THE VALUE OF JAZZ IN BRITAIN

Report commissioned by Jazz Services Ltd from

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CONTENTS

EXECUTIVE SUMMARY

1. Economic Data

The key economic findings of this mapping exercise for jazz are given in the following Table.

TABLE 1 12 Month Summary Economic Data for the UK Jazz Sector 2004-2005 (£ millions)

Source of revenue	**Amount of revenue (£ millions)**
Ticket sales	22.50
Band fees for ‘free to enter’ gigs	1.50
Public subsidy	4.15
Commercial sponsorship	0.60
CD sales (retail value) and PPL fees	39.50
Compositions and music publishing	4.95
Education	12.07
Other	1.50
TOTAL	**86.77**

Table 1 gives details of the annual turnover of the jazz sector of the UK music industry in 2004-2005. It is estimated that this reached £86.77 million.

The £22.50 million value of admission charges (ticket sales) has been grossed up from the data provided by the responses to a questionnaire sent to UK jazz promoters. In order to provide a more accurate estimate for turnover in the live sector, a similar calculation was made for the fees paid to musicians at performances without an entrance charge.

The data for subsidy and sponsorship can be found in Chapter 1. The figure for CD sales is based on the retail value of soundcarrier sales in the UK as published by the BPI on behalf of the record companies plus estimates for sales of CDs made by UK jazz musicians and for performance rights payments distributed by Phonographic Performance Ltd (PPL). The calculations for the amount paid for compositions and music publishing rights are to be found in Chapter 2. The data to support the education figure can be found in Chapter 6. The ‘Other’ amount in Table 1 includes broadcasting fees, recording session fees and miscellaneous sources reported in responses to a questionnaire sent to every jazz musician registered with Jazz Services Ltd and/or the Musicians’ Union.

2. Live Music Sector

Chapter 1 surveys current developments in the live sector. There are at least 45,000 jazz performances a year in the UK, ranging from sessions in pubs where no entrance fee is charged to concert hall and international festival events. Festivals remain a growth area. The income of promoters and musicians from admission charges is supplemented by public funding from arts councils and local authorities, and smaller amounts from arts charities and commercial sponsors.

3. Compositions and Music Publishing

Jazz compositions earn little in royalties since airplay is minimal in the UK and most recordings sell in small numbers. The most dynamic sector for jazz composers is the education market where tutor books and CDs sell in relatively large numbers.

4. Recordings

Chapter 3 shows that while UK consumers spent almost £40 million on jazz records in 2004, much of this was spent on reissues and compilations or a small number of international hit albums. Of the 1,000 or so ‘new’ releases of jazz CDs, between 200 and 300 contained newly recorded music. Independent UK labels (many owned by musicians) issuing new recordings expect to sell from a few hundred to one or two thousand copies of each release.

5. Print and Broadcast Media

Chapter 4 surveys jazz coverage in the London-based national press, finding greater attention to jazz in the ‘broadsheet’ papers. It also notes that regular broadcasting of jazz in concert or on record is limited almost entirely to BBC Radio 2 and 3. A survey of the specialist jazz press is included.

6. Audiences

Chapter 5 provides examples of recent audience research undertaken on behalf of Arts Council England, the Arts Council of Wales and others. This show a growing audience for jazz which is predominantly male, middle-aged and of socio-economic groups ABC1. While over 3 million UK adults have attended a jazz performance in the past year, the core audience for jazz is estimated to be about 500,000.

7. Jazz Education

Chapter 6 gives a detailed overview of the number of jazz students in higher and further education and the numbers of full and part-time teaching posts at all levels of the education system. There is also data on summer schools and private instrumental tuition.

8. Jazz Musicians in the UK

Based on the responses to the questionnaire Chapter 7 provides a profile of a large (33%) sample of over 2000 UK jazz musicians across a wide range of parameters. These include demographic data on age, gender and ethnicity, financial data on levels and sources of income and information on the instruments played and the main styles in which the musicians perform.

1. Live events and festivals

1.1 Audiences and number of Gigs

The researchers asked promoters to state how many performances they promoted in the previous 12 months. Table 2 shows that most promoters (55%) put on 20 or less shows per year (e.g. once or twice a month). But almost one quarter (23%) organised over 50 a year, that is at least one a week.

*TABLE 2 Jazz Promoters: the number of gigs promoted annually 2004-2005 (% of promoters)

Number of gigs	% of Promoters
1-10	37
11-20	18
21-30	10
31-40	5
41-50	7
50+	23

** where no Source is given for Tables, these are based on data from original research undertaken for this Report.*

Promoters were also asked to state the average size of the audience at the gigs they organised. Table 3 shows that two-thirds of promoters (67%) organised events with an average attendance of 100 or less. Only one in seven of promoters put on events with audiences of over 200.

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

average audience size	% of all promoters
Less than 50	22
51-75	23
76-100	22
101-150	14
151-200	6
Over 200	13

Respondents to the questionnaire were next asked about how much they charged for full-price admission to their shows. Table 4 summarises the responses. The typical price of admission was between £5 and £10 (51% of promoters). This price level applied most often to events with audiences of between 75 and 150. Only one in seven of the responding promoters (16%) put on events.

TABLE 4 Price of admission to jazz promoters' events in the past 12 months (2004-2005) (% of promoters)

Admission charge	**% of promoters**
No charge	16
£5 or less	12
£5.01-7.50	25
£7.51-10.00	26
£10.01-15.00	15
£15.01+	6

This overall profile is reflected in the analysis of the gigs included in the Jazz Services Touring Scheme in 2003-4 and 2004-5. Table 5 shows that average audience size for these tours by British jazz groups was 70 in 2003-4 and 78 in 2004-5. The Table shows the average price of admission to the tour gigs to be slightly less than £5. However, a number of the performances were to non-paying audiences (notably those at the South Bank complex in London). Taking this into account, the average ticket prices for these tours were at the £5 level.

TABLE 5 JSL Touring Scheme Performances 2003-2005

	2003-4	**2004-5**
Number of performances	439	519
Average audience size	70	78
Average ticket price	£4.87	£4.93
Average band fee	£363	£420

Source: Jazz Services Ltd

TABLE 6 Types of venues used by jazz promoters 2004-2005 (% of all promoters)

Venue	**% of promoters**
Pubs	26
Arts centres/ concert halls	17
Jazz clubs	15
Theatres	12
Restaurants	10
Other	20

Respondents to the questionnaire were asked to state at which type of venue they promoted jazz events. Table 6 shows that the most frequently used venues were pubs, but that a considerable number of promoters also presented jazz at clubs, art centres and elsewhere. The 'Other' category of venues used by jazz promoters includes ballrooms, hotels, holiday centres, libraries, community centres, churches, museums, hospitals and grottoes.

TABLE 7 Types of venues used by promoters and annual numbers of jazz gigs 2004-2005 (% of each venue type)

venue type	**1-10 gigs per year (%)**	**11-20 gigs per year (%)**	**21-30 gigs per year (%)**	**31-40 gigs per year (%)**	**41-50 gigs per year (%)**	**50+ gigs per year (%)**
Pub	24	10	17	5	7	37
Restaurant	27	27	7	0	13	27
Theatre	56	6	11	6	6	17
Arts centre/ concert hall	50	35	4	8	0	4
Jazz club	25	8	0	8	17	42
Other	47	23	17	0	3	10

The types of venues which held more than 50 gigs per year (i.e. weekly or more frequently) were mainly pubs and dedicated jazz clubs. Those that held the least number of jazz events a year (i.e. ten or less) were theatres and arts centres, but also many pubs.

The next Table shows the typical size of audience for each type of venue, split in percentage terms.

TABLE 8 Types of venue and audience sizes 2004-2005 (% of each venue type)

Venue type	**under 50 audience size (%)**	**51-75 audience size (%)**	**76-100 audience size (%)**	**101-150 audience size (%)**	**151-200 audience size (%)**	**200+ audience size (%)**
Pub	35	15	28	10	5	7
Restaurant	33	40	7	7	0	13
Theatre	17	6	22	33	6	17
Arts centre / concert hall	15	35	8	19	12	11
Jazz club	22	35	30	9	4	0
Other	6	16	29	10	7	32

Two-thirds of pubs and 80% of restaurants and hotels had jazz audiences averaging less than 100, as did half of arts centres and over 80% of clubs. The largest average audiences were found in theatres and concert halls. Over half of theatres where jazz was promoted attracted audiences of more than 100. Those venues also tended to charge the highest average ticket prices, as Table 9 shows.

TABLE 9 Types of venue and average admission charge 2004-2005 (percentage of each venue type)

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

Most theatres charged more than £7.50 as did 43% of restaurants and cafes. While 35% of pubs and 25% of restaurants did not charge for admission, the typical range of ticket prices across all types of venue was between £5 and £10. Clubs charged between £5 and £7.50 in 38% of cases, while a slightly smaller number charged between £7.51 and £10 for admission.

Based on the data from the promoters' questionnaire plus the evidence of musicians' earnings from live music, we have estimated the annual value of admission charges plus musicians' fees for free entry events to be £24 million. Of this, £1.5 million is attributed to fees for free entry events and £4.5m is estimated as ticket sales for jazz festivals. The remaining £18 million comprises ticket sales for 'one off' jazz performances.

"I think the state of jazz in Britain is looking up. There seems to be an abundance of places, who are at least willing to try jazz nights, jazz sessions, etc although too many of them don't have a full music/entertainment licence. I believe the increasing number of jazz/pop success stories (i.e., Jamie Cullum, then Gwyneth Herbert) is a great thing for Jazz. In all its forms."
Full-time drummer, London

1.2 Size And Structure Of The Live Jazz Sector

The structure of the many venues for jazz in the UK can be understood as a pyramid with the base formed by a very large number of 'residencies' where the same band plays regularly. These venues are mainly pubs or restaurants and a large proportion do not charge for entry. Based on an analysis of published lists of gigs and venues (mainly in *Jazz Guide* and *Jazz UK* magazines and the *Jazz In London* brochure) we estimate there is a minimum of 550 residencies in the UK. However, the total may well be higher as this are the type of venue least likely to automatically advertise or seek listings in jazz publications.

The next layer of the pyramid is that of jazz clubs and venues that book different artists on a regular basis (e.g. daily, weekly, twice-weekly, fortnightly or monthly). There are 350-plus of these, ranging from the London clubs or venues that present jazz every night of the year (for example, Ronnie Scott's, 606 Club, Pizza Express) to monthly clubs run by volunteer enthusiasts in, for example, Swindon or Kingsbridge, Devon.

Finally, there is a much smaller number of arts centres, theatres and concert halls that include jazz performances within a broader offer of music, dance, drama etc. We estimate that there are about 100 of these in the UK. Some of the larger venues with1000-1700 seats, including de Montfort Hall in Leicester and the Brighton Dome, have formed Music Beyond The Mainstream, a network of venues that has supported tours by such acts as the Necks and Matthew Herbert.

Taking into account the numbers of venues for jazz and the frequency with which they present performances, we estimate that the annual number of jazz gigs in the UK is at least 45,000.

1.3 Subsidy and Sponsorship

The questionnaire sent to promoters asked about any financial support they received apart from ticket sales. Table 10 shows that 41% of all promoters had received some sort of financial support in the previous 12 months. Or, to put it the opposite way, it was significant that almost 60% of jazz promoters receive no sponsorship or public subsidy.

TABLE 10 Jazz promoters: numbers receiving public subsidy and/or private sponsorship 2004-2005 (percentage of supported promoters at each type of venue)

Venue type	% of promoters with financial support
Any venue	41
Pubs	35
Restaurants	31
Theatres	72
Arts centres	50
Jazz clubs	26
Other	39

The types of venues and gigs least likely to attract financial support were pubs, restaurants and jazz clubs. Only 35% of pub gig promoters, 26% of club promoters and 31% of promoters of gigs in restaurants received any sort of sponsorship or subsidy. In contrast, jazz events at half of arts centres and over 70% of theatres were subsidised.

Table 11 looks more closely at the amount of financial support received by promoters at the various types of venue.

TABLE 11 Jazz promoters: amounts of subsidy received in previous 12 months 2004-2005 (percentage of promoters at each type of venue)

venue type	None (%)	under £500 (%)	£501-2000 (%)	£2001-4000 (%)	£4001-7000 (%)	over £7000 (%)
Pub	65	2	5	5	8	15
Restaurant	69	0	6	13	0	12
Theatre	28	6	28	11	6	22
Arts Centre	50	4	0	12	11	23
Jazz club	74	4	13	0	4	4
Other	61	6	13	7	3	10

Just over half of all promoters receiving subsidy got less than £7000 per year, with a quarter getting less than £2000. The Table also shows that most jazz clubs had less than £2000 in financial support while most promoters at arts centres and theatres received an annual amount of more than £4000.

The next table (Table 12) shows the relationship between the amount of financial support and the average audience size for jazz performances.

TABLE 12 Audience size and subsidy and sponsorship in last 12 months (2004-2005) (percentage of jazz promoters in each category of audience size)

audience size	**None (%)**	**Under £500 (%)**	**£501-2000 (%)**	**£2001-4000 (%)**	**£4001-7000 (%)**	**over £7000 (%)**
under 50	70	9	6	0	9	6
51-75	69	6	9	11	0	6
76-100	59	0	12	12	6	11
101-150	43	5	14	5	9	24
151-200	56	0	0	0	11	33
over 200	43	0	14	10	5	28

The figures show that subsidies tend to go to events with larger audiences. Only one-third of promoters with events attracting less than 100 listeners received subsidy while the number rose to almost half for promoters whose events had average audiences of over 100. A similar contrast is evident in the amount of financial support received by promoters. While only 11% of promoters of events with average audiences of between 76 and 100 attracted support of over £7000, this figure doubled to 24% for those with audiences of up to 150 and went up to 33% when the audience size was in the 151 to 200 range.

Table 13 shows the range of sources of external funding for jazz promoters.

TABLE 13 Jazz promoters: sources of financial support in last 12 months 2004-2005 (percentage of all promoters receiving funding)

Source of financial support	**% of promoters receiving funding**
Local authority	61
Arts council	71
PRS Foundation	29
Commercial sponsor	20
Other source	10

The main source of financial support took the form of public sector grants and subsidies. Arts councils gave funding to 71% of promoters in receipt of any kind of funding (which is only 25% of all jazz promoters) and local authorities gave grants to 61%. The PRS Foundation, a charitable trust, gave money to 29% of these promoters. Only 20% of jazz event promoters stated they received commercial sponsorship. A number of promoters received funding from more than one of these sources; hence the numbers in the Table add up to more than 100%.

"I believe jazz is an art form, which should not be reliant purely on its commercial potential and public arts subsidy should be used to increase the number of performance opportunities."
Part-time tenor sax player, North East England

As the figures in Table 13 suggest, the most important source of funding for jazz in the United Kingdom are the four national arts councils and the arts council regional offices in England. Much of the revenue funding derived from the Grants for the Arts programme.

A survey of the main jazz festivals undertaken for this report indicates that almost all receive some level of subsidy from an arts council. In addition, arts councils in some cases provide funds to jazz development or promotion bodies or to jazz clubs. For instance, Birmingham Jazz received over £20,000 from Arts Council England, West Midlands in 2005 while Cardiff Jazz Society was given £2000 by the Arts Council of Wales. In Scotland, Assembly Direct received over £206,000 from the Scottish Arts Council.

At the national level in England, Jazz Services Ltd and the festival and tour promoter Serious both received considerable amounts from Arts Council England. In the case of Jazz Services this was divided between funding to sustain the organisation and its activities and the Touring Support Scheme. Serious received over £100,000 towards its programme of concert and tour promotions, many of which involve jazz musicians. The Contemporary Music Network is another national client of Arts Council England that includes jazz among the tours it organises. In 2005, for example, it supported tours by Henry Texier and the F-ire Collective.

In Scotland, the Scottish Arts Council helps to fund the Scottish Youth Jazz Orchestra and the Scottish National Jazz Orchestra. The Arts Council of Wales supports the Brecon Jazz Festival (as does the Welsh Assembly government), the Women's Jazz Archive and other organisations.

In some cases, the arts councils provide direct support for specific projects or smaller companies. The London Musicians' Collective received £125,000 from Arts Council England in 2005. The event promotion and record companies Dune and Basho each received over £25,000 in 2005 while a similar amount was given to the Kenny Wheeler tour in that year.

Arts Council England does not publish details of grants of less than £25,000, which makes robust estimates of spending on jazz difficult to calculate. It is also the case that grants to venues or to combined arts festivals may be of partial or indirect benefit to jazz, when jazz concerts are a component of arts centre or festival programmes. However, we cautiously estimate that total annual spending by the arts council sector in 2004/5 on jazz was in the region of £3.3 million.

This figure should be understood in the context of the arts councils' total spending on music. The published accounts of the Arts Council of Wales show that jazz received about £200,000 in 2004, equivalent to 5% of the £4 million-plus given to Welsh National Opera alone. The subsidies given in other countries of the UK were similarly disproportionate.

In three English regions, the Arts Council and, in some cases, local authorities, channel funding for jazz through a specialist organisation which then provides support for promoters, musicians and audience development. These are JazzAction (North East England), NWJazzworks (North West England) and Jazz Yorkshire. Apart from this, support for jazz by local councils is concentrated in the festival sector than the gig sector. This may be due to the general awareness among local politicians and officials of the general benefits festivals can bring to the local economy, a factor highlighted in a growing number of studies of festivals of all types (for example Association of Festival Organisers 2004, Hadley et al 2006 and Long and Owen 2006). The amounts given to festival promoters vary considerably and often involve gifts ‘in kind’ rather than (or in addition to) direct payments. We estimate the annual amount of direct support for jazz from the local authority sector to be in the region of £600,000.

Beyond the public sector, the last few years has seen an increase in the number of charities devoted to support for the arts and in funding for jazz in this context. Among these are the PRS Foundation (PRSF), the Jerwood Charity, The Musicians Benevolent Fund (MBF) and the Esmee Fairbairn Foundation. We estimate the annual value of such support for jazz projects and artists to be approximately £250,000.

PRSF was launched in 2001 as the charitable arm of the Performing Right Society and has a budget of over £1 million per year to spend in support of the creation and performance of new music. It has a specific scheme of grants for small-scale jazz promoters, administered by Jazz Services Ltd, which has assisted 12% of the promoters who replied to our own questionnaire. The PRSF has made awards to a number of jazz projects through its Performance Groups scheme.

Another important source of funding is the Jerwood Charity that, with PRSF, supported the Take Five project in 2005. This scheme was administered by Serious and provided time and expertise for a small number of established jazz musicians to consolidate their career development. The scheme was repeated in 2006. Elsewhere, the Cheltenham Jazz Festival has since 2003 included a section for ‘rising stars’ supported financially by the Jerwood Charity. An average of nine soloists and bands have benefited each year.

The Musicians Benevolent Fund (MBF) has a Peter Whittingham Award for Jazz worth £4000 and given annually to an individual or group to develop and promote its work. The 2004 award was made to 6pac. In 2004 the MBF also gave a £3000 Music Education Award to Gwilym Simcock to finance the recording of a CD of his own compositions.

The Esmee Fairbairn Foundation made grants to Basho Music Ltd (£8000) and Grand Union Orchestra (£32,000) in 2004. It also supported the Kenny Wheeler tour.

1.4 Festivals

More than one third of the jazz promoters responding to the questionnaire (38%) had organised a festival of some kind in the previous 12 months. These vary greatly in size but as Table 13 shows over half the festival promoters in the survey put on a festival attended by over 1000 people and 44% organised an event for audiences of over 2000.

TABLE 14 Jazz festivals by audience size 2004-2005 (percentage of jazz festival promoters)

festival audience size	**% of festival promoters**
Under 200	15
201-400	9
401-750	9
751-1000	5
1001-2000	18
Over 2000	44

These results and other sources suggest that more than 200 jazz festival events are now held annually in the United Kingdom. In each of 2004 and 2005 more than 60 medium and large-sized jazz festivals advertised their events in national media (see list in Appendix 1). In addition jazz concerts are included in at least a further 40 music festivals or general arts festivals.

Responses to the questionnaire showed that festivals were much more likely to get subsidy or sponsorship than regular gig promotions. As shown in Table 15, more than two-thirds of festivals (68%) attracted outside funding compared with less than half (41%) of club, pub and theatre etc events.

TABLE 15 Jazz Festival promoters: sources of financial support in last 12 months 2004-2005 (percentage of all festival promoters receiving funding)

Source of funding for festival	**% of promoters**
Local authority	48
Arts council	37
PRS Foundation	18
Commercial sponsor	39
Other source	23
none	32

Most significantly, 39% of festival promoters had commercial sponsorship compared with only 8% of gig promoters. Almost half of jazz festivals (48%) had some local authority subsidy, with 37% receiving money from an arts council and 18% from the PRS Foundation.

TABLE 16 Jazz Festival funding by amount 2004-2005 (percentage of festival promoters receiving funding)

Amount of funding for festivals	% of promoters
Under £2000	19
£2001-4000	7
£4001-7000	12
£7001-10,000	17
Over £10,000	45

Table 16 indicates that the range in the amount of funding received for festivals parallels the size of the event. Almost half of festivals receiving funding (45%) had over £10,000 from outside sources. The promoters' questionnaire did not ask for a detailed financial breakdown of payments by public and private sponsors. However, our research into specific events suggested that, despite the arrival of some high profile financial industry sponsors, the bulk of support, especially for smaller events, seems to come from public or charitable sources.

The highest subsidy payments made in 2004-2005 were in excess of £100,000, from Arts Council England to the London International Jazz Festival, from the Scottish Arts Council to the Glasgow International Jazz Festival (£196,500) and from the Arts Council of Wales to the Brecon Jazz Festival. Other subsidies included £32,000 for the Lichfield Real Ale, Jazz and Blues Festival from Arts Council England, West Midlands, £26,000 to the Manchester Festival from Arts Council England, North West and £42,934 to the Aberdeen International Jazz Festival and £1,120 to the Ayr Jazz Festival from the Scottish Arts Council.

Local authorities seem to be providing financial and sometimes logistical support for an increasing number of festivals, probably because of the growing emphasis on the economic importance of the 'creative industries'. A case study of the 2004 Hull Jazz Festival (in Long and Owen 2006) shows that the city authority provided funding of £15,000 (25% of the festival turnover) as well as administrative services. This study also calculated that the 'multiplier' effect on the local economy of spending by festival-goers was 1.7 times the actual amount spent.

1.5 Business and Private Sponsorship

The number of business sponsors of jazz festivals has increased in recent years. In this process, two points are worth noting. Firstly, the growth in the number of festivals for which sponsors pay to have their name in the title: such 'naming rights' were bought by the HSBC bank for the Coventry and Brecon events in 2006 and by Starbucks at the Manchester festival in 2005. Secondly, the relatively recent arrival of the type of sponsor more readily associated with classical music events (financial services, hotels) to join those sponsors frequently associated with popular music festivals, principally the alcoholic drinks brands.

Among financial services companies, the Royal Bank of Scotland supports the Glasgow International Jazz Festival while Northern Rock is a sponsor of the Appleby Jazz Festival. Hotel groups involved with jazz include Ibis (Northamptonshire International Festival), Malmaison (Jazz on the Quay) and City Inn (London International Festival). Other sponsors include travel companies (Manchester Airport for the Wigan Jazz Festival and P&O Ferries for the Holywood Festival), the coffeeshop chain Starbucks (Manchester Jazz Festival and the carmaker (Peugeot (the Coventry Festival). Despite these changes, alcoholic drinks companies remain active in jazz sponsorship at the Ealing (Greene King), Islay (Black Bottle) and Scarborough (Grolsch) events.

Many festivals also have media sponsors or partners such as a local newspaper, a BBC radio network or a specialist jazz publication such as *Jazzwise*. Much of this sponsorship is provided ‘in kind’ rather than through financial support. Publications may provide advertising space free of charge to a promoter and broadcasters help to promote the event by relaying concerts or recording them for broadcast at a future date. We believe that this type of ‘non-financial’ support is of considerable importance but we have not been able to provide an estimate of its monetary value to festival promoters.

Sponsorship is also vital to some of the UK jazz awards events though the sponsors are often public corporations (e.g. the BBC) or music industry bodies (e.g. Phonographic Performance Ltd). However, Britain has yet to emulate the most valuable European award for jazz musicians, the Jazzpar Prize, financed by the Scandinavian Tobacco company of Denmark. The prize is worth about £20,000. Previous winners have included Tony Coe (1995) and Django Bates (1997).

According to the specialist agency Arts & Business, ‘business investment in the arts’ in the UK was worth almost £115 million in 2002-3. Of this £14.5 was received by music organisations (excluding opera companies and venues which received £5.5 million). The ten organisations receiving most investment included eight classical orchestras, one classical music trust and one conservatoire (Royal Academy of Music).

Almost no details are available from our own questionnaire results or from publicly available sources about the amounts of business sponsorship money given to individual jazz festivals but we conservatively estimate the annual figure to have been £600,000 in 2004-5 or about 4% of the £14.5 million figure.

Adding this to the amounts already mentioned for arts council, local authority and charitable trust funding gives a total for jazz funding of £4.75 million. These figures are summarised in Table 17

TABLE 17 Funding Sources for Live Jazz Events 2004-2005 (£ million)

Funding source	**£ million**
UK arts councils	3.30
UK local authorities	0.60
Charitable bodies	0.25
Commercial sponsors	0.60
TOTAL	4.75

2. Composition and music publishing

The results of the musicians' questionnaire showed that 40% of UK jazz musicians are composers as well as performers. However, because of the small sales of CDs of new jazz and its lack of airplay, British jazz musicians earn relatively little from their original compositions.

In other areas of music many composers are represented by music publishing companies that take a percentage fee for administering and exploiting musical works. However, many jazz composers are 'self-published' or represented by a music publishing subsidiary of their record company.

A recent initiative in this sector is In All Seriousness Music, a joint venture music publishing company between Serious and the pop music company Big Life. It represents UK composer-performers (including five jazz musicians) in seeking commissions as well as the more conventional publishing aspects such as exploitation of musical works internationally.

The main sources of earnings from composing are sales of recordings, live performances and other public uses of music (background music, jukeboxes etc), broadcasting and media commissions (film, television and advertising music).
Fees for public performance and broadcasting in the UK are collected by the Performing Right Society (PRS). In 2005 these totalled over £214 million. PRS also received a further £100 million from overseas for the use of British music in broadcasts, concerts and other sources worldwide.

Because PRS does not analyse its collections or distributions by musical style, there are no official figures for income earned by jazz composers. However, based on analysis of radio and television airplay we estimate that fees paid to PRS for broadcasts of live and recorded jazz were in the region of £0.6 million in 2005 and based on PRS income from popular music concerts, pubs and other sectors we estimate that non-broadcast fees relating to jazz compositions to be slightly higher at £0.7million. In addition, there was a further payment from record companies to the Mechanical Copyright Protection Society (MCPS), the sister organisation of PRS, of 'mechanical royalties' in respect of the sale of CDs of jazz music, estimated at £2.2 million.

Payments to composers of scores for film, television or commercials, are negotiated on an individual basis and the year-on-year use of jazz-style themes by television and film producers and agencies is unpredictable. We have therefore included a nominal amount of £200,000 for this use of jazz compositions.

There is a thriving business in educational music books (tutor books) and recordings. There are distinct markets of individual amateur players (Jazz Services Ltd's past research has shown that about half of the jazz audience also plays at some level) and of trade sales to educators and educational institutions. The materials supplied by the Associated Board of the Royal Schools of Music (ABRSM) and Trinity Guildhall in connection with their jazz qualifications make an important contribution here.

The Jazzwise organisation, which sells the Jamie Aebersold range of materials, estimates that the market for these products has grown by 200% in the past two decades. The company's online music store has helped to increase sales and 20% of its turnover comes from this source.

Sheet music sales and hire constitutes a final category of payments to jazz composers. Although the market for printed books of music is now almost negligible, some composers receive fees when written-out parts for ensemble or orchestral compositions are hired out to performing groups. These are occasional rather than regular income sources, however, and we have estimated their annual value to be £50,000.

Table 18 summarises the turnover of this sector of the jazz economy.

TABLE 18: Composition and music publishing: annual fees for jazz composers and publishers 2004-5 (£ millions)

Source of publishing fees	**Amount in £ millions**
Mechanical royalties (MCPS)	2.2
Broadcasting (PRS)	0.6
Public Performance (PRS)	0.7
Media Commissions	0.2
Educational music products (retail)	1.2
Sheet music sales and hire	0.05
TOTAL	4.95

3. Recording and distribution of sound and video recordings
The research looked at both ‘macro’ and ‘micro’ data on the recorded jazz market in the UK. The macro dimension concerns the place of jazz within the total sales of recorded music while the micro element stems from the position of small labels and individuals recording and distributing new work by UK musicians.

Macro sales of recorded music are measured by the BPI, trade organisation of the UK record companies. BPI figures regularly show ‘jazz’ as comprising around 2% of all CD sales. For 2004, this would translate into retail spending of about £38.6 million. This includes sales of internationally-known acts from North America and the UK plus reissued CDs by some British musicians but mainly by American and other foreign artists, which have been issued in large numbers by major record companies (e.g. Universal, Sony BMG, EMI and Warner) in recent years and sometimes heavily marketed by those companies. Such sales account for over 90% of spending on recorded jazz in the UK.

Those major record companies and the main ‘independent’ record companies issue very few new recordings by British jazz musicians. Whereas a decade ago such instrumentalists as Guy Barker, Julian Joseph, Tommy Smith, Andy Sheppard, Courtney Pine and Orphy Robinson had contracts with major labels, but the major companies have now abandoned this layer of musicians. The few with contracts now are vocalists or singer/pianists such as Jamie Cullum and Clare Teal who are seen by the companies as having ‘crossover’ potential.

Despite this neglect, there is a thriving recording scene in the UK jazz community. Each year about 1,000 jazz CDs are released onto the UK market. The majority of these are the reissues from the major companies but there are between 200 and 300 CDs of new music by British jazz musicians. The amount of recording activity can be gauged from the fact that 23% of jazz musicians responding to our questionnaire said they had participated in ‘commercial sound recording’ in 2004. About half of the CDs are self-produced by jazz groups or soloists, mainly for mailing to promoters and for sale at gigs. The remainder are issued by about 30 specialist jazz labels run by musicians, industry professionals such as managers or by enthusiasts.

Bands can sell between about 15 and 50 copies of their CDs to audience members at a gig or an average of between 200 and 300 a year. Such CDs can have an ‘active life’ of three years if the band tours frequently. Many of these new UK jazz CDs are also distributed to record shops by specialist companies such as New Note, Proper or Harmonia Mundi but they are increasingly sold from internet sites such as Jazz On CD or Crazy Jazz. Some label owners believe that Amazon is a valuable source of sales since it offers such a vast range of repertoire, supporting the ‘long tail’ of cultural products, including jazz CDs. The download market is growing, although some label owners believe that the lesser audio quality of MP3 compared to CD is off-putting to some jazz fans. At least one label is using the MySpace website as a way of marketing its releases to an international audience.

Typical sales for these albums in the UK range from a few hundred to several thousand and they are increasing. To illustrate the different positions of large and small companies, the researchers were told of one jazz instrumental group signed by a major company whose debut album sold 1,500 copies. This would be regarded as a satisfactory figure by many small labels but the major company has since dropped the group from its roster. Anything more than a couple of thousand sales makes a CD a ‘hit’ and in 2005 one album by a new British band released by a small specialist label sold 10,000 units. Taking into account that exceptional success, we estimate that annual sales of new UK jazz CDs are about 50,000 units with a retail value of approximately £500,000.

Recording artists may also receive payments when their recordings are broadcast or played in clubs, pubs or other public places. The royalties for these uses of sound recordings are collected by Phonographic Performance Ltd (PPL) whose turnover was £86.5 million in 2005. In the past, many musicians were represented in this sphere by the Performing Artists' Media Rights Association (PAMRA), a body that has now merged with PPL. As with PRS, PPL is unable to specify how much of this amount was collected in respect of the broadcasting and other uses of jazz recordings. Because of the very small amount of jazz programming in the British media, we estimate the amount of PPL royalties payable to jazz musicians to be less than 1% of the PPL total or £400,000. This brings the estimated total turnover of the jazz recording business in 2004-5 to £39.5 million.

4. Media: broadcasting and print.

Jazz coverage in the media ranges from the small number of specialist magazines available at newsagents or at gigs and the equally limited availability of jazz on radio and television to reviews and articles in the national press. There is also a significant jazz presence on the Internet.

For the purposes of this research, the UK national newspapers and national radio and television networks were monitored over two monthly periods (November 2004 and June 2005).

Of the articles featuring jazz in the press, 82% were published in the ‘broadsheet’ newspapers. During November 2004 (London Jazz Festival month), these averaged about 20 a week (including Sunday papers). Of these, the greatest number of items was in *The Times* and *The Independent*. Compared with the broadcast coverage of jazz (see below), a high proportion of these featured British artists and events. The tabloid newspapers contributed 18% of jazz-related articles but these were typified by a *Daily Star* item headlined ‘Jamie Cullum gets bombarded by knickers on US tour’.

The only national radio programmes featuring jazz were on BBC Radio 3 and BBC Radio 2. Of these, over 80% were on Radio 3. The only regular jazz programme on Radio 2 was the Humphrey Lyttelton *Best of Jazz* weekly show.

The research did not monitor local or regional radio stations but it is worth noting that in 2005 the former Jazz FM stations in London and North West England changed their names to Smooth FM, thus completing the transformation of the country’s first station licensed as a jazz broadcaster.

In the monitoring period, the cable and satellite pay-TV Performance Channel programmed a number of filmed concert shows (seven in one week), but all of these featured well-known US and Latin artists such as Miles Davis and Omar Sosa. There were ‘one-off’ shows on both Channel 4 and BBC 2. Channel 4 also ran *It’s A Jazz Thing,* a series compered by Branford Marsalis.

Because the main television channels’ commitment to jazz is sporadic, such sampling is not necessarily reflective of a whole year’s programming. In particular, the BBC’s acclaimed series *Jazz Britannica* did not fall within our sampling period.

“Good that BBC4 are showing a few jazz gigs - the amount shown on terrestrial channels is ludicrously small. Why have there been no updates to Jazz 625 in decades? After all, it's cheap TV. Stop press: The Performance Channel until recently showed jazz gigs around midnight every night. Now, it's been replaced with soft porn.”
Full-time pianist, Eastern England

The specialist jazz press in the UK consists of several periodicals available through subscription, at newsagents or at venues. The monthly *Jazzwise* magazine has 1,600 subscribers and total sales per issue of about 6,000. *Jazz Journal International* is estimated to sell 8,000 copies per issue while *Jazz Review* has a 4,000 circulation. *Jazz UK*, published by Jazz Newspapers Ltd, a wholly-owned subsidiary of Jazz Services Ltd, has about 2,000 subscribers but 30,000 copies are also available free of charge at venue and educational institutions. *Jazz Guide* is a free listings magazine for the traditional jazz scene with a circulation of 12,000. There are a number of other useful publications such as

Jazz Rag and *Just Jazz*, while on the borders of jazz and other contemporary musics, *The Wire* and *Straight No Chaser* each claims to sell about 30,000 copies per issue.

Jazzwise, BBC Radio 3 and RFH education held a Write Stuff jazz writing project at the London Jazz Festival in 2003, 2004 and 2005. The initiative gave up to eight jazz enthusiasts the chance to work with professional journalists, and to write reviews that were published in *Jazzwise*.

5. The Audience for Jazz

A number of national and regional surveys have been made of audiences for the arts. The results of most of these include information on jazz audiences. This section summarises the relevant findings of this recent research.

5.1 Audience Research

In recent years the national arts councils of England and Wales have commissioned the principal national surveys. Arts Council England has commissioned market research from the TGI company every two years. Table 19 shows some of the results of the TGI surveys.

TABLE 19 England 2001-5: percentage of adults attending music events in the last 12 months

type of music event attended	**2001 % of adults**	**2003 % of adults**	**2005 % of adults**	**2005 *Taking Part % of adults**
Any live music event	36	39	n/a	n/a
Rock or pop	18	20	n/a	n/a
Classical	10	10	13.6	8
Opera or operetta	6	6	7.7	4
Jazz concert	5	6	7.5	6
Folk or C&W	3	2	n/a	n/a
World music	n/a	2	n/a	n/a
Other music	9	7	n/a	24

*source: TGI/Arts Council of England, *DCMS n/a : not available*

In 2003, the TGI survey found that 6% of adults questioned had attended a jazz performance in the past 12 months and 14% had heard jazz on radio in the previous month. The jazz audience was smaller than that for classical music (10%), the same size as that for opera and greater than the folk or world music audience. However, the jazz audience had increased from the 5% level of the 2001 survey.

The 2005 TGI survey showed an increase to 7.5% in the percentage of adults attending jazz performances. TGI says this equates to 3.1 million people. However, the question asked in 2005 was changed to enquire in a less precise way ‘whether you attend any of these artforms these days’.

In 2005 the Department for Culture, Media and Sport initiated *Taking Part*, a new survey of culture, leisure and sport in England with support from Arts Council England and other cultural agencies. The first report on the results of Taking Part showed that 6% of adults had attended a jazz event in the previous 12 months, corroborating the TGI finding for 2003. The *Taking Part* results show that the jazz audience is greater than that for opera (4%) but smaller than that for classical music (8%). It is notable that *Taking Part* found classical audiences to be smaller than did the comparable TGI surveys for 2001 and 2003.

TABLE 20 England: 2003 Number of attendances at jazz events (% of jazz audience members)

Once (%)	Twice (%)	3-5 (%)	6-10 (%)	11 or more (%)
54	20	16	6	4

Source: Arts Council England

The TGI survey in 2003 also asked jazz audience members how many events they had attended in the previous year. The table shows that almost three-quarters went to only one or two performances. If we disregard those numbers and take the frequently attending or 'core' jazz audience to be those who attended at least three jazz events (26% of the total jazz audience), this is equal to about 1.6% of the adult population of England, or about 500,000 individuals. On the same basis, the TGI figures give a core audience for classical music of about 400,000 and the core audience for folk of 100,000 and for world music of about 26,000. An example of the distinction between a 'core audience' and the broader occasional audience came from a UK promoter who told us that the core audience for a London concert by the US musician Branford Marsalis is 500 but the numbers attending are much larger because others come to hear 'excellent music' – jazz is one of several genres or art-forms important to them.

More recent research from Wales shows slightly different results. As Table 21 shows, in Wales, the proportion of the adult population attending jazz events was higher at 10%, although this was less than the numbers for folk and world music combined.

TABLE 21 Wales 2005: Attendance at one or more music events in the previous 12 months (percentage of all adults)

type of music event	% of all adults
Any Music event	23
Classical	13
Folk and world music	11
Jazz	10
opera	7

Source: Arts Council of Wales

But although the categories for measuring the frequency of attendance were different, there was proportionally a similar 'core' audience to that in England: Table 22 shows that half of the Welsh jazz audience attended more than one event a year as did 46% of the comparable English audience.

TABLE 22 Wales: Number of music events attended in 2005 (% of audience members for each genre)

type of music event	% of audience attending one event	% of audience attending 'a few' events	% of audience attending 12 or more events
Any music event	46	49	5
Classical	39	53	8
Folk and world music	43	48	9
Jazz	50	37	11
opera	55	39	6

source: Arts Council of Wales

The Welsh research also studied the demographic basis of the audience for each type of music. It found a relative bias in the jazz audience towards males (57% of the audience) and a socio-economic bias of 'strong ABC1'. These results also showed that the jazz audience was also slightly younger than the overall Welsh population. The next Table indicates, for example, that 18% of those attending one or more jazz events were under 24 compared with 15% in the total population and that 11% of over 65s went to a jazz concert when this age group represented 20% of the total population.

TABLE 23 Wales 2005: Jazz audience and general population by age group (percentage)

Age group	as % of Jazz audience	as % of general population
16-24	18	15
25-34	14	15
35-44	23	18
45-54	18	17
55-64	16	16
65+	11	20

source: Arts Council of Wales

TABLE 24 England: type of music sung, played or performed, by gender, 2003. (percentage of adults participating in music)

type of music	men (%)	women (%)	all(%)
Classical	21	41	31
Choral	11	19	15
Jazz	12	8	10
Rock or pop	50	31	40
World music	6	7	7
Other	31	26	29

Source: Arts Council of England

Table 24 surveys the participation in music of adults in England. It shows that 12% of men and 8% of women had stated they had played or sung jazz in the past 12 months. The totals in each column add up to more than 100 because some respondents played or sang more than one type of music.

5.2 Audience Development

“Jazz clubs whether modern or traditional, seemed to be configured to 50 plus age range in this country. I feel this is an unhealthy state of affairs. Mentioning jazz puts off many of my clients and consequently, I do not refer to it when discussing gigs such as weddings or parties.“
Full-time trumpeter, North East England

Various audience development initiatives have been taken in our survey period, in an attempt to expand the jazz audience. We give just two examples here.

The Cleethorpes Beachcomber Jazz Weekend collaborated in 2005 with Music4U (the Humber Region Youth Music Action Zone) on a series of schools workshops and a special performance for school children at the festival plus a concert featuring young musicians from the local area.

In London, the EDF New Audiences scheme has provided subsidised tickets for events at the London International Jazz Festival and elsewhere to members of groups or communities under-represented in the audience for jazz. The scheme won a Financial Times/Arts &Business award in 2005.

6. Jazz Education

"In my experience most kids get a chance to play an instrument only if the parents will pay. And therefore many of them are missing the opportunity to play at all. We need to offer music and jazz to all children."
Full-time bass guitarist, London

TABLE 25 Jazz musicians' educational work in 2004-2005 (% of all types mentioned by musicians as working as teachers)

type of educational work	% of musicians in each type of work	% with most teaching income from each type of work
Private tuition	43.0	30.0
schools	17.5	11.8
Peripatetic	14.3	10.5
Further education	10.0	5.4
Higher education	15.0	11.3
Outreach work	6.5	3.0
Examining	4.8	1.4
Other	10.0	6.4

The Table above shows that teaching is an important component of the work and income of jazz musicians. Over half (58%) did some form of teaching in 2004, with private tuition by far the most frequently mentioned (by 43% of musicians). This was followed by schools (18%), higher education (15%) peripatetic teaching (14%) and further education (10%). Private tuition, schools and higher education were also the areas of education that provided the greatest amount of earnings for musicians.

But jazz still occupies a relatively small place in music education and training as a whole in the UK, although this has been increasing.

Jazz education is diverse in type but unevenly spread across the UK. There is a broad and small range of provision – from young learners' opportunities up to university research degrees. However, the range of activities on offer is small compared with the mainstream of classical and popular music education, and has often been driven by the enthusiasm and interest of one individual. As a result, jazz education is a sphere of activity into which new practitioners may be able to move if they have sufficient desire and invention, especially in geographic areas of the UK not currently well served.

The main areas of jazz education are:

- Higher, further and continuing education;
- Private instrumental teaching and external music examinations
- Residential and short courses and community initiatives
- School music teaching (class room and peripatetic)

6.1 Higher, further and continuing education

There are jazz courses in some of the UK's most prestigious conservatoires, but very little jazz education elsewhere in the higher education sector.

The six British conservatoires with dedicated jazz studies departments are the Guildhall School of Music and Drama, the Royal Academy of Music and Trinity College of Music all in London; the University of Central England's Birmingham Conservatoire; Leeds College of Music; and the Royal Welsh College of Music & Drama. These conservatoires offer a range of undergraduate degrees and postgraduate qualifications (from post graduate certificates and diplomas up to MA degrees) which enable jazz performers and composers to gain a high level education from experts in the field.

In addition a number of universities offer a jazz degree – notably Middlesex University with its BA Hons Jazz and Napier University at post graduate level in its M Mus and PG Diploma. Of particular note is Brunel University in London in which jazz musicians have now been enabled quite recently to undertake advanced research to the level of M.Phil.

Geographically this set of jazz departments means there are only a few parts of the UK – London, the Midlands, Cardiff and Edinburgh – where jazz can be studied as a main higher education subject. This geographic limitation increased in the recent past when the University of Exeter closed its music department and its B Mus in Jazz.

Across the UK, we estimate there are 490 undergraduates studying a B Mus or BA hons in Jazz, with 40% of these at a conservatoire and the other 60% at a university or college. Those at conservatoires receiving premium funding from the Higher Education Funding Council (or equivalent) bring in the region of £13000 each per year into their institution; while those not currently receiving such funding attract £8000. These fees are inclusive of the £3000 per annum tuition fee being charged by all institutions with undergraduate Jazz degrees from Autumn 2006. This means the UK undergraduate jazz economy for jazz specialist degrees is £1,690,000 in the UK premium funded conservatoires and £2,880,000 in the UK universities and non premium funded conservatoires, with a total combined income of £4,570,000.

At postgraduate level there are a minimum of 70 full time equivalent students of jazz in the UK higher education sector with fees ranging from just over £3000 per annum for a research degree at Brunel to over £14000 for an overseas M Mus at the Royal Academy of Music. The geographic spread of postgraduate options is better than at undergraduate level with Napier University representing Scotland. The numbers at each institution are small- from a handful at some up to 20 at the largest. This produces a total fee income to UK institutions of £470,000.

Jazz also features as a small unit or module offering in at least 20 general music undergraduate degrees. Most of these offer one or two units or modules across a three year programme, representing up to 10% of the total study package. We estimate at least 400 undergraduates per academic year are taking one jazz module across these degrees, with an estimated value to the jazz economy of at least £400,000.

Furthermore, the jazz income of higher education institutions is increased by conference activity, mainly the Leeds International Jazz Education Conference, but not significantly by public research funds. It is also bolstered by income from activities of junior jazz departments such as at the Royal Academy of Music and by summer schools (dealt with elsewhere). This activity is valued at no more than £200,000 per annum.

The following Table summarises our estimate of the spending on jazz in higher education.

TABLE 26 Cost of jazz courses in UK higher education 2004-5 (£ million)

Type of jazz course	**Spending on each type of course: £ millions**
undergraduate courses	4.57
Postgraduate courses	0.47
Jazz modules in general degrees	0.40
Other activities	0.20
TOTAL	5.64

The majority of jazz lecturers working in higher education are employed as part time staff, either as fractional established academic lecturers or as visiting hourly paid staff. Using previous studies of employment in UK higher education music departments as a guide, we estimate there are around 110 part time teaching roles in higher education jazz and 12 full time equivalent (often occupied as part time fractional posts) lecturing jobs. All these are funded from the income to the courses as described above.

6.2 Further and Continuing Education

Specialist further and continuing education courses are rare in the UK. Jazz is implicit within the many popular and commercial music courses found everywhere in the UK, but there is only a handful of colleges providing a specialist jazz education at this level.

Chichester College provides three one year full time courses at A level equivalent for a total of around 60 students. This supports one full time, two fractional and five visiting tutors. The other further education courses that aim for a similar jazz specialism include the National Award in Jazz & Commercial Music at Liverpool Community College, also a one year programme for 20 students, and the HNC in jazz Studies at Wakefield College. The jazz FE sector as a whole is small and valued at a maximum of £400,000, supporting four full time equivalent posts and a maximum of 14 part time visiting tutor posts.

In London this paucity of jazz in the FE sector is contrasted with a lively Continuing Education scene. This is centred around a small number of education institutions – Morley College, City Lit Institute, Goldsmiths College (Professional and Community Education department, not the music department) and the Richmond Adult & Community College. These colleges draw on the capital's community of established working jazz performers as tutors to provide an array of style, skill and instrument based weekly evening or weekend courses, usually lasting a year. The courses range in scope from jazz workshops bands, vocal groups and rehearsal big bands to jazz ear training, jazz harmony or musicianship and to studies of jazz piano and other instruments. The Goldsmiths' suite of Certificate and Diplomas in Jazz and Popular Music Studies offer a practical opportunity to study jazz in-depth for people looking for more than a just once a week course.

Outside London, there is little that directly replicates the scope of what is on offer in the capital. There are a few small clusters of continuing education courses in individual colleges, but much more of the non-London based jazz education activity is in residential and short courses (see below).

We value Continuing Education classes in jazz at least at £420,000. This mainly supports a community of part time tutors and a very small number of programme co-ordinators working in two or three of the major colleges, some on fractional appointments.

6.3 Private instrumental teaching and external music examinations

As we have seen, private tuition is the most widespread form of teaching practised by jazz musicians with the results of the questionnaire suggesting that one quarter of musicians provide some tuition each year. we estimate that fees earned by jazz musicians for private instrumental teaching are about £600,000 per annum. In addition, a significant minority also work as examiners.

Jazz is a small part of the successful UK music graded examinations business, particularly with the examinations offered by the Associated Board of the Royal Schools of Music (ABRSM) and the longer established jazz examinations of the Guildhall Examinations Service, now part of Trinity Guildhall (TG). The business generates income principally from examination candidate fees and from associated book publishing.

Based on available figures for 2005, we value this business based on a maximum of 6,700 examinations in jazz per year (no figures were available from the ABRSM) with associated book sales, bringing a total income of £540,000. This supports a team of part time employed examiners, examination administrators, and employees involved in the book publishing business, principally through the ABRSM and Trinity Guildhall organisations.

6.4 Residential and Short Courses, and Community initiatives

Jazz education is thriving with entrepreneurial and community spirit in the residential and short course area. These range in size and scope from the Guildhall and Royal Academy of music’s summer jazz courses in London, attracting large numbers of students, with as many as 140 students and over 20 tutors per week, to the internationally oriented Jamey Aebersold jazz summer school held in Richmond. The international dimension has developed into jazz courses in exotic locations, particularly in France and in Cuba. We estimate there are at least 25 summer and residential schools per year of significant size which pay jazz tutors in the region of £150 per day to teach and charge for tuition around £300 per week (not including accommodation). Together these courses present a sector worth £650,000**.** This income is used to pay tutors, pay a small group of individuals who promote and/or administrate the courses, often on a part time basis, and finance the hire of venues for the courses.

There is an abundance of community based short courses throughout the UK. These are generally courses lasting a few days such as the Benslow Music Trust’s range of jazz event/courses such as their 2006 Dance Band Weekend or I Got Rhythm weekend. This is a constantly evolving area of activity , but we estimate its value, mainly paying for tutor costs and venue hire in equal measure, at £200,000

6.5 School Music Teaching (classroom and peripatetic)

The school music teaching sector is a huge economic area, but one in which jazz has only a small presence by comparison with the mainstream of classical music. This is highlighted by the small numbers of musicians with jazz degrees entering the school workforce as classroom music teachers. According to the University of Westminster "Valuing School Music" report in 2001 only 2.9% of secondary school classroom music teachers held a degree in jazz, pop or music technology, compared with 78.1% holding a classical music degree. Given that jazz makes up only one part of this 2.9%, we estimate there may be as few as 120 school classroom music teachers in the UK state secondary sector with jazz degrees. If they are earning an average teacher' salary of £28,707 (top of the main teachers' scale outside of London) this estimates the earnings of jazz based classroom music teachers at **£**3,444,840. (Footnote – this assumes 1 percent of UK school class room secondary music teachers have a jazz degree background, and there are 1.5 full time equivalent class music teachers per secondary school).

Jazz is also a feature of school music services' provision. This is documented in detail in the *Survey of local Authority Music Services 2005* by Hallam, Rogers and Creech. In this report the authors identify jazz groups and big bands as being a significant feature of the music services' work, with an average music service providing 2.6 ensembles in this field for an average of 53 pupils. Across the 115 music services reporting that they provide big bands and/or jazz ensembles, this suggests 6095 pupils are benefiting per annum from regular ensemble and big band tuition in English state schools. The average charge to schools from music services for a music tutor is £27.10 per hour. Assuming tutors running an ensemble may be paid as much as 3 hours for running each ensemble, and that each ensemble meets once per week, we estimate the value of jazz tutors' income from teaching these ensembles as £24,310.

Jazz education has also benefited from grant making bodies for special projects, particularly Youth Music. 9% of Youth Music's grants have been allocated to projects including jazz, employing musicians, providing new music leaders with upgraded skills, and developing young people's music making. Over the last 5 years this 9% has been worth £4,932,000, an average of just under £1 million per annum. We have estimated that 15% of this, or £150,000, is used for education and training in jazz.
The following Table summarises the total spending on jazz education and training in the UK, based on the estimates given in this chapter. It should be noted that of the total of slightly more than £12 million about £1.5 million came from private individuals (for individual instrumental tuition and summer school fees) and the remainder from public sources (mainly the Department of Education and Skills).

TABLE 27 Annual spending on jazz education and training 2004-2005 (£ million)

type of jazz education and training	**Spending on each type: £ millions**
Higher and further education	5.64
Further and continuing education	0.82
Private tuition and examinations	1.14
Residential and short courses	0.85
Schools and peripatetic teaching	3.47
Youth Music	0.15
TOTAL	12.07

7. Profile of the Musicians

As part of the research for this report, a detailed questionnaire sent to over 2000 musicians. The response rate was about 33%.

TABLE 28 Geographical location of UK jazz musicians (percentage of total)

Region	% of jazz musicians based in each region
London	33
South East England	20
South West England	12
Midlands	9
North East England	7
North West England	7
Eastern England	4
Scotland	3
Wales	2
Northern Ireland	1
Other	2

Of those who responded, more than half were located in London and South East England, as shown in Table 28. Musicians were also asked to describe their professional status. In addition, one third said their work was ‘all jazz’, 54% ‘mostly jazz’ and 13% ‘mostly non-jazz’. The highest proportion of ‘mostly jazz’ players were based in London and North-West England, a reflection of the wider range of available general work (theatres, broadcasts etc) in those regions.

In terms of their employment situation, 68% said they worked full-time and 28% part-time. The term full-time indicates that performing jazz is the sole or main source of work and income. A part-timer is a musician with a primary or significant source of income or employment outside music in addition to musical employment. A small minority of musicians indicated they were ‘non-professionals’ or amateur, which we interpret as meaning that their earnings from music were zero or negligible.

“It's very difficult to maintain an income from just live jazz performance. I've had to supplement my income with lots of teaching and function work. Also there just aren’t any good, dedicated jazz venues in the Southeast, Brighton is getting better, but it's an uphill struggle.”
Part-time alto sax player, South East England

In terms of musical style, Table 29 shows that the highest levels of full-time musicians were found in Latin/Caribbean, free jazz, modern and mainstream. The highest levels of part-time players were in traditional and big band jazz.

TABLE 29 UK jazz musicians: professional status by musical style. 2004 (percentage of musicians in each style)

musical style	**full-time % of each style**	**part-time % of each style**	**amateur % of each style**
All jazz musicians	68	28	4
Traditional	47	48	5
Mainstream	66	31	3
Big Band	57	38	5
Modern	78	19	3
Fusion	69	28	3
Latin Caribbean	93	7	0
Free	84	12	4

The information on income sources provided by responses to the questionnaire is aggregated in Table 30. Live performance represented almost half of musicians' income and was by far the largest income source followed by teaching and other educational work. In contrast, broadcasting, recording and earnings from composing together amounted to less than 10% of earnings.

TABLE 30 Sources of Musicians' Income (percentage of total)

Source of income	**% of jazz musicians' total income**
Live performance fees	49.1
Broadcasting fees	1.2
Recording and session fees	3.6
Composing and arranging fees	2.2
Teaching fees	20.7
Royalties	3.1
Other music employment	4.4
Non-music sources	15.7

The total amounts earned from music reported by respondents to the questionnaire showed that the majority of jazz musicians continued to be paid less than the national average wage of £22,248 in 2005. As Table 31 shows, only 21% received more than £20,000 in 2004 with over half (53%) earning under £10,000.

TABLE 31 Musicians’ annual earnings from music (percentage of earnings of all jazz musicians combined)

Annual earnings from music	% of all jazz musicians
Less than £5000	33.9
Between £5001 and £10,000	18.9
Between £10,001 and £15,000	15.0
Between £15,001 and £20,000	11.0
Between £20,001 and £25,000	6.1
Between £25,001 and £30,000	6.3
Between £30,001 and £35,000	3.3
More than £35,000	5.6

Musicians were asked to state their three main areas of live work and three main sources of live performance income. In Table 32, the results have been converted to percentages that show the relative importance of each area of work for all UK jazz musicians

TABLE 32 UK jazz musicians. Main sources of live performance work and income 2004-2005 (percentage of all musicians)

source of work	main sources of work (%)	main sources of income (%)
Ballrooms	4	3
Concert halls/ arts centres	13	14
Cruise ships	1	2
Festivals and outdoor	16	14
Holiday centres	2	1
Hotels and restaurants	15	20
Jazz clubs	17	14
Theatres	8	8
pubs	16	12
Other	8	12

Those venues mentioned most frequently in terms of the quantity of work were jazz clubs (mentioned by 68% of musicians), pubs (mentioned by 65%) and festivals (mentioned by 61%), while those mentioned most often as important sources of income were hotels and restaurants (mentioned by 39% of musicians), jazz clubs (mentioned by 28%), festivals/outdoor events (mentioned by 28%) and pubs (mentioned 23%). Only 9% of musicians said they had worked outside the UK in the previous 12 months.

“The majority of my work at present seems to be in the function area of hotels, bars and restaurants. There are fewer pickup gigs in pubs than five years ago, the revenue from the spadework helps to fund personal projects and tours usually around the UK.”
Full-time double bassist, London

Table 33 shows the principal instrument of the jazz musicians responding to the questionnaire. The largest groups of instrumentalists were keyboards players and saxophonists (17% each). This was followed by almost equal numbers of players on four other instruments or instrument groups and of vocalists.

TABLE 33 UK jazz musicians: main instrument (percentage of all musicians)

Jazz musicians' main instrument	**% of all jazz musicians**
Keyboards	17
Drums	11
Saxophones	17
Guitar	11
Bass	12
Brass	13
Voice	11
woodwind	7
other	2

Only 14% of the respondents to the questionnaire were women jazz musicians and two-thirds of these were vocalists. Table 34 shows that 'Voice' was the only category in which female musicians were in the majority.

TABLE 34 UK Jazz musicians: gender and main musical instrument. 2004. (percentage of each instrument category)

main instrument	**Males as % of jazz musicians playing each main instrument**	**Females as % of jazz musicians playing each main instrument**
Keyboards	86	14
Drums	100	0
Saxophones	95	5
Guitar	97	3
Bass	96	4
Brass	96	4
Voice	20	80
Woodwind	90	10
All musicians	86	14

More than 95% of respondents described their ethnicity as white British or white European, as shown in Table 35. The remaining 5% including musicians of Afro Caribbean, African, Asian and mixed race origins.

TABLE 35 UK jazz musicians: Ethnicity (percentage of all musicians)

Ethnicity	% of all jazz musicians
White British	88
White other	7
All others	5

"There are plenty of part jazz venues (because jazz is the cheapest form of live music available, but for the young musicians, there are no ladders to climb in the present jazz scene."
Part-time baritone sax player, South East England

TABLE 36 UK Jazz Musicians: Age Range 2004 (percentage of all musicians)

Age group	% of all jazz musicians
Under 26	3
26-35	11
36-45	24
46-55	22
56-65	22
66+	18

The age profile of the respondents to the musicians' questionnaire shown in Table 35 included a relatively small number of young players – only 14% were under 36 years of age. The largest cohort was aged between 36 and 45 (24%) closely followed by the 46-55 group and the 56-65 group (each 22% of all musicians). Perhaps in sync with this, over half (55%) said that their professional jazz career had begun more than 20 years ago.

APPENDIX 1
LOCATIONS OF MAJOR JAZZ FESTIVALS IN THE UK 2004 and 2005

Aberdeen
Appleby
Birmingham
Blackpool Jazz Party
Borders (Festival of Jazz and Blues)
Brecon
Bude
Chatham (Waterfront Jazz Festival)
Cheltenham
Cleethorpes
Corsham
Coventry
Cowbridge
Derby
Ealing
Edinburgh
Fishguard
Gateshead
Greenwich (Riverfront Jazz Festival)
Harlow (BJF)
London (Generations Festival)
London Jazz Festival
Glasgow
Guernsey
Hayling Island
Hayne Barton (Devon)
Holywood (Northern Ireland)
Hull
Islay
Isle of Man
Isle of Wight
Jersey (Jazz in the Park)
Largs
Leamington
Llangollen
London
London/Polish
Ludlow
Manchester
Margate
Marlborough
Marsden
Nairn
Pontypool
Porthcawl
Preston
Ramsgate
Scarborough
Southend
Southport
Swanage
Swindon
Teignmouth
Tyneside (On The Outside)
Wavendon (Jazz Weekend)
Wellingborough
Whitley Bay
Wigan
Wrexham (North Wales)

APPENDIX 2
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APPENDIX 3
METHODOLOGY

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

1. Postal questionnaires
Two large-scale questionnaires were constructed with the assistance of computer scientist Catherine Loveday of the University of Westminster.

The first of these was sent to over 2,000 musicians listed on the Jazz Services database and to a further 1,200 members of the Musicians Union jazz section. Because of data protection restrictions, the researchers could not amalgamate these two lists and therefore some jazz musicians received two copies of the questionnaire. We believe that there is very little or no double submission as the second posting (to MU members) contained a reminder that the same questionnaire had already been mailed to those included on the JSL list. The response rate was about 30%.

The second questionnaire was sent to UK-based promoters listed on the JSL database. The response rate was about 25%.

2. Content analysis
This type of research was used mainly in two areas. The main results of the analysis of media coverage of jazz came from a detailed survey of national print and broadcast media over two four-week periods. This survey noted all mentions of jazz in national newspapers published in London and all jazz radio and television broadcasts. The second use of content analysis was to analyse the venues listed in the publications *Jazz UK*, *Jazz Guide* and *Jazz in London* and the frequency with which they presented jazz events.

3. Interviews
The researchers undertook a number of open-ended (unstructured) interviews with a wide range of figures in the jazz sector. These included individuals from funding agencies, the Musicians Union, the regional jazz organisation and jazz development sector, concert promotion, higher education and magazine publishing. There were also a number of semi-structured telephone interviews with record company managers and owners, in order to ascertain general data about this sector. Similar interviews were undertaken by Norton York of Rock School for the section on jazz education.

4. Analysis of published reports and accounts
The section on audience research was based mainly on national market research surveys undertaken by bodies such as arts councils, as the research team did not have resources to carry it its own audience surveys. The annual reports or accounts of various funding agencies, local authorities, higher education institutions and government departments were analysed to determine the types and level of financial support for jazz, including for jazz education. In addition, several academic reports on festivals commissioned by arts funding bodies provided valuable information.

The quantitative estimates for the size of the sector were generally calculated from two or more sources in order to double-check the data and make the published figure more robust.

For example, the number of jazz performance events was calculated by comparing:
(a) grossed-up figures from the promoters' questionnaire
(b) content analysis of the listings pages in Jazz UK and Jazz in London.
(c) Jazz musicians' research by Jazz Services carried out in 2003.

APPENDIX 4
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Oliver Weindling, Babel
Tony Whyton, Leeds College of Music

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Dave Laing is a freelance researcher, writer and editor. His previous research activities include projects for the National Music Council, the Musicians Union and the European Music Office. He is an editor of the Continuum Encyclopedia of Popular Music of the World and co-author (with Sarah Davis) of the Guerilla Guide to the Music Industry. He is a visiting lecturer at the University of Liverpool and was formerly Reader in Music at the University of Westminster.

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