figure given only for consistency.

Source: Peter Verwey, Target Group Index 2002/2003, Summary of Results for Great Britain. Publisher Arts Council England.

Notes: The Percentage show the number of adults who read particular newspapers and attend jazz. For example, 26.5% of Guardian adult readers attend jazz (compared with 6.4% of all adults).

### 2.2.5.6 National readership of Sunday newspapers

<b>% of readers who currently attend</b>	<b>Jazz %</b>
All Adults	6.4
Mail on Sunday	7.2
News of the World	2.7
Sunday People	1.6
Sunday Express	5.8
Sunday Mirror	3.9
Sunday Telegraph	14.9
The Observer	23.4
Sunday Times	16.1
Independent on Sunday	11.2 *

Table 17

\* Number of respondents on which percentage based is too small to be reliable. Figures given only for consistency.

Source: Peter Verwey, Target Group Index 2002/2003, Summary of Results for Great Britain. Publisher Arts Council England.

Notes: The percentages show the number of adults who read particular Sunday newspapers and attend jazz. For example, 23.4% of The Observer adult readers attend jazz (compared with 6.4% of all adults).

### 2.2.5.7 Readership of English Regional or Scottish or Welsh Newspapers

<b>% of readers who currently attend</b>	<b>Jazz %</b>
All Adults	6.4
Any English Regional or Scottish or Welsh Evening	5.3
Any English Regional or Scottish or Welsh Morning	7.5
Any Local Weekly (paid for)	6.4
Any Local weekly (free)	6.5

Table 18

Source: Peter Verwey, Target Group Index 2002/2003, Summary of results for Great Britain. Publisher Arts Council England.

Notes: The percentages show the number of adults who read particular regional newspapers and attend jazz. For example, 6.5% of the local weekly free newspaper adult readers attend jazz (compared with 6.4% of all adults).

Tables 16, 17 and 18 reinforce the fact of the propensity for jazz to attract an above average audience in terms of number of attendees who are from AB or C1 social grades. For example 15% of readers of the Daily Telegraph and The Independent attend jazz events with a quarter of readers of The Guardian attending jazz events. However, with regard to readers of local newspapers, less than 10% of them will attend jazz events. This has implication in terms of marketing to audience via local newspapers.

### 2.2.6 Percentage attending music events in the UK in the last 12 months, ending December 2003, by ethnic group

Event	White	Asian or British Asian			Black or British Black			Mixed ethnicity	Chinese & other ethnic groups	All
		Indian	Pakistani, Bangladeshi	Asian All+	Black Caribbean	Black African	Black All**			
Percentage										
Jazz concert	6	4	1	3	9	6	7	8	3	5

Table 19

+ Including other Asian groups not shown separately. \*\* Including other Black groups not shown separately

Respondents could mention more than one event.

Source: Research Report, 31 December 2003. Focus on Cultural Diversity: the arts in England attendance participation and attitudes.<sup>8</sup>

As shown in Table 19, levels of attendance for jazz concerts were lowest amongst the Pakistani, Bangladeshi and Chinese communities. They were above the average of 5% for Black and Mixed Ethnicity audiences. All though these statistics are for the UK, they are never the less helpful in ensuring that diverse communities are reached in terms of marketing and promotion.

<sup>8</sup> Research Report 34 December 2003. Focus on Cultural Diversity: the arts in England attendance, participation and attitudes. Office of National Statistics, Bridgewood/Fern/Dust/Hutton/Skelton/Skinner.

**2.2.7 Attendances at jazz and other art events 30 minutes drive time from major towns in the North East**

Town	Berwick	Darlington	Hexham	Middlesbrough	Newcastle upon Tyne	Stockton on Tees	Sunderland
Art Form & percentage of people who currently attend	%	%	%	%	%	%	%
Plays	17.1	18.4	22.9	18.1	17.8	17.8	17.2
Ballet	4.9	5.6	7.6	5.4	5.2	5.3	5.0
Opera	5.3	6.1	8.5	5.9	5.8	5.8	5.5
Contemporary Dance	2.8	3.1	3.9	3.0	3.0	3.0	2.9
Classical Music	8.4	8.9	12.1	8.3	8.6	8.4	8.4
<b>Jazz</b>	<b>4.2</b>	<b>4.8</b>	<b>6.3</b>	<b>4.6</b>	<b>4.6</b>	<b>4.6</b>	<b>4.5</b>
Art Galleries	17.1	19.6	23.5	19.0	19.5	18.9	19.2
Theatre	29.8	32.8	37.8	32.0	31.8	31.8	30.7
Cinema	41.7	47.3	47.0	47.3	47.0	47.1	46.9

Table 20

Source: Arts Council England, Area Profile Data, 1996.

Table 20 shows that, with the exception of Hexham, the jazz audience is evenly distributed through the region.

## 2.2.8 Potential interest among non-attendees

<b>% who do not currently attend these events but who like to watch on television</b>	<b>North %</b>
Jazz	3.4

Table 21

Source: Peter Verwey, Target Group Index 2001/2002 and 2002/2003, Summary of Results for England, the English regions, Scotland and Wales. Publisher Arts Council England, October 2003.

Table 21 indicates the potential for growing the existing audience for jazz. There are currently 3.4% of people in the North of England who watch jazz on the television but do not attend jazz events. It would be of immense benefit to ascertain what the 'barriers' are to their attending jazz events.

## 2.3 Musicians

### 2.3.1 Introduction

A survey of musicians was undertaken in December 2003 through a self completion questionnaire mailed to a sample of 88 musicians drawn from the databases of Jazz Services, Jazzaction and the Musicians' Union. Thirty two completed questionnaires were returned, a response rate of 37%.

Please see appendix 2 for the full results of the survey.

### 2.3.2 The results

Set out below are the results pertinent to this report.

#### 2.3.2.1 How long have you been playing jazz?

75% of the respondents have been playing jazz for over 25 years, 16% have been playing between 10 and 20 years, with only 9% of musicians playing between 5 and 10 years. There were no respondents who had been playing for 1 to 5 years.



### 2.3.2.2 Which of the following types of jazz are you currently involved in?

<b>BASE</b>	<b>32</b>
Big band	23%
Mainstream	21%
Contemporary	13%
New Orleans	12%
R'n'B/Blues	11%
Latin	10%
Classic Bebop	9%
Jazz Fusion/Funk	9%
Post Bop	8%
World music	8%
Other	6%

Table 22

Big band and mainstream are the genres performed by a quarter of the musicians, with other genres played by from 8% to 13% of the musicians.

### 2.3.2.3 How often do you rehearse with your band?

28% of musicians rehearse weekly, 56% rehearse when necessary and 9% don't rehearse at all.

### 2.3.2.4 How do you get or choose gigs?

Two thirds of musicians actively seek work, a third use an agent and two thirds either organise self promotions or advertise their band.

### 2.3.2.5 In a typical week, how many hours do you spend on performing, teaching etc?

Respondents spent 55% of their time playing jazz gigs, 10% of their time teaching and 5% on music related business.

### 2.3.2.6 Approximately how many jazz gigs were undertaken between October 2002 and September 2003? How many were paid at or above the Musicians' Union minimum gig rate of £47.50?

Respondents played an average of 47 gigs in the 12 month period and an average of 32 gigs was paid at or above the minimum Musicians' Union gig rate.

### 2.3.2.7 Where the bands perform

26% of respondents played in jazz clubs, 28% played at functions such as weddings and dances, with 9% of the respondents playing concert hall gigs and 11% working in arts centres. 4% worked at theatres, 6% at outdoor events, and 3% at corporate events, 5% worked in restaurants and curiously only 6% of the respondents worked in pubs.

In general, 64% of the bands played to audiences who had come specifically to listen to the band and 36% of the respondents played background music.

### 2.3.2.8 How aware do you feel you are of funding opportunities from any of the following bodies?

BASE	32		
	Aware of All %	Aware of Some %	Not Aware %
Arts Council England	22	50	28
Jazzaction	19	47	31
Jazz Services	19	31	47
British Council	3	0	88
European funds	6	3	81
Dept of Education	9	25	59
Local Authorities	13	28	53
Youth Music	9	16	66
Musicians Union	31	28	41
Lottery funding	6	31	50
PRS Foundation	9	9	72
Trusts	3	16	72
Commercial sponsors	3	25	63

Table 23

There is a low level of awareness of funding opportunities.

2.3.2.9 Have you ever received funding from any of these?

BASE	32		
	Once %	More than once %	Never %
Jazzaction	13	28	38
Arts Council England	22	25	41
Jazz Services	0	9	63
British Council	3	0	66
European funds	0	3	66
Dept of Education	0	13	56
Local Authorities	9	16	53
Youth Music	0	3	66
Musicians Union	9	34	41
PRS Foundation	3	0	63
Lottery funding	0	3	66
Trusts	3	6	59
Commercial sponsors	0	19	56
Other, please specify	0	0	0

Table 24

41% of musicians have received funding from Jazzaction and 47% have obtained funding from Arts Council England. However, there are low levels of take up for Jazz Services, PRS Foundation etc.

2.3.2.10 Where do you find out about information to help you get jazz gigs?

BASE	32
	Yes %
Jazzaction	34
Jazz Services	22
Internet	31
Jazz UK	28
Local Press	53
National press	22
Radio	13
TV	16
From promoters directly	44
From friends and colleagues	75
Other, please specify	6

Table 25

75% of musicians get information on work opportunities from their own networks i.e.: friends and colleagues, 44% from promoters directly and 58% from local press. In terms of jazz organisations, 34% of musicians receive information on work opportunities from Jazzaction, 22% from Jazz Services, 28% from Jazz UK and 31% from the internet.

#### 2.3.2.11 Usage of jazz organisations' websites by musicians

- 6% of musicians visited Jazzaction's website often, with 47% having visited but not recently and 41% never visiting the site.
- No musicians visit Jazz Services' website regularly, but 47% have recently visited the site and 44% of musicians have never visited the site.
- Only 25% of the respondents had put information on the Jazz Services' website.

#### 2.3.2.12 Where musicians work

- 79% of the musicians worked in the North East and 21% worked outside the North East.
- When playing outside the North East, only 34% of musicians were usually or often paid travel expenses.
- On average, musicians have been employed by two promoters in the North East.

#### 2.3.2.13 Inhibiting factors in career development

The factors that jazz musicians in the North East perceived as impeding their career were:

- lack of gigs
- lack of contacts
- unawareness of funding opportunities
- lack of venues

Seven respondents felt they were held back by lack of promoting/marketing skills, but it is ranked as a lower priority than 1. Similarly, seven respondents felt there was a difficulty in organising national tours. Again it is ranked as a lower priority than 1.

2.3.2.14 Actions to develop musicians careers

How would you like to develop your career? Please tick the boxes in order of priority with No 1 as most important and No 5 as least important.

<b>BASE</b>		<b>32</b>					
<b>Priorities</b>		<b>BASE</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
		<b>32</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
<b>1</b>	Having more opportunities to perform locally	21	52	19	14	0	14
<b>2</b>	Performing nationally and internationally	17	53	47	0	0	0
<b>3</b>	Training in self-promotion/ marketing your band	15	0	13	47	33	7
<b>4</b>	Networking opportunities	14	0	29	29	7	36
<b>5</b>	Master classes to improve/ develop instrumental abilities	13	8	15	31	38	8
<b>6</b>	Learning more about composition/arranging	7	29	14	0	29	29
<b>7</b>	None, my career is progressing well	5	100	0	0	0	0
<b>8</b>	Other, please specify	2	0	50	0	50	0

Table 26

What would be the most useful way that Arts Council England, North East could assist you in your jazz-playing career? Please number five boxes below in order of importance, with No 1 as your first priority and No 5 as the last.

<b>BASE</b>		<b>32</b>					
<b>Priorities</b>		<b>BASE</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
		<b>32</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
1	Subsidising venues or residencies	20	30	40	25	5	0
2	Subsidising performances	17	53	18	24	6	0
3	Funds for special projects	14	21	21	36	21	0
4	Developing touring networks	11	0	36	27	27	9
5	Providing information and networking opportunities	8	50	13	0	38	0
5	Growing audiences	8	38	0	38	25	0
6	National touring support	7	0	43	29	14	14
6	Support recording work	7	14	29	0	57	0
7	Funds for commissioning and compositions	6	17	50	0	33	0
8	Providing support for career development	5	40	0	40	20	0
9	Other, please state	1	0	0	100	0	0
10	Don't know	3	67	0	0	33	0

Table 27

The priorities for career development are:

- More performance opportunities locally, nationally and internationally
- Training in self promotion/marketing your band
- Networking opportunities
- Improving and developing instrumental abilities and learning about composing and arranging

The priorities for help from Arts Council England, North East in developing careers are:

- Support for venues/residencies and performances
- Funds for special projects
- Developing touring networks

- Providing information and networking opportunities
- Developing touring networks and national touring support
- Support for recording
- Funds for commissioning and composition
- Providing support for career development

#### 2.3.2.15 Comments, suggestions, concerns and recommendations for jazz in the North East

The questionnaire asked musicians to write and note their concerns and recommendations on jazz in the North East. Set out below are the major points:

- More venues needed geared to jazz and related music. There is a lack of venues
- More needs to be done to raise the profile of jazz in the North East across all genres of jazz. Better publicity required
- Audience development
- The Sage Gateshead should create more opportunities for jazz
- Increased opportunities for young musicians to develop
- More rehearsal bands

#### 2.3.2.16 Demographics

- Only 6% of the respondents were aged between 25 and 34 years. There were no respondents under 25 years of age. 56% of musicians responding are aged between 45 and 64 years of age
- 87% of the respondents were male
- 91% of the respondents described themselves as white and 9% did not answer

## 2.4 Promoters

### 2.4.1 Introduction

A survey of promoters was undertaken in December 2003 through a self completion questionnaire mailed to a sample of 44 promoters drawn from the databases of Jazz Services, Jazzaction and Arts Council England, North East. There was a response rate of 28% with 12 completed questionnaires.

Please see appendix 3 for the full results of the survey.

## 2.4.2 The results

Set out below are the results germane to this report.

### 2.4.2.1 Styles of jazz and music promoted

The venues promoted a wide range of music genres including 204 jazz gigs, 180 rock and pop, 57 folk, 26 classical and 24 blues gigs.

In terms of the genres of jazz promoted, Table 27 below sets out the various styles of jazz ranked in order of the amount of jazz promoted.

<b>BASE</b>	<b>12</b>
	<b>%</b>
New Orleans/traditional	23
Mainstream	18
Big band	13
Classic be-bop	10
Contemporary	7
Post-bop	7
Free improvisation	7
Jazz fusion/funk	4
World music	4
Other, please specify	4
Original composition	
R'n'B	2
Latin	1

Table 28

### 2.4.2.2 Length of time promoting in the North East

25% of the respondents have been promoting between 2 to 5 years, 25% between 5 to 10 years and 25% over 10 years. There were no respondents who had been promoting less than 2 years.



#### 2.4.2.3 Type of promoter

<b>BASE</b>	<b>12</b>
	<b>%</b>
Professional individual promoter attached to a venue	42
Parts of a group of voluntary promoters	25
An individual voluntary promoter	17
Part of professional group of promoters	8
A professional promoter unattached to a venue	0
Other	0
N/A	8

Table 29

50% of the promoters are professional promoters and 42% are voluntary promoters.

#### 2.4.2.4 Types of jazz musicians and bands promoted over a year

40% of local musicians and bands were promoted with 45% of national bands and 15% international bands and musicians.

#### 2.4.2.5 Comments made about venues by promoters

The questionnaire asked promoters to comment on venues. Set out below is a distillation of their comments:

- More venues needed with a capacity of 150 and with a PA, piano, bar snacks, reasonable bar prices and dressing rooms
- Pianos are a problem. Lack of good pianos in venues
- Help with developing bigger audiences and reaching young people

#### 2.4.2.6 Size of the audience for jazz events

The average audience size is 75 people.

#### 2.4.2.7 Jazz education workshops promoted in the past 12 months

There have been an average 0.3 education workshops promoted.

#### 2.4.2.8 Apportionment of income by source

<b>BASE</b>	<b>12</b>
	%
Ticket/box office sales	41
Public grants, guarantees or sponsorship	26
Other source of income	6
Don't know	6
Venue hire (public events)	6
Catering facilities	5
Commercial/corporate sponsorship	5
Venue hire (private functions)	3
Bar takings	1
Private charitable donations	1

Table 30

67% of income is generated by box office or public grants.

#### 2.4.2.9 Organisation applied to for funding

Table 29 sets out the organisations that promoters have ever applied to for funding. Arts Council England, North East and corporate sponsorship vie for first place with 58% of promoters applying to them for funds. Closely followed by local authorities, Jazzaction and the Lottery.

<b>BASE</b>	<b>12</b>
	%
Arts Council England, North East	58
Direct commercial/corporate sponsorship	58
Local authorities	50
Jazzaction	42
Lottery funding	42
Charities, trust and foundations	33
Musicians' Union	25
Other	17
British Council	8
EU Funding	8
PRS Foundation	8
Jazz Services	0

Table 31