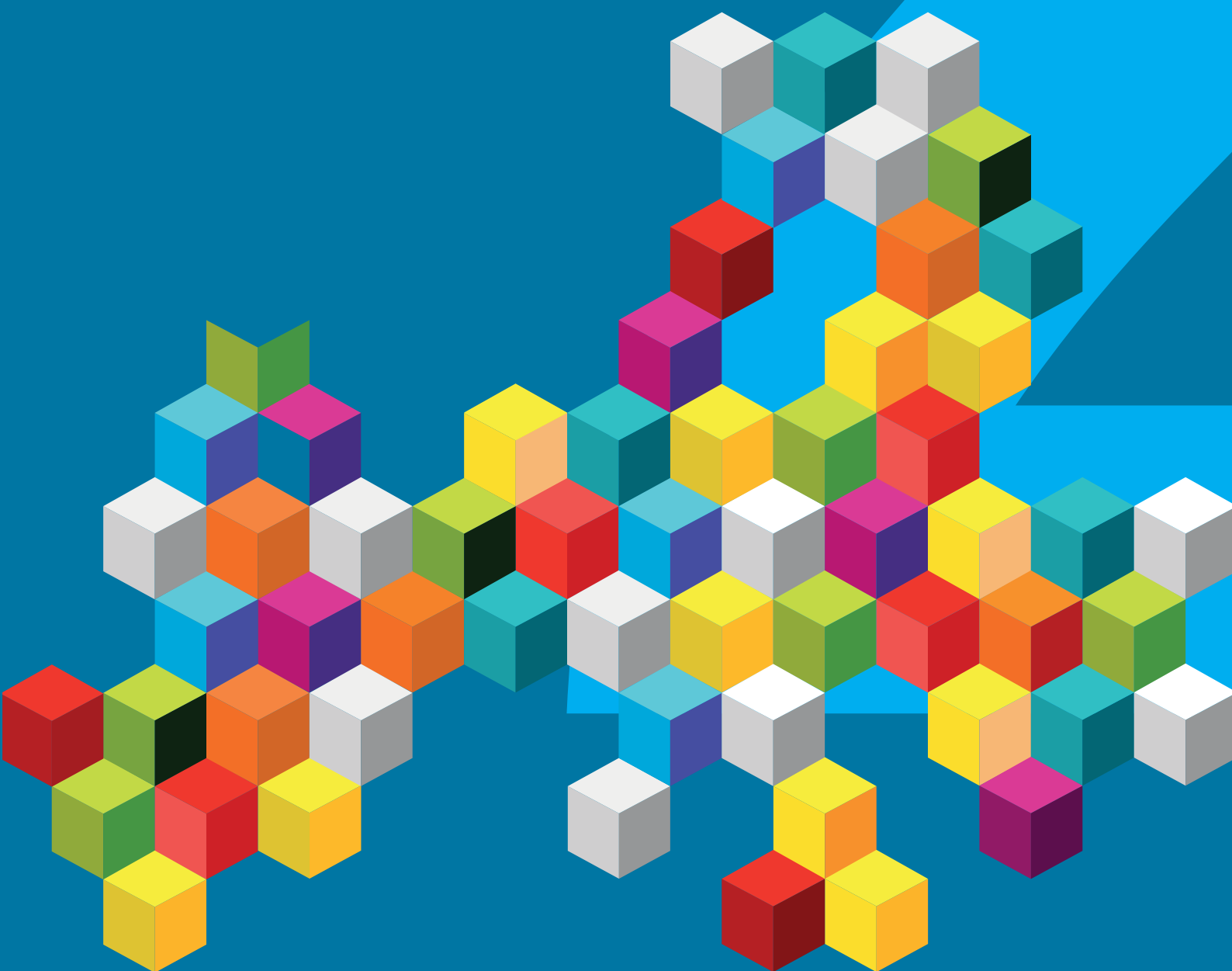




STRENGTH IN NUMBERS

A STUDY OF
EUROPE JAZZ NETWORK



FIONA GOH

with foreword by **PROFESSOR TONY WHYTON**

2016

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ABOUT EUROPE JAZZ NETWORK

EUROPE JAZZ NETWORK (EJN) was created in 1987 as a Europe-wide association of promoters, presenters and supporting organisations who specialise in creative music, jazz and improvised music from a distinctly European perspective. Its membership currently comprises 110 organisations (festivals, clubs and concert venues, independent promoters and national/local support organisations) in 31 European countries.

EJN exists to promote the identity and diversity of creative music in Europe and to broaden awareness of this vital area of music as a cultural and educational force. It aims to increase exchange of knowledge and experiences between professionals of the creative sector and to initiate and encourage the development of international exchanges, special projects and collaborations between promoters and artists both within and outside of Europe.

Throughout its history, EJN received different funding from the European Union. Since 2014 EJN is co-funded by the Creative Europe programme for cultural networks. Through this grant, EJN has been able to implement a set of activities and pilot projects across its membership on topics such as environmental sustainability and gender balance in the music sector, the development of performances for young audiences using jazz and improvised music, the influence of migrant communities in the European music landscape and the use of improvisation as a tool for multidisciplinary international collaborations.

The main activities of EJN include the organisation of a yearly European Jazz Conference addressed to professionals of the music sector from Europe and beyond, the EJN Award for Adventurous Programming granted each year to a European promoter and the Research programme aimed at analysing the impact and relevance of this sector in the European cultural landscape.

EJN believes that creative music contributes to social and emotional growth and economic prosperity, and is a positive force for harmony and understanding between people from the diversity of cultures inherent in the European family. It is an invaluable channel for the process of inter-cultural dialogue, communication and collaboration.

FOR MORE INFORMATION:

www.europejazz.net



FOREWORD

'EJN's membership is the lifeblood of innovation and creative practice in Europe...it continues to demonstrate the value of jazz in bringing people together, to work across borders and tackle social issues through creativity'

Jazz is increasingly becoming recognised as an integral part of European cultural and creative life. The music plays a crucial role in the development of artistic cultures, new voices and hybrid forms and, since 2011, has been recognised by UNESCO as an international artform that supports cultural understanding and social change. Within this context, Europe Jazz Network (EJN) has played a lead role in promoting and celebrating the value of jazz across Europe. The Network's membership is the lifeblood of innovation and creative practice in Europe and clearly understands the importance of collaboration, networking and improvisation in bringing people together from different walks of life. At a time when the value of the European Union is being interrogated, when nationalistic and xenophobic attitudes permeate a number of European countries, and when European leaders disagree on solutions to the refugee crisis, EJN continues to demonstrate the value of jazz in bringing people together, the music's ability to work across borders and nation states, and its potential to tackle meaningful social and cultural issues through creativity and innovation.

This report – 'Strength in Numbers 2' – provides compelling evidence for the impact of jazz within the European cultural and creative economy. Since the publication 'Strength in Numbers' in 2012, EJN has clearly grown in size and ambition; network members continue to develop collaborations and partnerships across Europe and beyond, and there is a continual drive and passion among the membership for new programming ideas, creative ways of engaging audiences, and nurturing new talent. Today, EJN's membership is incredibly diverse and speaks for a range of stakeholders in different European settings. Reading this report, it is not only possible to get a sense of the significance of EJN in economic terms – indeed, the figures provided by EJN members only offer a glimpse of the full economic impact of jazz in Europe – but also the way in which the network responds creatively to a number of European societal challenges. Over the last few years, for example, the network has been leading programmes that promote gender equality, that engage with green issues, sustainability and carbon reduction, that involve intergenerational learning, that engage with migration and social mobility, and that celebrate the rich cultural heritage of jazz and different European places. EJN members demonstrate the continued

cultural power of jazz and its ability to speak to different communities of interest. In parts of Europe today, jazz works as a symbol of renewal and liberation, whereas in other settings it provides the perfect means of developing links to cultural tourism and the regeneration of cities and regions. It can provide a platform for previously marginalised voices or re-animate spaces and seek to reconcile problems linked to Europe's past.

When comparing the findings of 'Strength in Numbers 2' with the previous report, there is a marked increase in membership and box office income for the network, and audiences are growing. Whilst the quantitative figures linked to programming, audience participation and box office should be interpreted positively, the decline in public subsidy for jazz across the network is particularly worrying. Whilst funding cuts have impacted on the creative and cultural more broadly, the lack of national infrastructure for jazz in some European settings has meant that a decline in public subsidy for the music has been severe. Despite these cuts in support in many national contexts, it is a sign of the creativity, innovation and ingenuity of EJN members that the music continues to thrive and new audiences are being brought to the music for the first time. One can only imagine the profound impact that jazz – and the Europe Jazz Network – would achieve if an adequate level of public subsidy was afforded to members within different nation states. This report should serve as a clarion call to EJN members, funders, policy makers and the broader cultural sector, in providing evidence for the unique contribution that jazz makes to Europe's cultural and creative economy.

Europe Jazz Network provides an exemplary model of the power of creative networks, of the commitment of organisations and individuals to work creatively to address common problems and jazz's ability to stimulate conversations and encourage innovation in everyday life.

**Professor Tony Whyton
Birmingham City University**



INTRODUCTION

Since the publication of the first Strength in Numbers report in 2012, EJM has become further convinced of the importance of research into the scale and impact of the work of this important music sector, particularly as our membership has grown significantly in the intervening four years – from 80 member organisations from 26 countries in 2012 to over 110 festivals, clubs, venues and national organisations across 31 countries in 2016 - including new members from Russia, Bosnia and Serbia among others.

The report makes clear the impact EJM members' activities have as employers, contributors to their local and regional economies, supporters of both emerging and established artists and as commissioners of new and exciting work. Although the worst of the economic recession in Europe may in some areas be a thing of the past, that is certainly not true in all cases and we hope that the evidence in the report about the substantial impact of our members' activities will prove helpful in justifying support from the various stakeholders involved.

Alongside the data presented, it is the individual case studies - from Sarajevo, Paris, Gateshead, Wrocław, Ghent, Budapest, Moers, the Czech Republic, Finland, Norway and Italy - which show how varied the work is, and how members have worked to overcome the financial

and political challenges they face. In these turbulent times in Europe, it is perhaps the stories of how our members' work can illustrate a different way of living and working with others which are particularly inspiring. As Edin Zubčević from Sarajevo Jazz Festival comments 'we change society in a way for a week- people are different, people behave differently.... The Festival could inspire people to be better.'

Our professional research colleague Fiona Goh, supported by the Research steering group drawn from the EJM Membership, has worked tirelessly to extract the data and information from our busy members - some of whom have limited administrative support - and we thank her again for her dedication and good humour!

We are also extremely grateful to the European Union, through the Education, Audiovisual and Culture Executive Agency (EACEA), for their generous financial support for our activities overall, and their continued interest in the outcome of our research in particular.

We hope you find Strength in Numbers 2 interesting, useful and an indication of the continued development of our powerful network of diverse and energetic members - all committed to the power of jazz and creative music in society.

Ros Rigby, EJM President



METHODOLOGY Overall process

The main quantitative and qualitative findings of the research were collected through a detailed online questionnaire administered through Survey Monkey survey software. (see Appendix 1 for the full questionnaire.) The questionnaire was designed in consultation with EJN's research steering group, comprising Fiona Goh, Antoine Bos, Tony Dudley-Evans, Ros Rigby, Katrien van Remortel, Annamajja Saarela, Professor Tony Whyton (Birmingham City University) and Giambattista Tofoni, Francesca Cerretani and Stefano Zucchiatti of EJN. Following member feedback at the 2014 Europe Jazz Conference in Helsinki, a draft questionnaire was circulated to the steering group and member panel for testing and feedback. The questionnaire was launched to members in April 2015 and, as was the case for Strength in Numbers, a second shorter questionnaire (see Appendix 2) comprising 10 key questions was circulated to non-respondents in July 2015 to gather responses for key questions from a greater number of respondents.

In addition to the online questionnaire, a number of detailed one-to-one interviews were conducted with members by Fiona Goh and Professor Tony Whyton during the period September 2015 - April 2016, and the resulting case studies are included within this report ¹. Case study respondents were either self-identified through the questionnaire or nominated by members of the research steering group.

Scope of the research

In consultation with the membership, it was agreed that the research questions should be based on the financial year 2013, as this was the most recent year about which members would be able to give full and verified financial information. Where members' financial years did not match the calendar year, they submitted information relating to the year in which the majority of 2013's artistic activity took place (for example, where a festival's financial year ran from June - May, we would take the financial year in which the 2013 festival took place). This also enabled helpful comparisons with the 2014 financial year. Some additional financial questions were included to bridge the gap between the data presented in Strength in Numbers and

the year of collection (2013) in Strength in Numbers 2, to give a longitudinal picture of development.

Membership variety

This report paints a picture of an extremely active and diverse membership who are united by their engagement in jazz, but by no means are solely defined by it. In terms of gathering data for the research, we have attempted to collect data on the registered member. In some cases, this is an organisation within a larger whole, whereas in other cases the membership organisation is a large organisation, for whom jazz is a relatively small, if significant, part of their overall activity (such as Sage Gateshead in the UK). For all members, we asked for a consistency of approach, so that their responses throughout the questionnaire related to the same organisation, and the question about the % of resources expended on jazz (Question 6) was designed to give clarity about the proportional focus on jazz within the organisation, as well as demonstrating the variety of approaches across the membership.

Currency

As many, but not all, of EJN's members operate using the Euro, we asked all members to supply financial data in Euros. To ensure consistency of members' responses, we supplied conversion rates for all relevant currencies, based on the average exchange rate between each country's currency and the Euro in 2013. As last time, we used the European Central Bank's Statistical Data Warehouse (www.ecb.europa.eu) where currencies were listed. Alternative average exchange rate data had to be provided for the following currencies: Icelandic krona (from www.ukforex.co.uk); Macedonian denar (from www.exchangerates.org.uk) and the Serbian dinar (from www.nbs.rs - National Bank of Serbia), taken from average rates across 2013 in all cases. The full questionnaire (see Appendix 1) lists the conversion rates supplied.

As this is the second Strength in Numbers study, there is a value in comparing data from the two reports and starting to produce a longitudinal picture of the sector across time, measured in various ways. The research process was designed to

¹ All the data and case studies presented in the report are reflective of members' details at the time of data collection, and we are aware that in some situations, members' details have changed between the period of data collection and publication.

enable this kind of comparison across the two studies, but caution needs to be exercised when comparing financial data from the two reports because of the impact of the rate changes on the data. Of the 16 currencies used by EJM members, 4 were not used in 2009 and 1 did not change from its 2009 Euro exchange rate. Of the remaining 11 currencies, the relative change in exchange rates ranged from 1% - 23% during the period 2009 - 2013, giving the potential for a significant impact on the data presented ².

Statistical approach

Throughout the report, the measure of central tendency used to calculate averages is the arithmetic mean (e.g. divide the total number of events promoted by ten respondents by 10 to find the average number of events promoted per respondent), so where we use the word 'average', it refers to the mean. Where this measure of central tendency is like to be skewed - for example, where a small number of respondents promote significantly more events than the rest of the respondents - we have used another measure, such as the median (e.g. the value of the variable at the midpoint of any data - one half of the data will have values below the median, and the other half will have values above it) but this alternative measure is specified on each occasion.

Extrapolation

Given the broad variety of respondents, and their similarly broad range of quantitative responses, the most appropriate method to extrapolate the data up from the respondents to the full membership is by using the trimmed mean. This method removes a number of outliers from the

data (i.e. those figures which are extremely large or small in comparison to the rest of the data), typically between 5% - 25% of the data set at top and bottom, then finds the average of the remaining figures. The trimmed or truncated mean may be familiar to those who watch ice-skating, where the top and bottom scores are removed and the remaining figures are averaged.

Where we have used the trimmed mean as a methodology to extrapolate data up to the full membership, we have stated the % trimmed in each case. To extrapolate in this way, we multiply the trimmed mean by the full membership minus the number of outliers (e.g. based on a 5% trimmed mean for 100 respondents, there will be 10 outliers removed - 5 at the top and 5 at the bottom), then add on the actual data from the excluded 10 outliers, in this example. This ensures a more accurate measure of central tendency is used, but also includes the sometimes very large outliers posted by respondents.

Rounding up

Decimal places of 0.5 or greater have been rounded up. Those of 0.4 or below have been rounded down. Occasionally, figures may add up to 99% or 101% due to the effects of rounding up or down.

Financial data and multipliers

All the data given in this report (e.g. members' own responses to queries about their income, expenditure and activities) are self-reported and have not been independently verified. Data submitted has been checked for internal consistency (e.g. to check that income received from different named sources does not exceed the total listed income for the year) and

where inaccuracies have been identified, we have liaised with respondents to correct errors. Where multipliers have been used in the report to demonstrate the economic impact of, for example, members' expenditure, a rationale for their use has been given. Choice of multiplier is often contentious and it can be argued that there is no one multiplier which is appropriate to be applied to multiple geographic settings, given that the economic conditions in each setting are likely to vary significantly. Given that this is not possible for multi-region research, we have quoted multipliers widely used in other similar research in the sector.

Response rates

The brief for this research was complex and demanding, and the resulting questionnaire was similarly challenging in its scale. In any context, members' response rate of 61% to the questionnaire (including the follow-up questionnaire) would be impressive, but given the scale of the questionnaire and the limited resources of respondents, this overall response is again extremely strong. Once again, the EJM membership should be commended on its commitment to the research project, demonstrated by member involvement in the development of the research as well as its execution. Members were also generous with their time in 1:1 interviews, again in the context of limited time and, often, under-resourced organisations. Given the high response rate and the similarity of profile between member organisations and respondents types, we feel it is justified to draw conclusions about the full membership based on an extrapolation of the data given by respondents.

² This shows the exchange rates used for the relevant currencies of EJM's membership and the figure in brackets is the rate used in 2009:
Bosnian Convertible Marka (BAM) 1,95583 (n/a in 2009) = €1
Czech koruna 25,98 (26,435) = €1 - 2% decrease in strength of Euro
Danish krone 7,4579 (7,4462) = €1 - 1% increase in strength of Euro
Hungarian forint 296,87 (280,33) = €1 - 6% increase in strength of Euro
Icelandic krona 162,206675 (n/a in 2009) = €1
Lithuanian litas 3,4528 (3,4528) = €1 - no change
Macedonian denar 61,755079 (n/a in 2009) = €1
Norwegian krone 7,8067 (8,7278) = €1 - 12% decrease in strength of Euro

Polish zloty 4,1975 (4,3276) = €1 - 3% decrease in strength of Euro
Romanian leu 4,419 (4,2399) = €1 = 4% increase in strength of Euro
Russian rouble 42,337 (44,1376) = €1 - 4% decrease in strength of Euro
Serbian dinar 113,0774 (n/a in 2009) = €1
Swedish krona 8,6515 (10,6191) = €1 - 23% decrease in strength of Euro
Swiss franc 1,2311 (1,51) = €1 - 23% decrease in strength of Euro
Turkish lira 2,5335 (2,1631) = €1 - 15% increase in strength of Euro
UK pound sterling 0,84926 (0,89094) = €1 - 5% decrease in strength of Euro

EXECUTIVE SUMMARY

Europe Jazz Network's research programme, supported by the Creative Europe programme of the European Union, asked EJN's members to complete a detailed online survey, collecting a mixture of qualitative and quantitative data about their organisations in 2013, including questions about finances, staffing, events and audiences. This was followed up by a qualitative research process with selected members to explore and illustrate innovative projects being undertaken by EJN members, often in creative partnerships across Europe.

The questionnaire achieved a response rate of 61% and the full report analyses the responses in detail, as well as extrapolating the responses from respondents to give an estimate of the activities of the full EJN membership. In all, the study demonstrates the diversity and depth of EJN's members, and reaffirms EJN's position at the centre of Europe's complex cultural and creative ecology.

EJN MAKES A SIGNIFICANT CONTRIBUTION TO LOCAL AND CULTURAL ECONOMIES.

It generates income through a broad variety of sources, and in turn supports local economies and is an important employer of artists in Europe:

- total income of **€167** million
- ticket sales worth **€30,2** million
- generated **€71,7** million in public funding investment and **€12,8** million in commercial business sponsorship
- total expenditure of **€176** million
- economic impact of at least **€439** million
- supported the local economy: **40%** of total expenditure was spent locally

- significant employers of artists, spending **€32,4** million directly on artists

EJN IS AN IMPORTANT EMPLOYER.

It generates crucial jobs in the cultural sector, backed by substantial voluntary input:

- **1.337** full time equivalent (FTE) staff supported by **489** voluntary board members and an additional **3.479** volunteers
- generated **22.585** days of volunteer support, spending **52%** of their time on professional or managerial tasks and **48%** on manual or unskilled tasks
- volunteer support worth at least **€965.000**
- an average gender balance across its member organisations of **55% men** to **45% women**

EJN IS A CULTURAL POWERHOUSE OF ACTIVITY ACROSS THE CONTINENT.

It welcomes large audiences to a diverse range of events:

- **25.276** events were presented, or **69** events per day; this included **410** events in other countries and **4.062** free events
- an audience of **4,9** million attended events, including **1,4** million at free events
- online audience engagement included **11,7** million website page views, **155.000** Twitter followers and **389.000** Facebook likes
- a further **6.294** members were reached through its own organisations' membership, ranging from individual musicians to ensembles, festivals and journalists



Jazz Fest Sarajevo © Jasmin Brutus

'The festival is really important and influences society in a very good way... we change society for a week - it is too bad there is nothing to sustain the effects we create'

CASE STUDY:
**RE-CREATION: JAZZ AS A TOOL
FOR SOCIAL COHESION**
**JAZZ FEST SARAJEVO/
BANLIEUES BLEUES**

JAZZ FEST SARAJEVO is EJN's only member in Bosnia & Herzegovina and under the direction of its founder, Edin Zubčević, it has grown in ambition and success since its launch some 18 months after the end of the Bosnian war. Celebrating its 20th anniversary in 2016, Zubčević is clear that the social context for the festival is central in terms of challenges and identity: **"Organising a festival in post-war Bosnia is a big challenge, in terms of lack of infrastructure, and the fact that we are a poor country, heavily corrupted and still a neglected society. I had the idealistic idea to celebrate freedom by creating an international jazz festival, as jazz for me is the music of the free man. My idea was to build a festival to celebrate differences because every single festival - if it's a good festival - should do this and, post-war, we are still living in a troubled multicultural society. Our main stage is in an ex-Jewish temple in a middle of a town surrounded by other mosques and churches, so for**

me it's the perfect setting. The music I wanted to present was different itself, and the musicians were not only different from everyone else but diverse amongst themselves too." In this challenging context, Zubčević argues that the potential rewards are also greater: **"We're living in a society which, for centuries, had a lot of differences that had brought advantages and weren't so contested, and suddenly during the war these differences became a reason to fight and to hate each other, and in a very brutal way. I found that the most dynamic and attractive work happened in places where different influences, traditions and celebrations got together to create something new and fresh. And if that happened in music, it could happen in society."** The ambitions for the festival are significant, although Zubčević acknowledges the festival has limited long term impact unless there is additional infrastructural change: **"I never considered that it was just a festival, a series of concerts - I like**

to think that we're doing something more than that. We provide people with hope and maybe it sounds a little bit ambitious or pretentious, but the festival is really important in terms of relationships inside society and really influences society in a very good way. The festival could inspire society to be better. It's too bad from our point of view there is nothing which can sustain the effects that we always create when we do the festival - we change society in a way for the week, people are different, people behave differently, and everything is different."

For **BANLIEUES BLEUES'** Xavier Lemettre, working in the Paris suburbs to sustain a festival, venue and large scale education programme, the context is very different but the underlying ethos has similarities: **"The festival was created to bring high value musical projects into the suburbs and to make great gigs, to put the music where it has to be: not only in the centre of the city but also in the suburbs."** For the Communist mayors who founded the festival, Lemettre is sure why it had to be jazz: **"When Banlieues Bleues was founded in 1984, jazz was not really in fashion, but for those mayors, the value of jazz was the value of a music which tried to emancipate itself from aesthetic rules, and was music of the former slaves - in fact, for them jazz was the music of freedom, not something commercial for sure."** When the festival went on to found its education programme Actions Musicales in the 1990s, the benefits of working with jazz as a tool for social cohesion were compelling: **"We discovered on the ground that jazz was a way to integrate many different people, many different generations, people from different cultural backgrounds. In getting kids or teenagers coming from many**

different contexts to work together, jazz is also a great tool because it allows individual expression, and recognises and valorises everyone's voice or sound, but at the same time, the collective is as important as the individual. In a way, jazz is the perfect music to be in society and to experiment with how things can be in society." The aural transmission of jazz means that participants need no musical training and can very quickly access high level musical thinking. Lemettre believes this speed and immediacy are crucial: **"It's music, and music speaks to young people in a much more immediate and direct way than theatre or literature."**

The programme is large scale and ambitious; in 2015, Actions Musicales worked with 115 partner organisations, including schools, universities, hospitals, jails and youth services, and together they delivered 73 projects, including 21 residencies. Despite the obvious social benefits of working in this way, Lemettre is keen to underline that the over-riding concern of the project is artistic: **"One rule we made is that this isn't a social project; it's an artistic project, and we are dealing with professional musicians and very diverse groups. The process is as important as the result of any project, and we take the process very seriously."** The project outcomes are often linked to festival events, including the high profile festival commissioned White Desert Orchestra project in 2015, which involved pianist Eve Risser working with 110 adults and children. Despite the success and obvious benefits of Actions Musicales, it is becoming increasingly difficult to fund:

"Last year, 5,886 people were involved but the programme was smaller than before due to decreased funding. Although it's becoming more and more difficult to fund these activities, we really fight to find this money. It's strange because in the world we live in, it should be easier to find money for these projects as they're so important."

'Jazz can integrate many different people and cultural backgrounds...the collective is as important as the individual so it's the perfect music to experiment with how things can be in society'

Banlieues Bleues Subway Moon © Eric Garault



RESPONDENTS' PROFILES

1

1.1 Respondent numbers

An invitation to complete the online questionnaire was e-mailed to 99 eligible members (see Appendix 3 for the full list); the then current membership list of 102 excluded three honorary members who were ineligible for inclusion. Of the 99 members invited to respond, we received questionnaire responses from 60 members, or a 61% response rate. A further 4 members participated in case study interviews, bringing the response rate across the whole research programme to 66%, which is extremely good, although lower than the rate achieved in the original Strength in Numbers research ³. The total number of responses received - 60 for the questionnaire, and 64 for the research overall - is similar to the number of responses received for Strength in

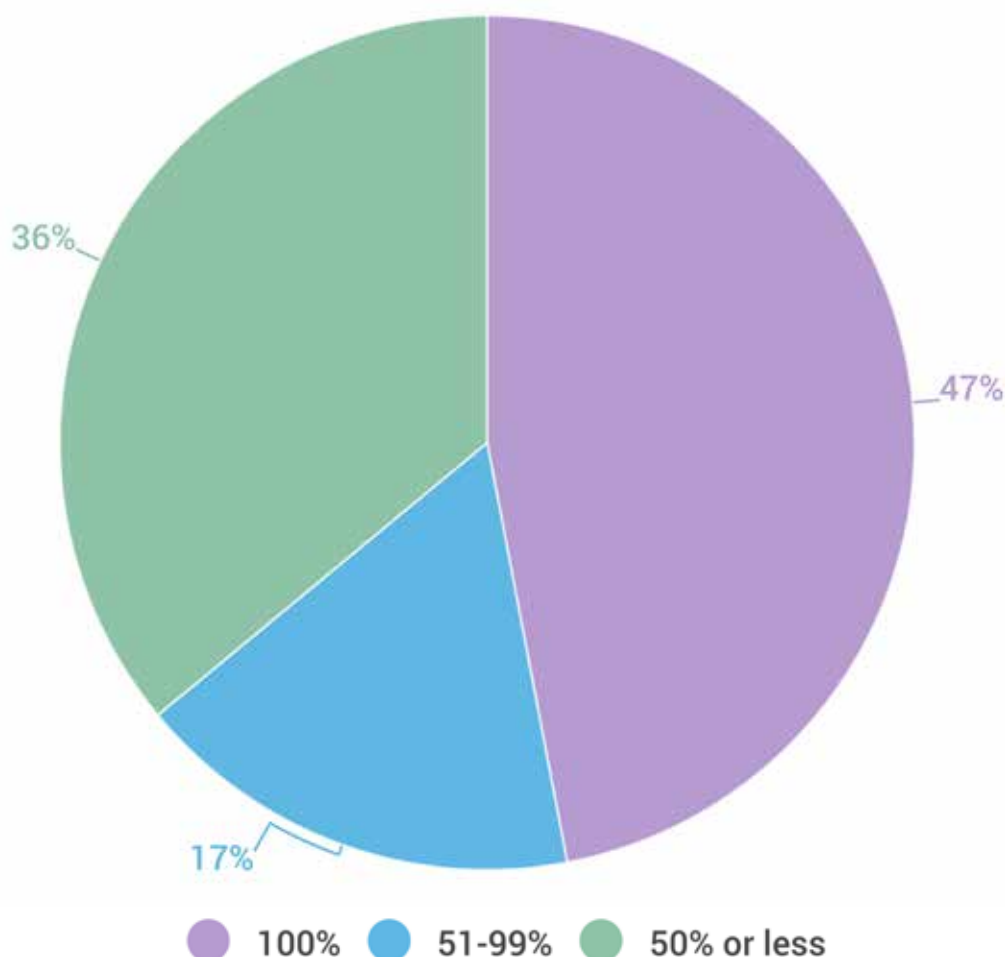
Numbers (55), although EJJN's membership has grown since the original research was undertaken, making the response rate proportionally smaller.

1.2 Type of organisation

As this report will demonstrate, the membership of EJJN continues to be diverse, ranging from voluntarily run organisations to those with significant staff and resources. Just under half of the respondents are dedicated only to jazz, whereas many members feature jazz as part of a broader portfolio of activities.

Of the 58 organisations who stated the % of time and resources (including expenditure and personnel) their organisation spent on jazz in 2013, just under half (27 organisations, or 47%) were 100% dedicated to jazz:

RESOURCES EXPENDED ON JAZZ FIGURE 1 RESPONDENTS: 58



³ A rate of 84% was achieved for Strength in Numbers, and the reduction in response rate may be attributed to a reduced lack of enthusiasm from the general membership for the research in its second iteration or a proportionally slightly less active membership. Lower response rates from some territories may also reflect the language barrier in responding to a relatively complex questionnaire in English.

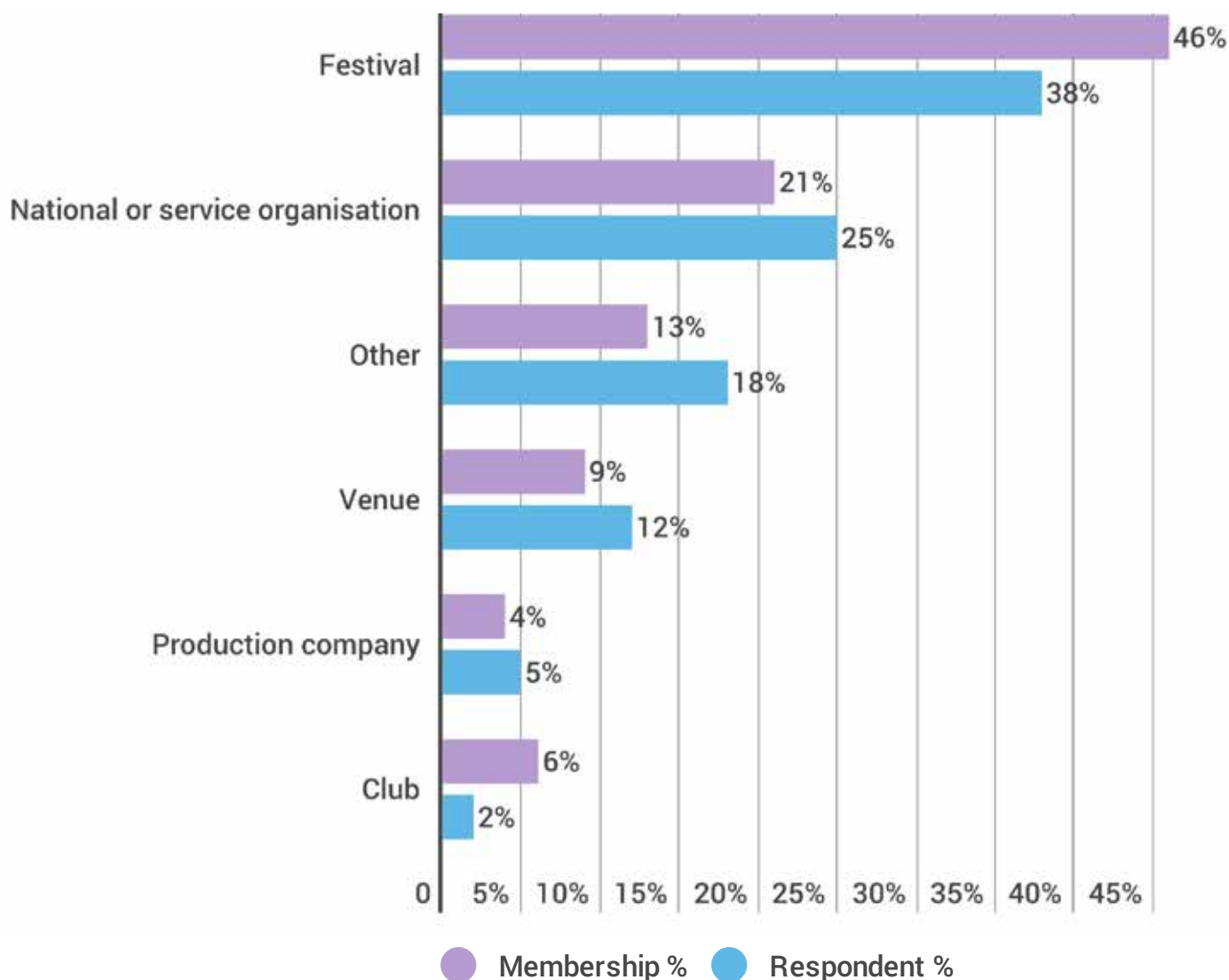
The remaining 53% of respondents gave a broad range of resources to jazz, ranging from 4% of their resources up to 98%. Of these, just over a third (21 organisations, or 36%) expended less than 50% of their organisational resources on jazz.

All types of organisation answered the same questionnaire this time, rather than asking slightly different questions of national organisations as compared to non-national organisations, and the questionnaire allowed respondents

simply to filter their question choices from the same pool of questions, based on responses (e.g. those members who are themselves membership organisations were able to answer further questions on this, and other members skipped this section of questions if irrelevant). We asked all respondents to identify their organisational type from a short list of options, developed in consultation with members and reflecting the broad spread of activity across the network. Of the 60 respondents, the largest respondent

type was festival (38%), followed by national or service organisations (25%). Of those respondents who identified themselves as ‘other’, this primarily refers to organisations that undertake a broad variety of activities (venue, educational projects, festival, other event promotion) or are a musical ensemble, or both. This chart gives a full breakdown, and compares the organisational type of respondents to the full research population:

ORGANISATION TYPE **FIGURE 2 RESPONDENTS: 60**



Compared to the membership profile of the whole network, the organisational profile of respondents is similar enough to support extrapolation of data from the respondent population to the full research population. As might be expected, there was a slightly higher response rate from national or service organisations proportionally, given the typical structure and focus of those organisations, and proportionally lower responses from the other membership types.

1.3 Location

At the time the research was undertaken, EJNI had membership in 30 countries (was 24 in 2011), listed below, and we had questionnaire responses from members in 23 of those territories. The number of respondents compared to the number of eligible respondents is shown in brackets after each country (e.g. 4 of 5 means we had 4 respondents out of 5 eligible respondents in that country). The seven countries missing from the research results are marked with an asterisk *, and of these seven, five are countries with a single member.

The team made especial efforts to encourage participation by members in countries without representation to date but without success. Although EJNI is an English speaking network, language may have formed a barrier to participation, and this is something which would need to be addressed in a future study.

Austria	(1 of 2)
Belgium	(4 of 5)
Bosnia and Herzegovina	(1 of 1)
Czech Republic	(1 of 2)
Denmark	(2 of 3)
Estonia	(2 of 2)
Finland	(6 of 6)
France	(3 of 4)
Germany	(4 of 7)
Hungary	(2 of 3)
* Iceland	(0 of 1)
Ireland	(1 of 1)
Italy	(2 of 12)
* Latvia	(0 of 1)
Lithuania	(1 of 2)
Luxembourg	(1 of 1)
* Macedonia	(0 of 1)
Norway	(10 of 12)
Poland	(1 of 2)
Portugal	(2 of 2)
* Romania	(0 of 3)
* Russia	(0 of 2)
* Serbia	(0 of 1)
Slovakia	(1 of 1)
Slovenia	(1 of 1)
Sweden	(2 of 5)
* Switzerland	(0 of 1)
The Netherlands	(4 of 4)
Turkey	(1 of 2)
United Kingdom	(7 of 9)

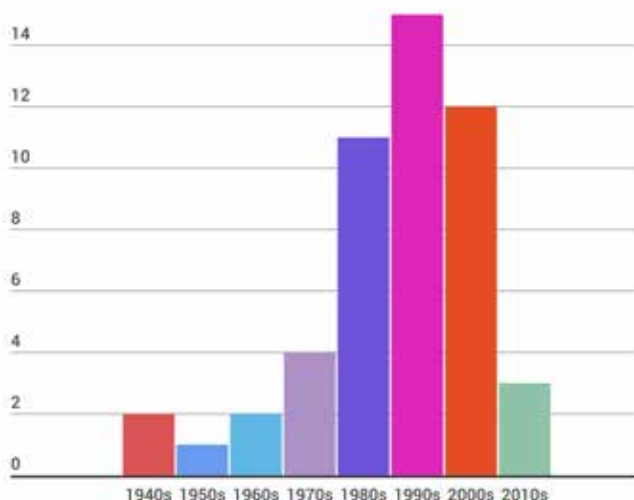
RESPONDENTS LOCATIONS FIGURE 3



1.4 Year founded

The largest proportion of respondents (30%) were founded in the 1990s, with 24% founded in the 2000s, and 22% founded in the 1980s:

MEMBER ORGANISATIONS' DATES OF BIRTH FIGURE 4 RESPONDENTS: 51



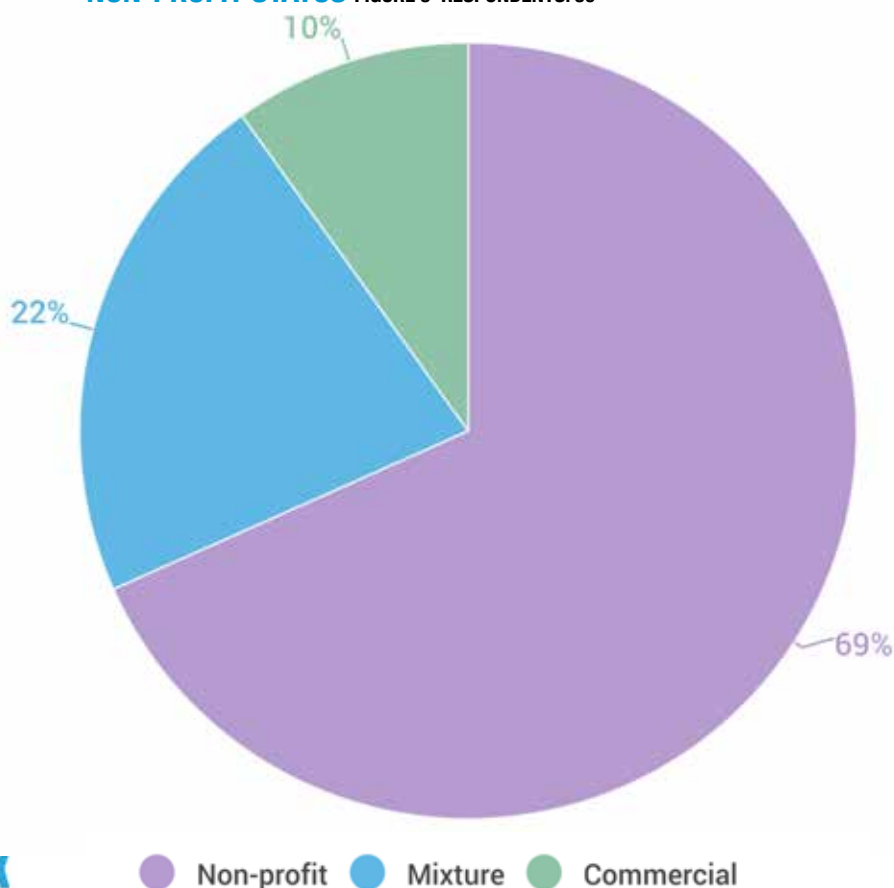
This is a broadly similar picture to the findings of Strength in Numbers, where the respective figures were 1990s - 31%, 2000s - 15% and 1980 - 20%.

1.5 Non-profit status

The majority of respondents, just over 2/3, were wholly non-profit making organisations (68% of 51 respondents).

22% undertook a mixture of non-profit and commercial activities, including some who operate different legal entities for their different activities (e.g. registered charities and separate commercial organisations or subsidiaries), or use commercial activities such as retail, conferences and events, to support their non-profit activities. The remaining 10% of respondents were wholly commercial organisations.

NON-PROFIT STATUS FIGURE 5 RESPONDENTS: 50

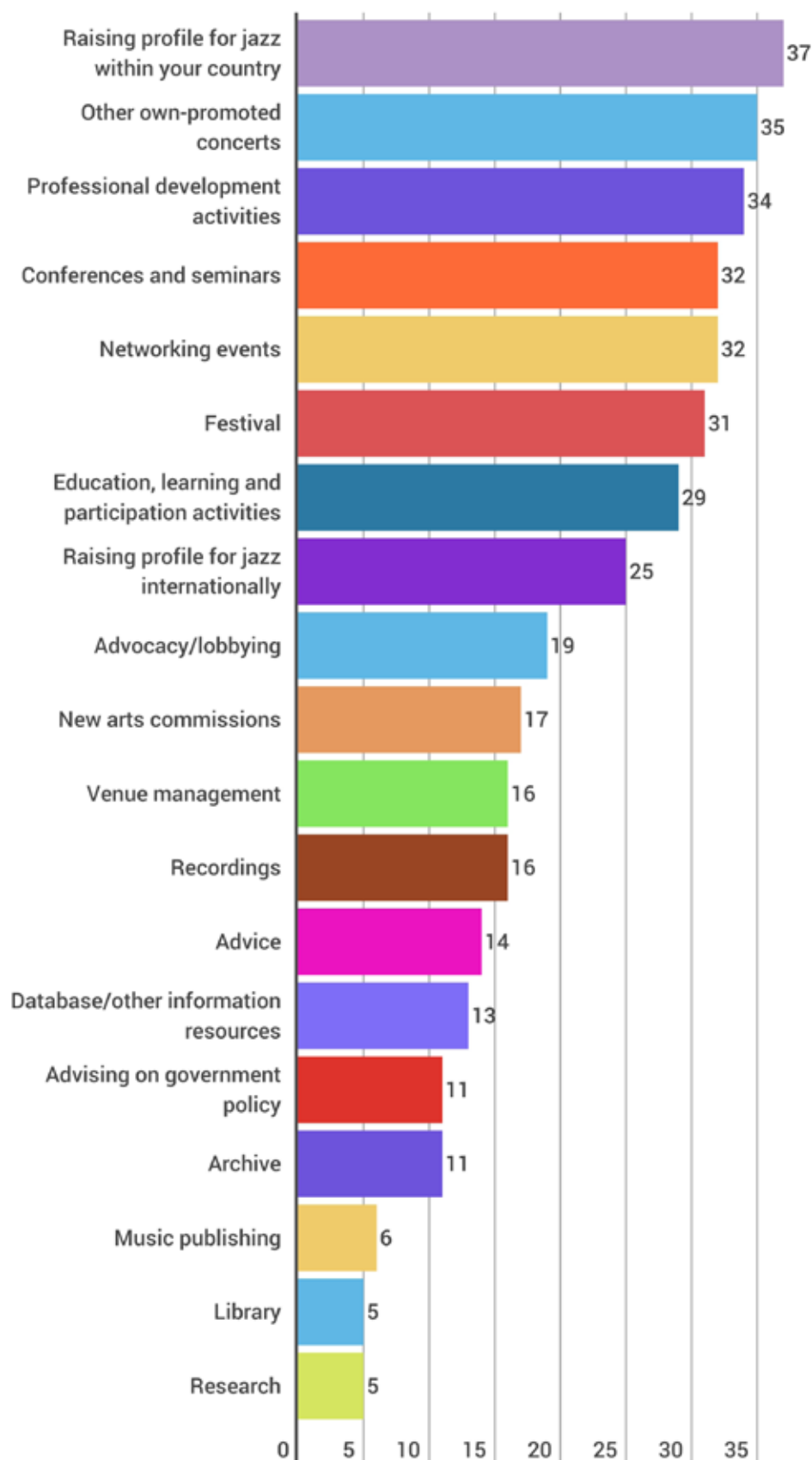


1.6 Main functions and activities

We asked all organisations to indicate the activities they undertook in 2013, across a range of 19 choices. As noted earlier,

many EJN members undertake a portfolio of activities and the responses to this question underline the diversity of activity in which they are involved:

ORGANISATIONAL ACTIVITY FIGURE 6 RESPONDENTS: 50





Loops with Bart Maris

'Joining EJN has stimulated Belgian collaborations and there's a lot of good energy to work together. We're supported by each other and that gives us strength.'

CASE STUDY:

CREATIVE PARTNERSHIPS FLANDERS ARTS INSTITUTE/ ANNAMAIJA MUSIC COMPANY

Katrien van Remortel of **FLANDERS ARTS INSTITUTE** can trace back the roots of the now established and successful Belgian Jazz Meeting to a key meeting with EJN member Paul Gompes in 2005, who was then working for Music Center the Netherlands (MCN). As van Remortel explains, she was then only relatively recently in post at the Flanders Music Centre, and Gompes' sharing of his knowledge and experience of the Dutch Jazz Meeting had a huge impact: **"Paul invited me and Rik Bevernage of De Werf as a festival and venue director, as we were both very keen on the concept of a regional jazz meeting, and as Paul was very experienced we learned a lot from him. The great thing was that Paul was very generous in sharing his experience in this concept and also the results of it, the people he invited - because he really openly shared all his information with us, it gave us a great opportunity to develop."** The initial meeting with Gompes took place in the spring, and the first Flemish Jazz Meeting followed some six months later that autumn. Bruges venue De Werf has always been a key partner in the project, providing significant resources in kind (staffing, catering, the venue spaces), and the project soon took on a new partner for the 2nd edition in 2007 - EJN. **"The**

Flemish Jazz Meeting hosted EJN's General Assembly in 2007, and I think it was the first time the GA was combined with a showcase festival, which has now become the norm."

After three successful Flemish editions, the event was expanded to be national: **"From the beginning, we wanted to make it a Belgian meeting, not just Flemish, but because of the political and financial structures it took a while. It was not easy to find a partner in Wallonia, but in 2011, we held the first Belgian Jazz Meeting in partnership with fellow EJN member Wallonie Bruxelles Musique. So we started with a Flemish edition, to promote Flemish bands abroad and network, but then it became a Belgian story and made connections within Belgium. Belgium has two communities, two languages, and borders made by media who each speak their own language. Because of these language barriers, both sides don't know that much about each other, so doing the Belgian Jazz Meeting was immediately a very fruitful thing in bringing together these two parts of the country."** Belgian Jazz Meeting is now a thriving biennial event that has in turn stimulated further collaborations. It has a growing number of partners on both sides of the border, including JazzLab Series

(now also a member of EJN) and Les Lundis d'Hortense, who have themselves developed their own collaborative touring projects working across the 'invisible wall'. On the alternate years, there is also now a biennial Belgium Jazz Forum, a conference bringing together a national conversation about the development of the scene, meaning that there are annual opportunities for key partners to share ideas, collaborate, plan new projects and help to grow the sector. The impact of this kind of working has not only led to further collaborations but also to an increased presence for Belgian jazz internationally, including through the strong Belgian presence at the key jazz trade fair, Jazzahead: **"Joining EJN and stimulating all these collaborations has meant that the Belgian delegation has become very big - there were 45 of us at Jazzahead this year, and it means that we not only get to know each other better but also allows us to exchange our networks with each other. Because we've done all these collaborations, at Jazzahead we all come together and you feel like there's a lot of good energy to work together, and everybody feels comfortable and confident. We're supported by each other and that gives us strength."** There is clear evidence of the impact this has at

an artistic level, and van Remortel cites the circulation of De Beren Gieren as one good example, among many, of the EJM network in practice: **"After appearing at the Belgian Jazz Meeting in 2011, De Beren Gieren were picked up to play at 12 Points in Porto, and that led to further bookings and a collaboration with Portuguese trumpeter Susana Santos Silva, in a residence instigated by EJM member Wim Wabbes. Susana is recorded by Clean Feed records of Portugal, who are in turn connected to Bogdan Benigar's festival in Ljubljana - another EJM member - so it's like a stone being dropped into water and it just ripples."**

ANNAMAIJA MUSIC COMPANY is one of the newer members of EJM, having joined as a member after the company was founded in 2011, but its founder Annamaija Saarela has long been a key member of the EJM family. A former president of EJM, her background means she was ideally placed to set up her own business to develop the music that she loves: **"My background is very strongly in the festival field, having been executive director of Tampere Jazz Happening and also for UMO, with their own club and festival, and after that for the Finnish Musicians Union. So I've been working in this field for more than 20 years and I needed all this experience before setting up my own company, to use my experience in how to make new connections for the musicians, develop international collaborations and so on."** Saarela has been keen to distinguish the role that she and her company plays from the more widely recognised and understood role of the music agent, and stresses the importance she places on working closely with musicians to support their development at all levels: **"My company is not an agency - although one of our goals is to find agencies for our musicians - and we often support mid-career musicians in their development**

and to undertake special projects. We work closely with musicians to create international collaborations, as well as delivering project-based work for partners including Music Finland."

The independent structure and set-up of AMC, unique within the EJM membership, enables a large amount of creative freedom and flexibility, which means the company can partner with politically funded structures, such as the Finnish Jazz Federation, to develop and deliver high impact projects. One good example is the Music Finland UK project, a two year programme in 2012 - 2013 designed to raise the profile of Finnish improvised music in this key market. London Jazz Festival - also an EJM member through its parent company Serious - was a crucial partner in this project, as Saarela explains: **"London Jazz Festival is an important gateway to the international market, which is why musicians are very interested in performing in London. Equally, it's extremely hard to get gigs in London because the UK's own market is so strong, and there's a lot of music going on."** Two Finnish groups performed in both years at the festival and succeeded in getting signed for the well-regarded UK based Edition Records, including AMC clients Oddarrang. The sextet's drummer and composer Olavi Louhivuori is emphatic about the success of the band's work with AMC: **"Annamaija has always been an incredibly important person for us in all possible ways - when the band started, she was working at UMO and booked the band then, and now she has found us a great German agent, Handshake Booking. As a musician these days, you have to do everything yourself so I needed to find someone**

who could do the stuff I have to do but I didn't know how to do, for example, grants and funding, looking for bookers around Europe - and that's been a complete success. I think the most important thing in a manager is that they know the right people, and that's why Annamaija's worth her weight in gold - she knows everyone in the European jazz scene." The focused satisfaction of supporting emerging bands like Oddarrang is complemented by AMC's broader impact on the sector, exemplified by the long term funding now in place for improvised creative music from the Ministry of Culture through MES (The Finnish Music Foundation), whose funding to the sector has continued to increase despite cuts elsewhere. This specific support for freelance musicians was itself the result of the VAKA research project overseen by Saarela whilst at the Finnish Musicians Union. In 2015, Saarela was the first non-musician to receive the Finnish Musicians' Association Recognition Award for services to music and it's in keeping with her passion for the music which drives all her activities: **"The reason I do my job is to bring the music to people, because I love the music, I love improvised, creative music. I think that is exactly the same reason festival or club promoters are involved - to bring this great music to the people - but this is just another way to do it."**



HUMAN RESOURCES: STAFF AND VOLUNTEERS

2

2.1 Staff

The questionnaire asked respondents to quantify their organisations' personnel in terms of Full Time Equivalents, or FTEs. FTEs are a standard way of quantifying the total hours worked by an organisation's staff and enable researchers to represent accurately the totality of an organisation's workforce, taking into account full time, part time and temporary staff. Many EJM members have a mixture of different types of staff and the festivals' sector in particular relies upon a large influx of seasonal or casual staff whose capacity can be difficult to quantify in other ways.

Together, 59 respondents employed 1.066,42 FTE in 2013. If we extrapolate this to the full membership⁴, we can estimate that **EJM members employed 1.337 FTE staff in 2013.**

1.337

EJM staff numbers



2.2 Volunteers

Together, 44 respondents had 228 voluntary board members and an additional 2.117 volunteers, giving 13.964 volunteer days in 2013. On average these days were split so that 52% of volunteer time was spent

on professional or managerial tasks, and the remaining 48% was spent on manual or unskilled tasks. If we extrapolate this to the full membership, we can estimate that **EJM members were supported by 489 voluntary board members and an additional 3.479 volunteers, giving 22.585 days of voluntary support**⁵. Based on the average split of time between professional and manual tasks, we can estimate that **the value of volunteer time to the EJM membership in 2013 was at least €965.000**⁶.

2.3 Student internships

In addition, 48,31 FTE of student trainees or internships in total were used by 44 respondent organisations in 2013, although nearly half of respondents (20) made no use of internships or trainees at all. If we extrapolate this to the full membership, we can estimate that **99,2 FTE of student internships were used by EJM members in 2013.**

2.4 Gender

The gender balance across EJM member organisations in 2013 was the same, on average, as the balance in 2009: **55% men to 45% women.**

⁴ The methodology used for extrapolation throughout the report, unless stated otherwise, is 10% trimmed mean. This method enables both a more realistic measure of central tendency and also includes the outliers which may contribute significantly to the total - see the methodology section for more details.

⁵ The figures for volunteering in 2013 are lower than in 2009, with the exception of board volunteer support, which is broadly in line with 2009. The same methodology - 10% trimmed mean - has been used for extrapolation in both years so it is difficult to evaluate whether the differences are due to a changing use of volunteers amongst the membership, unreliable data, or a shift in the overall composition of the EJM membership.

⁶ In calculating the value of volunteer time, as in the original Strength in Numbers report, the value of the 48% of manual time was calculated using the average minimum wage across 29 EU members in 2013 (see Eurostat's Minimum Wages for January 2013, code tps00155). In order to calculate the value of the 52% of professional time, we used 2011 data (the most recent available) for average earnings in the arts, entertainment recreation sector in 14 EU countries taken from Eurostat's NACE Rev.2 figures. Given this, the figures are likely to be conservative.



Budapest Music Center

CASE STUDY: GETTING TO KNOW YOU: TWO APPROACHES TO PRIVATE INVESTMENT IN THE ARTS *BUDAPEST MUSIC CENTER/ BOHEMIA JAZZ FEST*

György Wallner works in international relations for **BUDAPEST MUSIC CENTER (BMC)**, the successful host of the 2015 European Jazz Conference and a longstanding member of EJN. This multi-faceted organisation runs a venue, music information centre, library and its own record label, as well as producing a number of high profile events and festivals. Founded in 1996 by trombone player and academy professor László Göz, the initial drive to set up the organisation was to fill a vacuum opened up in the Third Republic era, as Wallner explains: **"After the changes in 1990, there was nowhere a foreign promoter or venue could get knowledge about what was going on in Hungary - the groups and the musicians, whether jazz or classical. It started as very much a one-man band at the beginning, with a website giving data on artists, composers and their works, and soon developed into the creation of the record label, in order to better promote Hungarian music."** Income from the early commercial outputs of the BMC label was used to fund less commercial activities, and this approach to creating a financially balanced and self-sustaining organisation has been

consistent throughout BMC's activities: **"It's been really important to BMC from the beginning that László has built a business that enables the funding of non-profit cultural activities through more commercial activities, so some of the early releases on the label were film scores, which in turn supported recordings like Peter Eötvös's Atlantis in 1997, which was a great success, and encouraged us to look at international distribution."** The idea of BMC developing its own venue - alongside its burgeoning event promotions activities, including the Budapest Jazz Festival - started in 2000, and came a step closer to fruition in 2004, when the company found an ex-municipal building scheduled for demolition. As Wallner explains, this site went on to become the new home for BMC: **"It took a long time, and with a postponement from 2008 - 2011 because of the global banking crisis, but in March 2013 the new venue opened and since then, things have been much easier for BMC as the building has opened up many possibilities. The building was planned so that it is good for any kind of cultural activity, but within minutes**

it can be changed to host business events - conferences, meetings of shareholders or whatever, and it has lots of different sized rooms and a full range of facilities. We have designed the space so that it can be adjusted very precisely to the requirements of the customer and we can offer very good service packages because we have everything under one roof, and work to be better in service and price than our competitors. Our business activities are close to our cultural activities, and because sometimes business events need a cultural programme, we can help." BMC's track record in event promotion means that it is also contracted to run large-scale external events for pop and rock producers for business partners like T-Mobile. Wallner is clear about the reasons for BMC working in this way: **"For us, this part is very important: the whole part of making money is so that we are able to run our main activities, our cultural activities. That is very hard to believe sometimes for people - some people do it for the profit. Our profit is that we can do the activities that we want to do."** BMC has now built strong relationships

with a wide range of business partners, and develops bespoke agreements for their co-operations, which include two-way responsibilities and in-kind support where appropriate. The network BMC has built is of paramount importance, founded on strong relationships with big, well-established companies who know and trust BMC's work. In addition to these strong business partnerships, since 2011 BMC has received regular state support for its public activities, accounting for 20% - 25% of its annual budget, meaning that it matches each €1 of public subsidy with €3 - €4 of earned income. In turn, this business model enables BMC to develop non-profit activities that are the passion of the organisation, including the beautiful, free, public access library and information centre resource housed in Budapest: **"We are very proud of the music information centre and library because these books and scores, and everything else you see there, existed before but would have been lost before today without BMC. There are many special things in the library, including unpublished scores donated by composers to the state over decades. We now hold these items in storage for the state, so it's quite unique. They were never available but now we have them all digitally catalogued, so they can be searched and accessed online throughout the world."**

Anna Linka, the Director of Development at **BOHEMIA JAZZ FEST**, is passionate about the role this free multi-town event plays in the Czech Republic: **"The Festival grew out of a community service**

'Strong business partnerships enable BMC to develop non-profit activities that are their passion'

idea - to help the country after the revolution as people could not afford to go to concerts or see good music. We also wanted to take this opportunity to really change the way Czech people perceived jazz. Today the Festival has really become an international event and a true cultural exchange between Czech and international audiences and musicians alike." For the first edition of the Festival, in 2006, the events took place over one week in three locations, including Prague, and the 2016 event will be across nine days in seven locations. As an event with no box office income, the Festival derives a considerable proportion of its income - some 40% - from private supporters and sponsors and Linka uses the multi-location aspect of the event to drive giving: **"We get support from each town or region that the Festival is based in, and in order to get each location excited about their programme, each programme has to be a bit different. Programming also depends on the funding in each town,**

although sometimes the Festival brings towns together by sharing programming. Many corporations love that we are not just in Prague because of the nature of their own work - for example, we are supported by a bank who is always looking for events to support across multiple regions, not just in the capital centre, and supporting the Festival accomplishes just that." Building and retaining strong relationships with sponsors is key to the Festival's fundraising success in this competitive area: **"When you work in the arts, whether you like it or not, you're bound to have to fundraise. A lot of people do it and don't really have a system for it - they're swinging it. We believe in doing it right - I love it and I live for what I do. A great new corporate sponsorship doesn't just happen - you have to work it from the very beginning by going in on a smaller scale and going in with a specific**

Bohemia Jazz Fest



request for a specific level of support, and you can build from there. You need to work with your sponsors, be friends with your sponsors, listen to them and don't think all the time that the sponsor is super excited about your project, because they have a life too - I think that's a very common mistake to make. I have Excel sheets on all my sponsors, I read their financial statements, understand what else they're supporting so that I'm in control, and I live and breathe the job."

Managing relationships through change is also critical, as personnel changes for sponsors or stakeholders can have a large impact on organisational relationships, and Linka believes the key to managing these changes - including 8 ministers of culture during the Festival's 10 years - is to be a step ahead and to be prepared. Thinking from the sponsor's perspective and really understanding what the benefits are to their involvement are fundamental: **"We have a pretty big audience coming to our events, almost 100.000 people, as**

well as a high number of impressions from media coverage. An article in the Wall Street Journal helped to boost our media impression count to almost 17 million last year, so that's of huge interest to our sponsors. The Ministry for Regional Development loves this coverage, and for all our supporters, it's a matching game in how to talk the same language - you have to really understand what the company is about before you send in your report, and really know what they want to hear. What is it they need to check off? That is the magic in listening: if you listen to what your sponsors and partners are saying, you will know what their key words are, and if you're hitting them in your summary report, everyone will be incredibly happy. If they're not happy it's because your report has placed the burden on them to align their goals and key terms to your work - people want it easy so don't make it difficult."



Bohemia Jazz Fest



FINANCES 3.1 Total income

3

The total income in 2013 for the 54 organisations submitting data was €109,6m, giving an average income of €2 million or a more representative median income of €726.000⁷. If we extrapolate this to the full membership, we can estimate that **the total income for EJM members in 2013 was €167 million⁸**. In total, 45 respondents generated €21,5 million in ticket sales in 2013. If we extrapolate this to the full membership, we can estimate that **EJM members generated €30,2 million in ticket sales in 2013**.

In total, 45 respondents received investment of €42 million from public funding in 2013, including national, regional and local government, the EU, national arts councils and other public funders. If we extrapolate this to the full membership, **we can estimate that EJM**

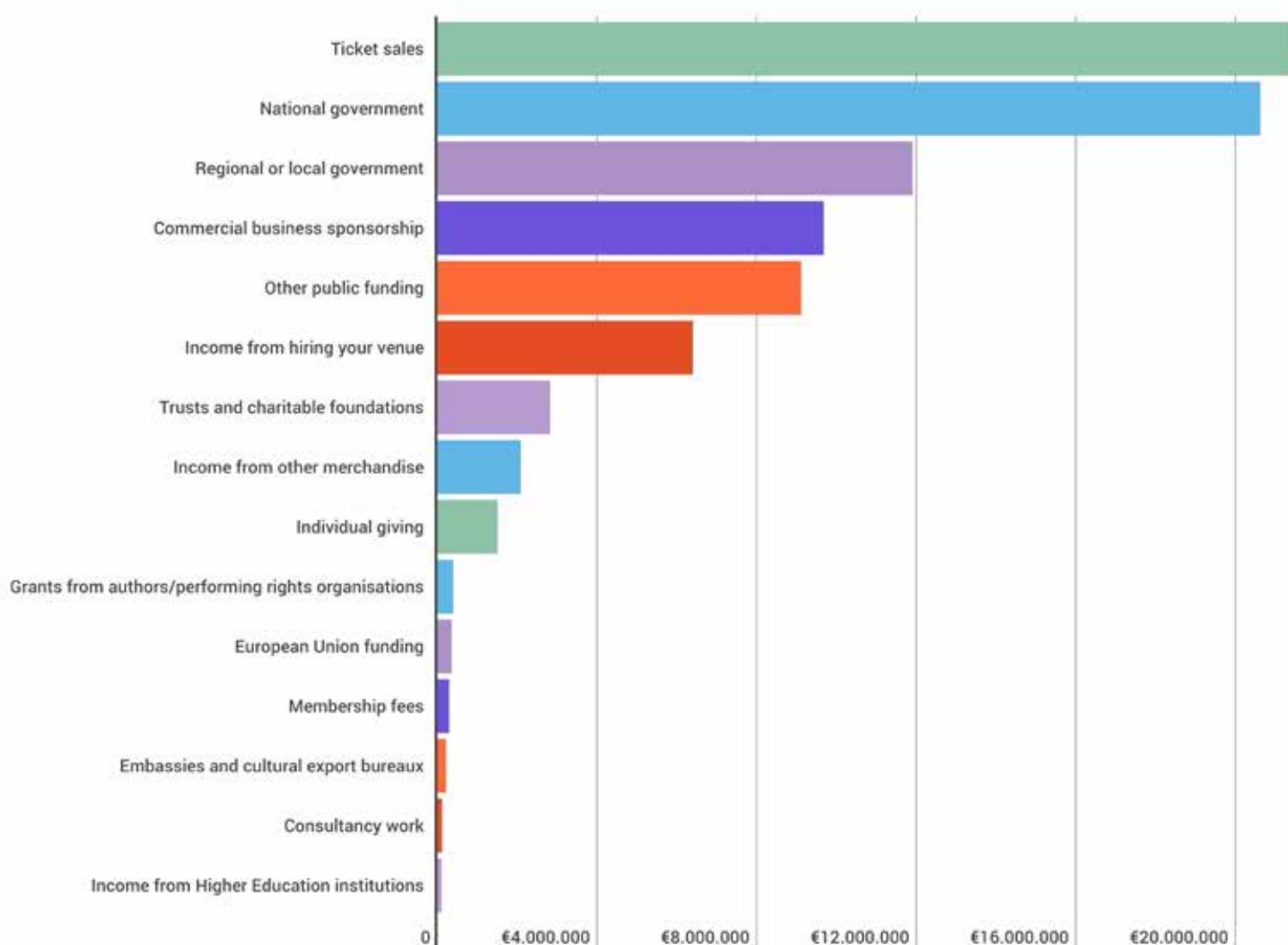
members generated €71,7 million in public funding investment in 2013.

In total, 45 respondents generated €9,7 million in commercial business sponsorship in 2013. If we extrapolate this to the full membership, we can estimate that **EJM members generated €12,8 million** in commercial business sponsorship in 2013.

3.2 Income by category

As previously, we asked EJM members to supply figures for their total income in the 2013 financial year, and then to give data for a number of agreed categories. We were not asking for a full breakdown of figures across every income source but simply to identify how important agreed key funding streams were to members' income. This table shows the full breakdown of income by category, showing proportional size of each income stream:

INCOME BY CATEGORY FIGURE 7 RESPONDENTS: 45



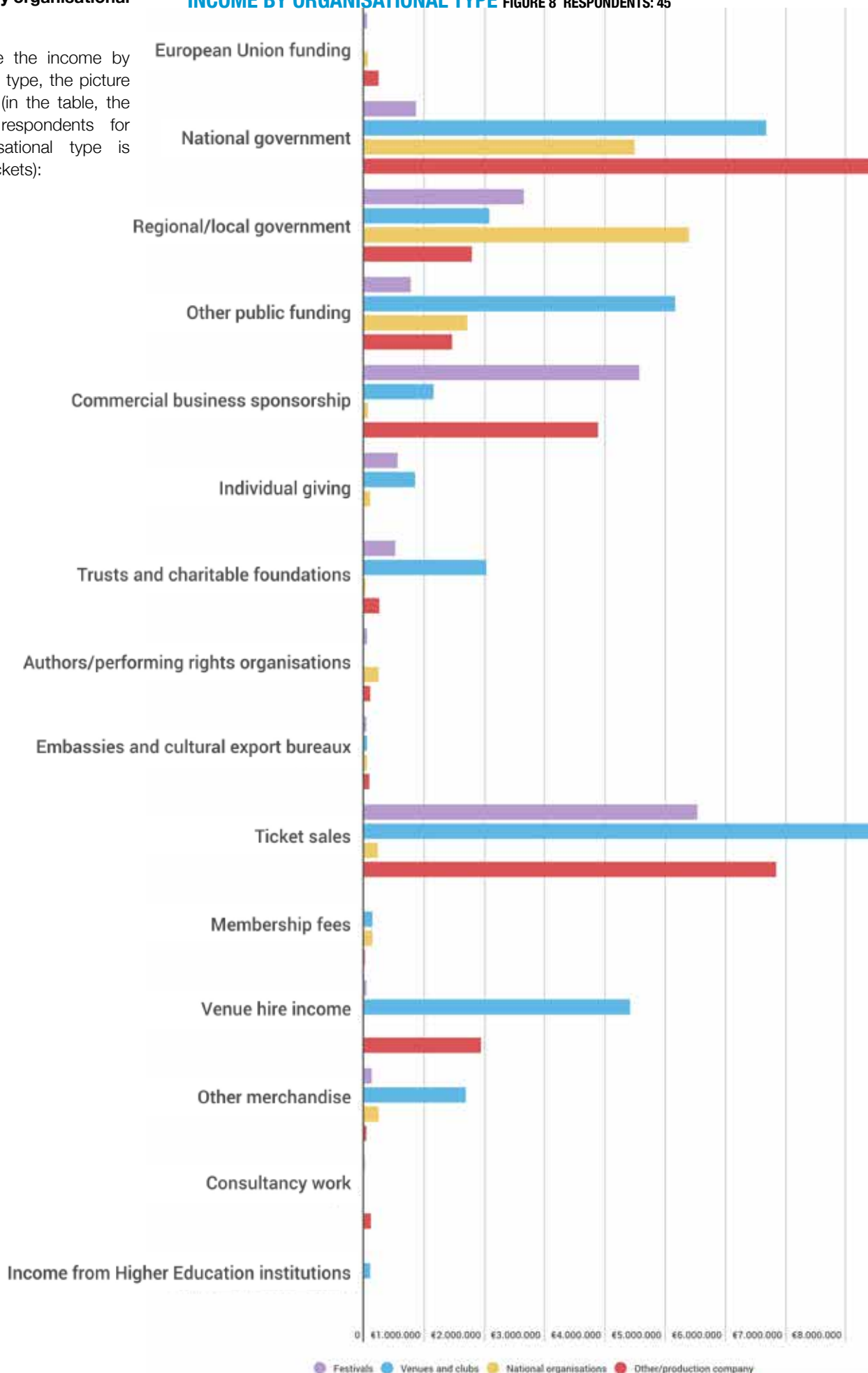
⁷ This compares to a median income of €637.000 in 2009.

⁸ All the extrapolations in this section are based on a trimmed mean of 10% and the same extrapolation methodology as used previously.

3.3 Income by organisational type

If we analyse the income by organisational type, the picture is as follows (in the table, the number of respondents for each organisational type is shown in brackets):

INCOME BY ORGANISATIONAL TYPE FIGURE 8 RESPONDENTS: 45



INCOME	Clubs and venues (7)	Festivals (13)	National organisations (15)	Other/production company (10)
European Union funding	0	53.963	66.218	234.899
National government	6.680.204	865.091	4.487.373	8.594.105
Regional or local government	2.078.576	2.646.581	5.399.130	1.788.501
Other public funding	5.160.419	779.489	1.717.394	1.461.478
Commercial business sponsorship	1.161.034	4.568.908	69.547	3.883.288
Individual giving	851.336	562.629	96.027	800
Trusts and charitable foundations	2.034.480	516.717	27	249.312
Grants from authors/performing rights organisations	0	53.156	239.143	102.389
Embassies and cultural export bureaux	51.24	32.496	45.555	83.998
Ticket sales	8.872.117	5.537.983	231.012	6.838.268
Membership fees	145.783	640	135.871	13.192
Income from hiring your venue	4.418.514	36.057	0	1.948.201
Income from other merchandise	1.688.555	127.832	236.455	33.091
Consultancy work	0	10	0	109.592
Income from Higher Education institutions	106.442	0	0	0

As might be expected, the balance of income from different sources reflects the organisational type, with national organisations relying more heavily on public subsidy and less on earned income.

3.4 In-kind support

In addition to the cash support received by members, we asked them to quantify the value of the support in-kind they received from other organisations, including the value of volunteer time, in-kind support through venue hire, media support or other in-kind sponsorship. The total value of the support given to 32 respondents was €3,08 million. If we extrapolate this to the full membership, we can estimate that **EJN members leveraged a total of €4,3 million in support in-kind in 2013.**

3.5 Income over time

The original Strength in Numbers research collected data on the 2009 financial year but also asked for income from the 2010 financial year. This second questionnaire asked for income from 2011, 2012 and 2014 (even if estimated) in addition to the core data from the 2013 financial year. Overall, this gives a helpful overview of the relative financial performance of the sector.

In 2009, the total actual income for 58 organisations was €116,3 million, or median income of €637.000.

In 2010, the total actual income for 50 organisations⁹ was €99,2 million, or median income of €572.000.

In 2011, the total actual income for 38 organisations was €73,2 million, or median income of €640.000.

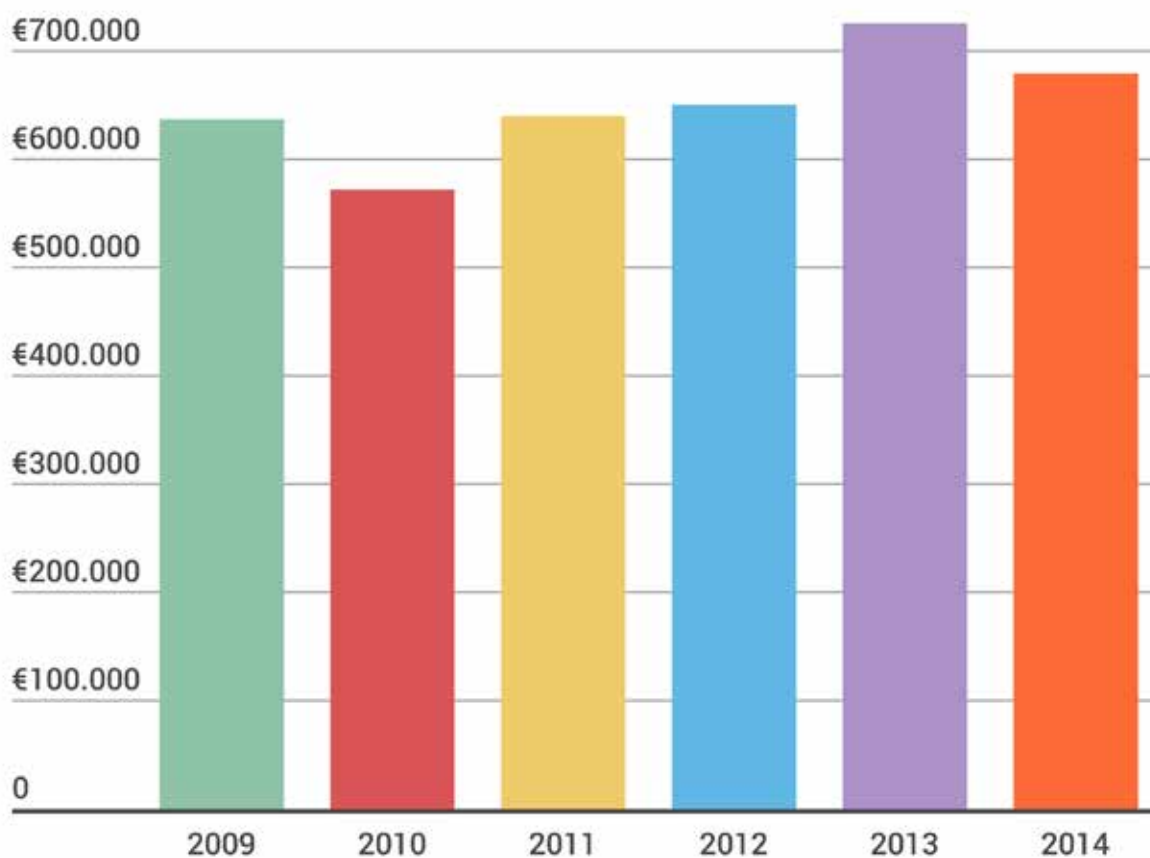
In 2012, the total actual income for 40 organisations was €72,2 million, or median income of €650.000.

In 2013, as noted above, the total actual income for 58 organisations was €109,6 million, or median income of €726.000.

In 2014, the total actual income for 47 organisations¹⁰ was €76,06 million, or median income of €679.000.

Because of the fluctuations of respondent rate, tracking the median income over the 6 years gives a more holistic picture of the changes to members' income during the period¹¹:

MEDIAN INCOME OVER TIME FIGURE 9



⁹ Because of the timing of the questionnaire in relation to the financial year end, 13 out of 50 respondents (or 26%) gave figures for income which were unverified and therefore not yet final for the 2010 financial year for the original Strength in Numbers report.

¹⁰ Because of the timing of the questionnaire in relation to the financial year end, 4 out of 47 respondents (or 9%) gave figures for income for the 2014 financial year which

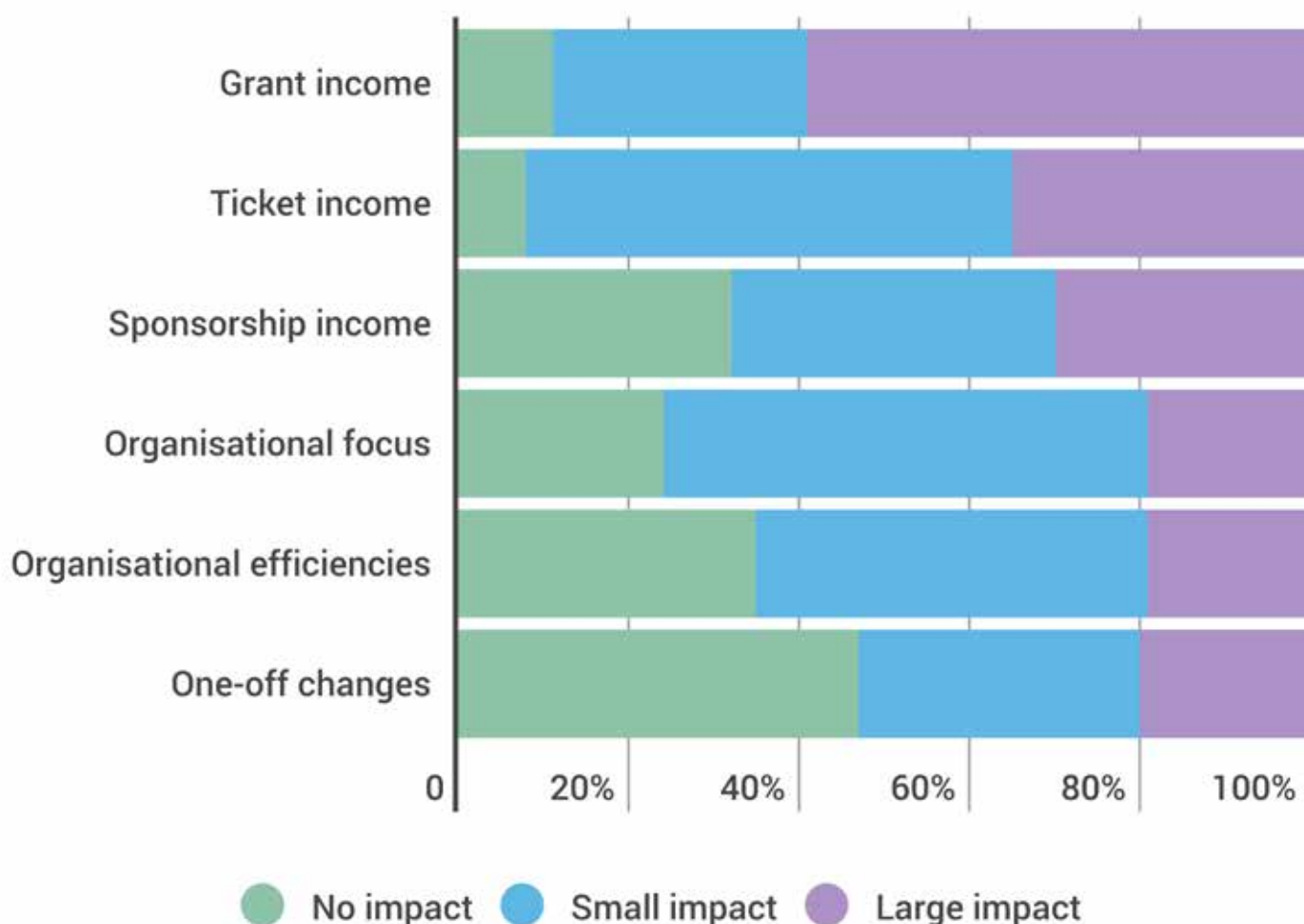
were unverified and therefore not yet final for this report.

¹¹ See section 6 for further discussion and analysis of the comparative data from Strength in Numbers and Strength in Numbers 2.

3.6 Reasons for income change

We asked respondents to look at the changes in their organisation's income from 2011 - 2014 and to indicate how much impact a range of factors had on their income during this period, with options of 'no impact', 'small impact', 'large impact' and not applicable¹².

REASONS FOR INCOME CHANGE 2011 - 2014 FIGURE 10 RESPONDENTS: 46



As might be expected, fluctuations in grant income had the largest impact on overall income, with 57% of respondents reporting a large impact on their income due to this factor from 2011 - 2014.

3.7 Total expenditure

In total, 52 respondents spent €112,2 million in 2013, an average of €2,2 million or a more representative median of €833.000. If we extrapolate this to the full membership, we can estimate that **the total expenditure for EJM members in 2013 was €176,2 million**¹³.

¹² The chart does not show 'not applicable' responses. Respondents were given staffing, communications or finance changes as examples of changes in organisational efficiencies. One-off changes were defined as a specific organisational change which was unlikely to happen again.

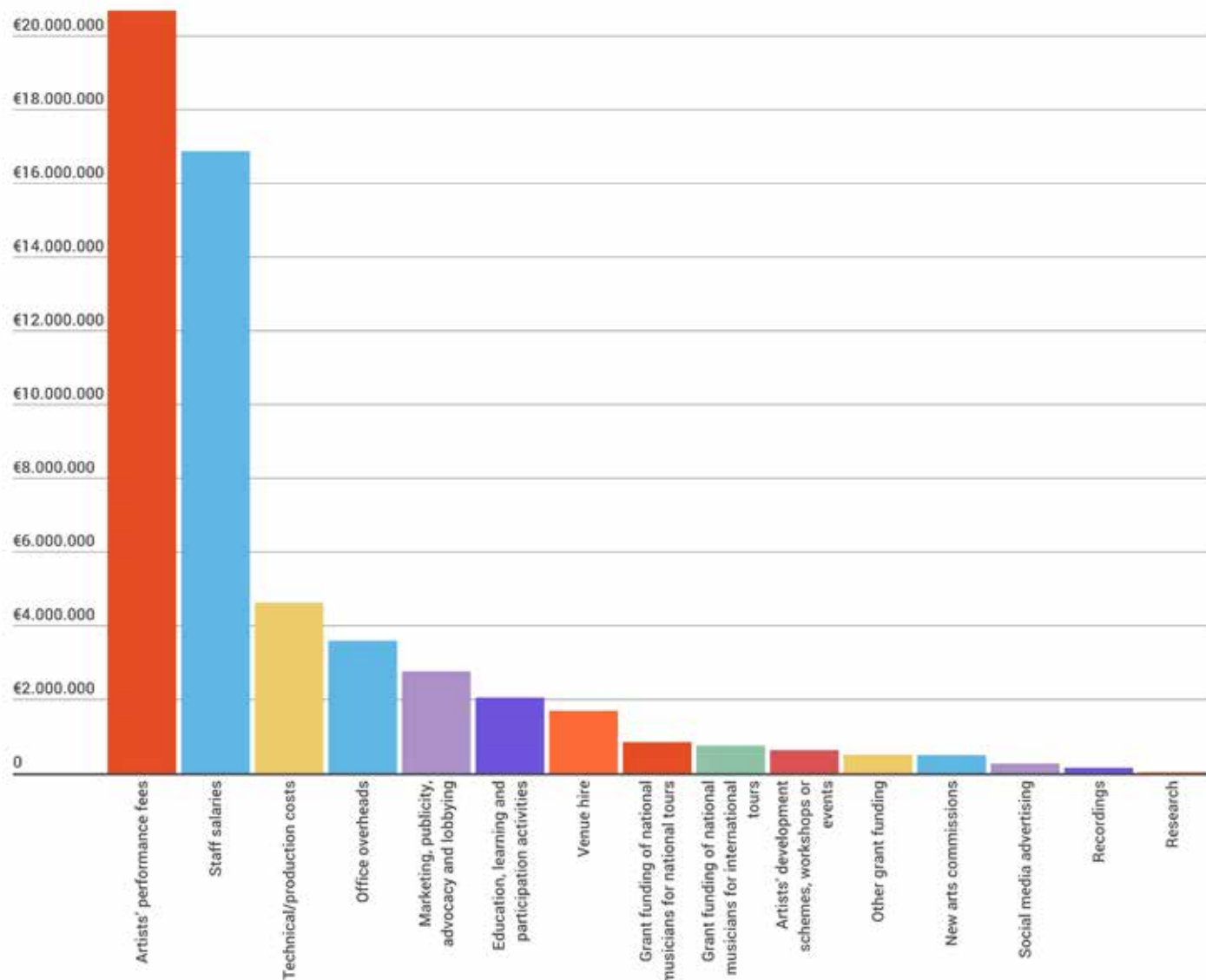
¹³ All the extrapolations in this section are based on a trimmed mean of 10% and the same extrapolation methodology as used previously.

3.8 Expenditure by category

As previously, we asked EJJN members to supply figures for their total expenditure in the 2013 financial year, and then to give data for a number of agreed categories. We were not asking for a full breakdown

of figures across every expenditure source but simply to identify how important agreed key areas of expenditure were. This table shows the full breakdown of expenditure by category, showing proportional size of each area of expenditure:

EXPENDITURE BY CATEGORY FIGURE 11 RESPONDENTS: 49

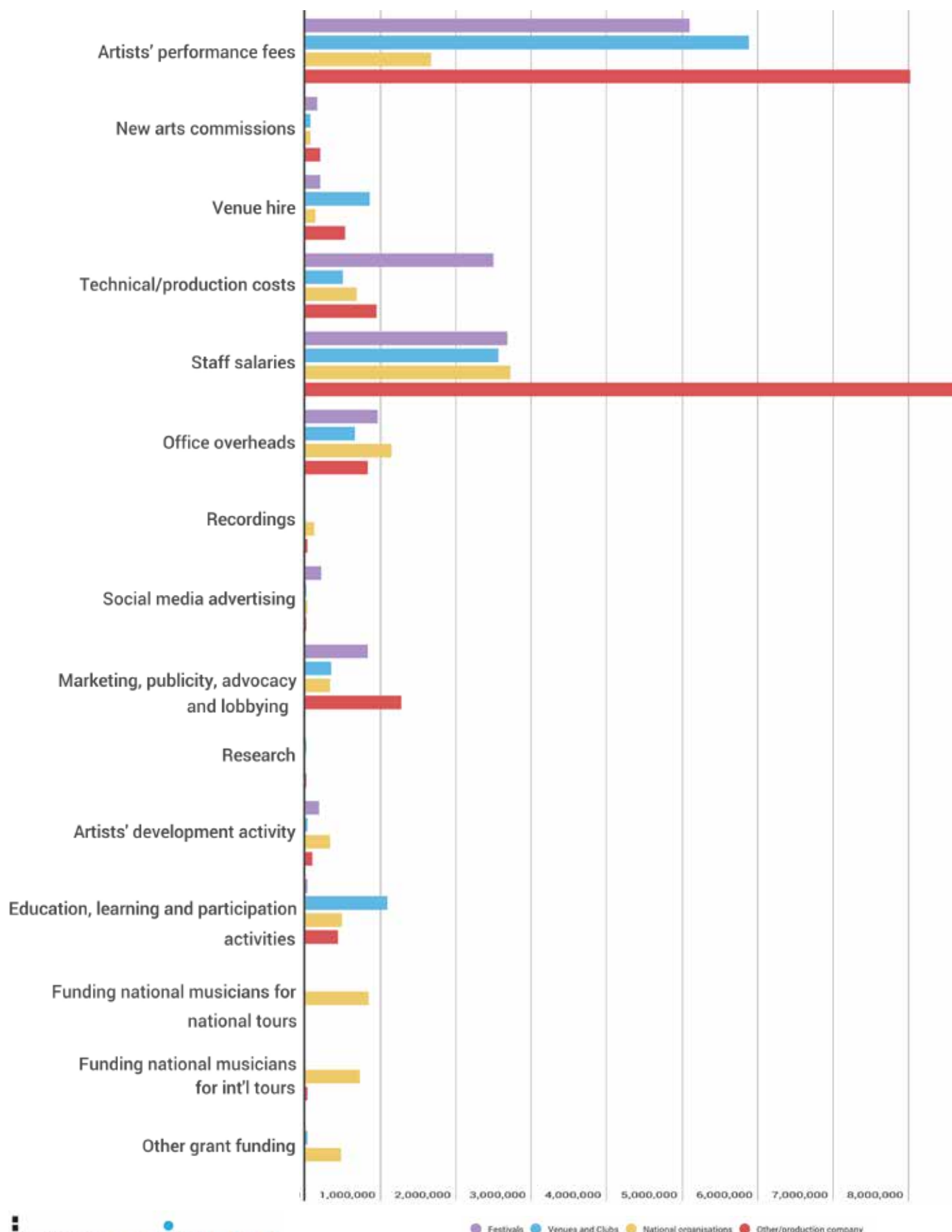


3.9 Expenditure by organisational type

If we analyse the income by organisational type, the picture is as follows (in the table,

the number of respondents for each organisational type is shown in brackets):

EXPENDITURE BY ORGANISATIONAL TYPE FIGURE 12 RESPONDENTS: 49



EXPENDITURE	Clubs and venues (7)	Festivals (17)	National organisations (14)	Other/production company (11)
Artists' performance fees	5.886.241	5.102.950	1.675.143	8.022.893
New arts commissions	68.903	160.835	59.33	200.574
Venue hire	854	190.927	126.147	519.181
Technical/production costs	498.013	2.500.550	687.342	940.697
Staff salaries	2.565.936	2.686.391	2.725.073	8.895.960
Office overheads	652.16	965.753	1.145.262	830.193
Recordings	0	0	115.446	30.496
Social media advertising	12.5	206.368	25.7	15.5
Marketing, publicity, advocacy and lobbying	335.497	831.723	323.871	1.272.833
Research	10	2	4.323	7
Artists' development activity	25.088	181.043	323.17	92.24
Education, learning and participation activities	1.095.921	27.77	489.155	435.5
Funding national musicians for national tours	0	0	840.066	0
Funding national musicians for international tours	0	0	721.231	28.545
Other grant funding	25	0	476.24	0

3.10 Expenditure on artists

49 respondents provided data on their expenditure on artists in 2013. Together, these organisations spent €20,7 million on artists' performance fees for their own-promoted concerts and events (including taxes) and €490.000 on commissioning new works from artists. If we extrapolate this to the full membership, we can estimate that **the total expenditure on artists by EJM members in 2013 was €32,4 million**¹⁴.

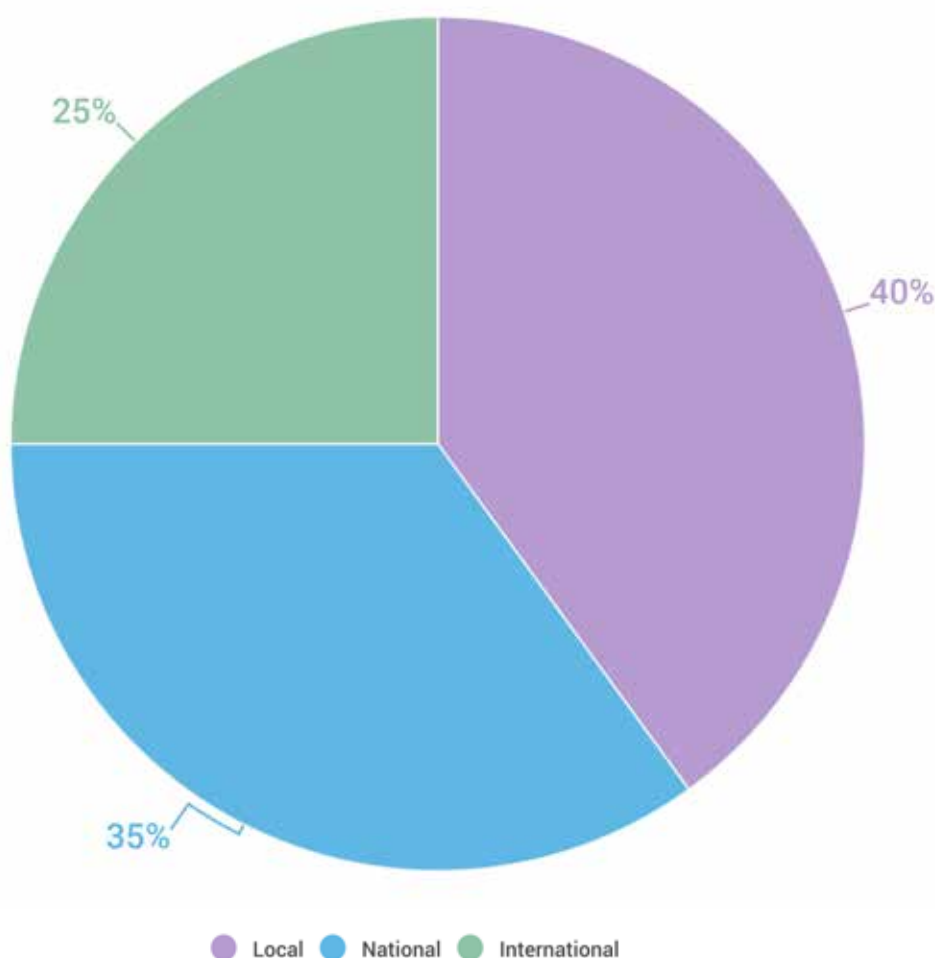
Works commissioned by EJM members in 2013 included musical works for a variety

of ensembles, including orchestras, big bands and choirs, as well as a composition competition with 6 grantees, and an innovative online improvisation tool, Dfscore, to facilitate group improvisation.

3.11 Local expenditure

We asked respondents to estimate where their money was spent in 2013, and to give proportions of their total expenditure spent internationally, nationally and locally. The results from 35 respondents were as follows:

WHERE THE MONEY IS SPENT FIGURE 13



¹⁴ We have not compared artists' expenditure in 2013 with that of members in 2009, as the categories for the 2013 questionnaire were somewhat simplified, following feedback and discussion with members and the steering group, and some categories for artists' expenditure (i.e. subsistence payments and other payments to artists) were excluded from the list this time. It is, however, likely that these figures for payments to artists are conservative as many other expenditure items will benefit artists financially, although less directly (e.g. expenditure on professional development schemes for artists will have financial benefits to artists, as will funding of musicians' tours, but the direct payments to artists in both these activities is not consistent or comparable between organisations).

Based on the total estimated expenditure in 2013, we can estimate that **EJN members spent €69,3 million in their local economies, €61,9 million nationally and €45 million internationally.**

3.12 Economic impact

Based on the data collected in the research, we are able to make certain statements about the economic impact of the EJN membership. Economic impact is usually calculated as the result of three levels of impact: direct impact (the direct effects of direct spending, this case directly by EJN members); indirect spending (or indirect impact - this may be spending by the businesses that provide EJN members with goods and services - for example, a lighting company) and induced impact (caused, for example, by spending of the employees of the lighting company, or the employees or other businesses that provide EJN members with their goods and services).

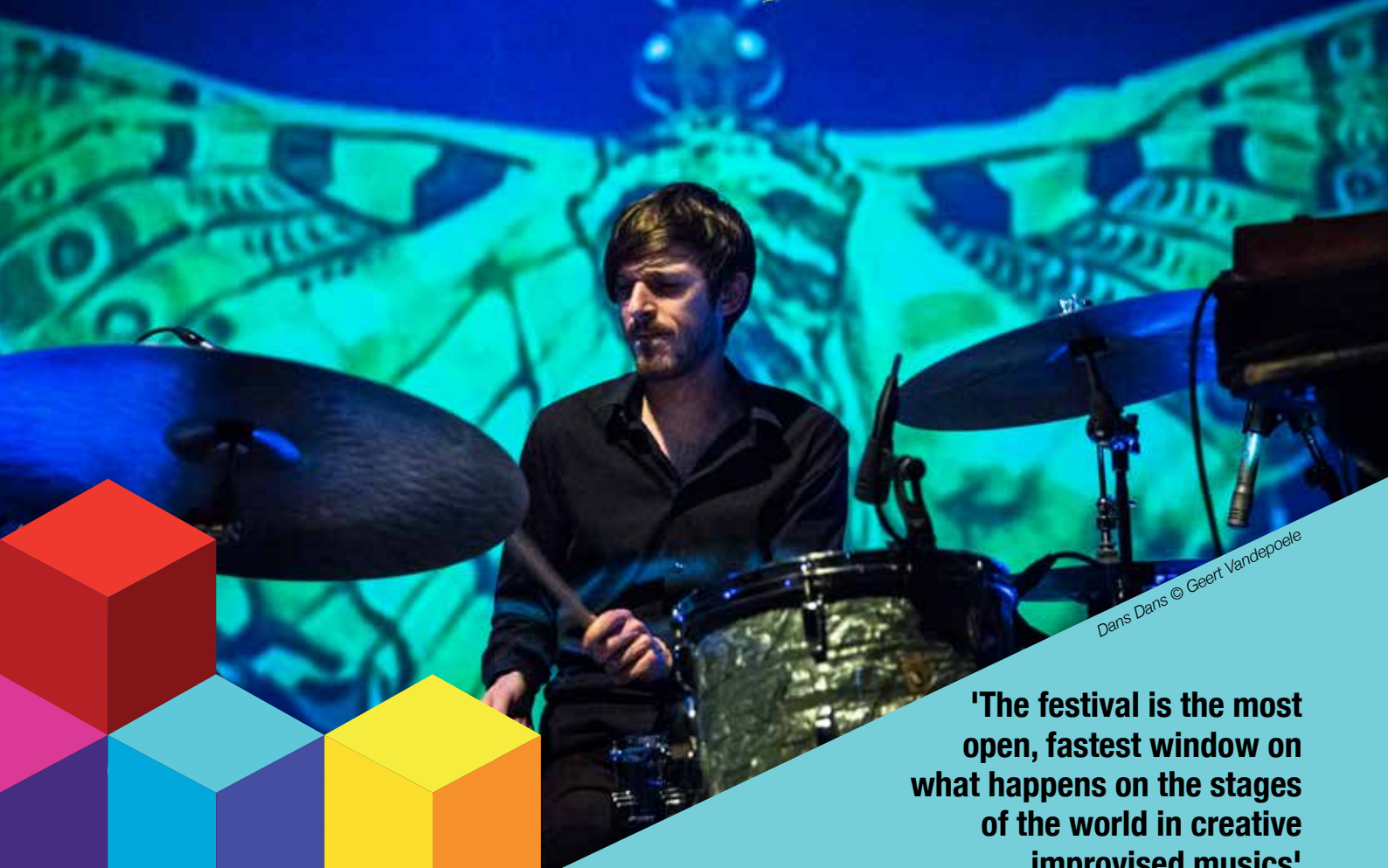
Based on data we have collected about direct spending by EJN members, we can estimate the indirect and induced impacts of their total expenditure by applying a multiplier¹⁵. We can estimate that **the total**

economic impact of EJN members direct spending in 2013 was €439 million¹⁶. This does not represent the total economic impact of EJN members' activities in 2013 as, crucially and as previously, we do not have data from EJN's audiences to demonstrate what impact their spending has on members' local economies. In other studies of similar organisations, the impact of audience expenditure on local economics is significant in comparison to the impact of direct expenditure by members. For example, as cited previously, in the Association of Folk Organisers influential report 'The impact of folk festivals', of the festivals' total economic impact of £82,2 million, £76,99 million (or 94%) was the result of visitor spending and just £5,21 million (or 6%) was the result of festivals' own spending.

Research undertaken by Tampere Region Festivals in Finland, of which Tampere Jazz Happening is an EJN member, calculated that in 2013, festivals and attractions received 2,5 million visitors, contributing €253 million to the local economy, including €139,3 million from outside the Tampere region.

¹⁵ Choosing a multiplier in any circumstance is contentious and, as discussed in the methodology section above, it would be virtually impossible to calculate a robust figure for indirect and induced impacts in this case based on one multiplier, as the multipliers which need to be applied relate to local conditions, which obviously vary hugely from member to member. For example, the UK's New Economics Foundation recommends a tool called LM3 (or Local Multiplier 3) to calculate appropriate multipliers for use in local settings, based on their individual economic conditions. These are based on how money flows in an individual economy. See also Michelle Reeves' 'Measuring the economic and social impact of the arts: a review' (London, Arts Council England, 2002).

¹⁶ The multiplier used to measure the impact of expenditure on operations is 2,49, as in the first Strength in Numbers study, to ensure methodological consistency between the two studies. As cited in the original study, this multiplier has been widely used in a variety of arts and cultural contexts, including a number of influential festivals studies. The multiplier has been applied to the total estimated expenditure of EJN members, and assumes its total expenditure has been allocated to goods and services, which is reasonable based on the data we have collected.



Dans Dans © Geert Vandepoel

'The festival is the most open, fastest window on what happens on the stages of the world in creative improvised musics'

CASE STUDY:

NEW PROGRAMMING: MUSIC AT THE CROSSROADS MOERS FESTIVAL/HANDELSBEURS

Reiner Michalke, artistic director of Germany's **MOERS FESTIVAL**, received the EJA award for adventurous programming in 2015 and speaks passionately about the history of the festival he has curated for 11 years: **"This is the only festival of its type in Europe - when it started in 1972, it focused on free improvised music, and my predecessor invited the searchers who were on the edge of creative music, never the mainstream of the music. The festival was always presenting the edge, but with a very big openness to pop music, rock music and world music but always with a reference to improvised music and a very big respect to jazz music and its history. However, it was never presented as jazz - it was new jazz. That was and still is the idea of Moers: not to look at what is in the middle, but what is on the outside. The ones who are avant-garde, who are nervous, searching, looking, never standing in the same place. This is still the core of the festival."** The festival underwent a big

change in 2014 when it moved from being an outdoor tented festival surrounded by a large crowd of people to celebrate 'the jazz' but not to listen to the music, to a smaller indoor venue focused only on those who wanted to experience the music. The risk in making this change was in losing audience numbers, but any losses have been more than compensated by the quality of experience: **"The audience is the main treasure of the festival because our audience does not come here to wait for big names: they're expecting new music, new musicians, new faces, new adventurous things and they're incredibly open to new experiences. For a curator like me, that's the greatest gift you could have."** A longstanding member of EJA, Michalke's international curation is at the heart of his programming: **"I travel the world nearly half the year to attend festivals and concerts, as the festival itself is based on the diverse stages of the world. It's not that the festival itself has an idea - the festival is just a window and my ambition is to be the**

most open, fastest window on what happens on the stages of the world in creative improvised musics, rock, pop, jazz. To be this fast and to display this in one festival in four days, I try to work like a journalist, rather than an artistic approach - I'm not trying to take a position and prove it through the programme, but instead to see if the music I'm hearing has something to say that's more important than others, then try to find maybe the 20 most important things that are being said." This ambitious and adventurous programming model complements the atmosphere in the new festival venue, where everyone is there for the music and family audiences with children can feel secure. As well as building and maintaining a more diverse audience, the programme also attempts to balance its layout in terms of gender, heritage, nationality, age and style, to make it diverse in any criteria: **"The aim is that if you come to Moers for four days, then you will know what's happening in the music today. There are just a few festivals**

in the world where you can find new things and in Europe, the problem is not that there aren't good curators but the lack of a willing audience. You need an audience that will follow you, that takes what you give and says that it doesn't need big names. So if I have to say what it is that makes Moers distinct, it's always the audience: that's what makes the difference."

The story behind Ghent's **HANDELSBEURS** is unusual, both in terms of its inception and financing, and the building itself. Wim Wabbes, the venue's Artistic Director, explains how these particular circumstances led to the current situation: "The venue is unique in Belgium in that in 1934, the CEO of an insurance company decided to invest in Flemish culture to emancipate the Flemish population. From that a fund of money grew - the Noordstar fund - which supported all sorts of artistic organisations, from theatre to dance, music and literature. In 1983 the insurance company started to develop its own music programme in its eating hall which they would transform into the Yellow Room (De Gele Zaal) as a performance space. It was revolutionary in its own way in the beginning - they had good programmers, and would have musicians like the World Saxophone Quartet or Cheikha Rimitti - things you would not normally see performed in such a space. They programmed classical music, contemporary music,

world and some jazz and at a certain moment the programming and artistic ambition grew beyond this dining hall and they bought an old monument which used to be a Trade Fair, hence the name of the organisation, **Handelsbeurs**." The inherent flexibility afforded by the building's design has helped support a more fluid approach to programming, and the main hall is designed not only for retractable seating but also quick partition into different sized spaces, effectively giving seven venues in one space. The history of the building as a trade area - a space of meeting points and exchange - seems to have come full circle in its current incarnation: "We regard ourselves as a space at the crossroads of music, programming jazz, improvised music, classical and contemporary, rock, pop and world musics, because we want to be a music space that isn't defined by genres but instead by good, adventurous music. Many of the musicians we work with do not define themselves through one genre of music; it's a challenge for them to be active in different kinds of music, and it's that diversity that is interesting for them and keeps them going. I think we have to adapt our music centres to this way of dealing

with music. In the end I think music will become genreless because the overlap between genres will be so big that it won't make any more sense to really define it, to put it in a box." Wabbes cites 12 Points featured band, Nordmann, who came second in Belgium's biggest rock competitions because they are a non-vocal instrumental group, or Dans Dans who play in jazz and rock venues alike, as two good examples of this new boundary-testing approach, and suggests: "We have the perfect venue in order to meet that goal because we can have a baroque solo violinist playing Bach on gut strings acoustically one day and the next day we can have a doom metal band in the same hall and it will sound perfect, and will be an intimate way of living and experiencing this music. We invest a lot in technical support too to make it happen but the space itself has that essential quality to deal with presentation of music." As

Moers Festival © Elisa Essex



well as promoting more traditional genre-based series, Handelsbeurs also has a programming approach in which these are mixed, including Strings Attached. This series shows string music in different settings, such as traditional Irish musicians Martin Hayes and Denis Cahill, whose detail and refined articulation, respect for the melody and timing have the same parameters as classical music. Equally genre-defying is kanun player Osama Abdulrasol's quintet, mixing Arabic classical music with Western instrumentation, and improvising from both traditions. Wabbes sees this as an intelligent way of programming: **"To mix the audiences, so that you mix very specific ways of dealing with the music, you can still tell a good story about how and why musicians play together, to find the common language and to build up an audience, and that's not haphazard - these things don't happen by chance."** Wabbes is particularly interested in the way that you can challenge and engage with an audience, and in turn develop a more contemporary approach to programming:

"We have to trust that you can still surprise people: even the most addicted Bach piano fan could be seduced by beautiful Arabian music, for example, and from there you go into different worlds. It's not education, it's just challenging your audience and then you take them on a path, and don't do it too brutally but with the knowledge that he/she has been listening to those types of music."

It's a bit like when you're listening on Spotify and then the machine will go onto some other music, so you might start with Natacha Atlas then end up with Bach, depending on what trip the machine makes. I think the audience today, especially young people who are into listening this way to music - just putting one thing on and then letting it go for ever - they discover a lot of new music and their ears are open to a lot of new music. I think we have to use this way of listening also within our live music experience."

'We are at the crossroads of music and our venue is not defined by genres but by good, adventurous music... we have to trust that you can still surprise people - their ears are open to a lot of new music'

Osama Abdulrasol Trio © Geert Vandepoele



EVENTS, AUDIENCES AND MEMBERSHIP

4

4.1 Events

In total, 50 respondent EJM members promoted and presented 19.954 events, of which 273 were abroad (1%) and 3.033 were free (15%).

Based on this data, we can estimate that in 2009 **EJM members promoted and presented 25.276 events, or 69 events per day, every day of the year**¹⁷. Of these, an estimated **410 events were abroad and 4.062 events were free.**

4.2 Audiences

Together, 45 respondent organisations attracted an audience of 2,9 million to their events in 2013, including 992.000 people at free events¹⁸. Based on this data, we can estimate that in 2013 **EJM members attracted an audience of 4,9 million to their events, including 1,4 million at free events.**

4,9
million audience members



4.3 Participation

22 respondents engaged with an additional 71.015 participants in 2013 in activities including workshops, outreach projects or professional development work. Based on this data, we can estimate that in 2013 **EJM members engaged with a further 222.000 participants through their activities.**

4.4 Audience location

27 respondents stated how far audiences travelled to attend their events in 2013: on average, **81% of audiences were local and 19% were visitors**¹⁹. Very few respondents (9) knew what proportion of their overall audience in 2013 was international and for these respondents, an average of 12% was international.

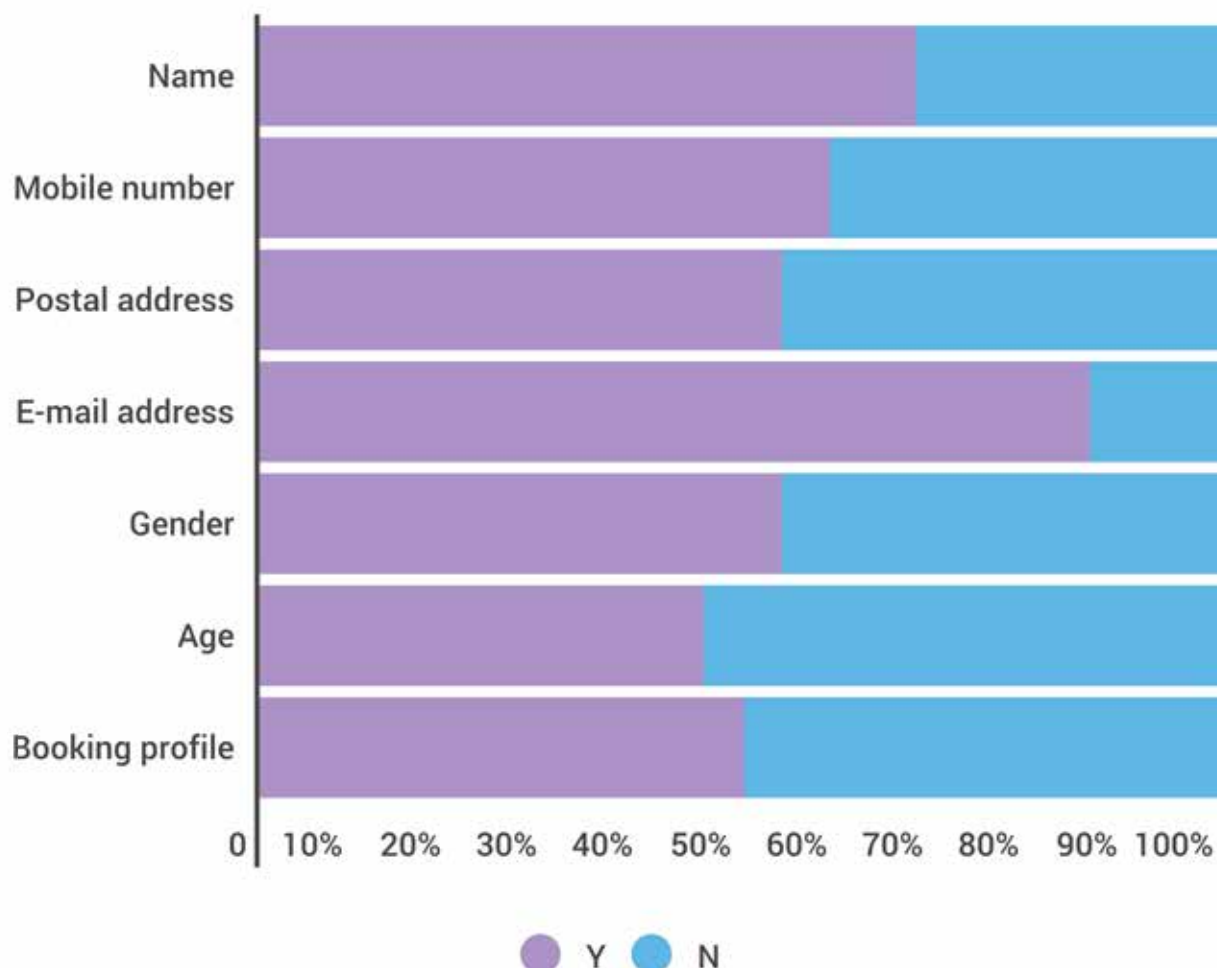
¹⁷ All extrapolations in this section are based on a 10% trimmed mean for all three answers and the same extrapolation methodology as previously. The overall number of events in 2009 and 2013 for EJM members is broadly similar but as the membership has increased, this means there has been a decrease in total events activity. Comparing respondents from 2009 and 2013, the loss of members who posted extremely high events returns in 2009 has impacted on the overall number of events promoted across the membership. One national respondent who is no longer a member contributed over 10.000 events to the total number of events promoted in 2009. If we exclude these high returns, and look at the median number of events promoted by EJM members in the two years, they are 69,5 in 2009 and 72,5 in 2013, showing an increase.

¹⁸ Audience refers to the numbers of tickets sold rather than people, as some audience members may attend more than one event. We asked respondents to calculate their total audience numbers by stating tickets sold to multi-stage events (where 1 ticket = 1 audience member) plus individual tickets sold (in addition to the

above), plus audience numbers for free events, plus audience numbers for other non-ticketed events (in addition to the above). Some members' returns had a discrepancy between the sum of these figures and the total audience quoted because of additional tickets distributed as complimentary tickets or guest passes, including business-to-business transactions. As in the original Strength in Numbers study, we chose to focus on tickets rather than calculating attendance, as the format of multi-stage ticketed events meant that the figures would be inflated (e.g. a 2 day festival with 2 stages and 2 concerts per stage per days sells 100 tickets which allow admittance to all events - this could equate to 800 attendances compared to the more modest number of tickets sold; in the same example the number of tickets sold is 100).

¹⁹ Locals in the questionnaire were defined as audience members who would not require an overnight stay and visitors as those attendees who would require overnight accommodation in order to attend events. This compares to 75% local audiences and 25% visitors in the original Strength in Numbers study.

AUDIENCE DATA FIGURE 14 RESPONDENTS: 22



4.5 Audience data

22 respondents (37%) gave details on the data they held on audiences in 2013²⁰. Although the response rate from members to this question was relatively low, the proportionally heavy reliance on e-mail addresses, with their relative anonymity and lack of demographic data to enable more meaningful audience engagement, is telling.

We also asked respondents whether they had any data on secondary expenditure by their audiences at 2013 events, i.e. expenditure in addition to ticket spend, such as travel, accommodation or food. Of 39 respondents, only 2 (5%) could give any relevant details, which included average food expenditure in their venue and impact on local accommodation providers from a festival.

4.6 Online audiences

For the first time, the questionnaire asked members about their online audiences. 29 respondents gave us details of their online audience in 2013, with a total of 5,01 million website page views, over 76.000 Twitter followers, 148.000 Facebook likes and a much lower engagement with Google +, with 400 followers. Based on this data, we can estimate **online EJM audiences of 11,7 million website page views, 155.000 Twitter followers, 389.000 Facebook likes and 400 Google + followers.**

²⁰ In the first Strength in Numbers study, 21% of respondents across national organisations and non-national organisations said they had additional data on their audiences, so this response of 37% is a heartening increase, although still low. As the questions asked in the two questionnaires were not the same, we cannot compare between the years - e.g. it is hard to know

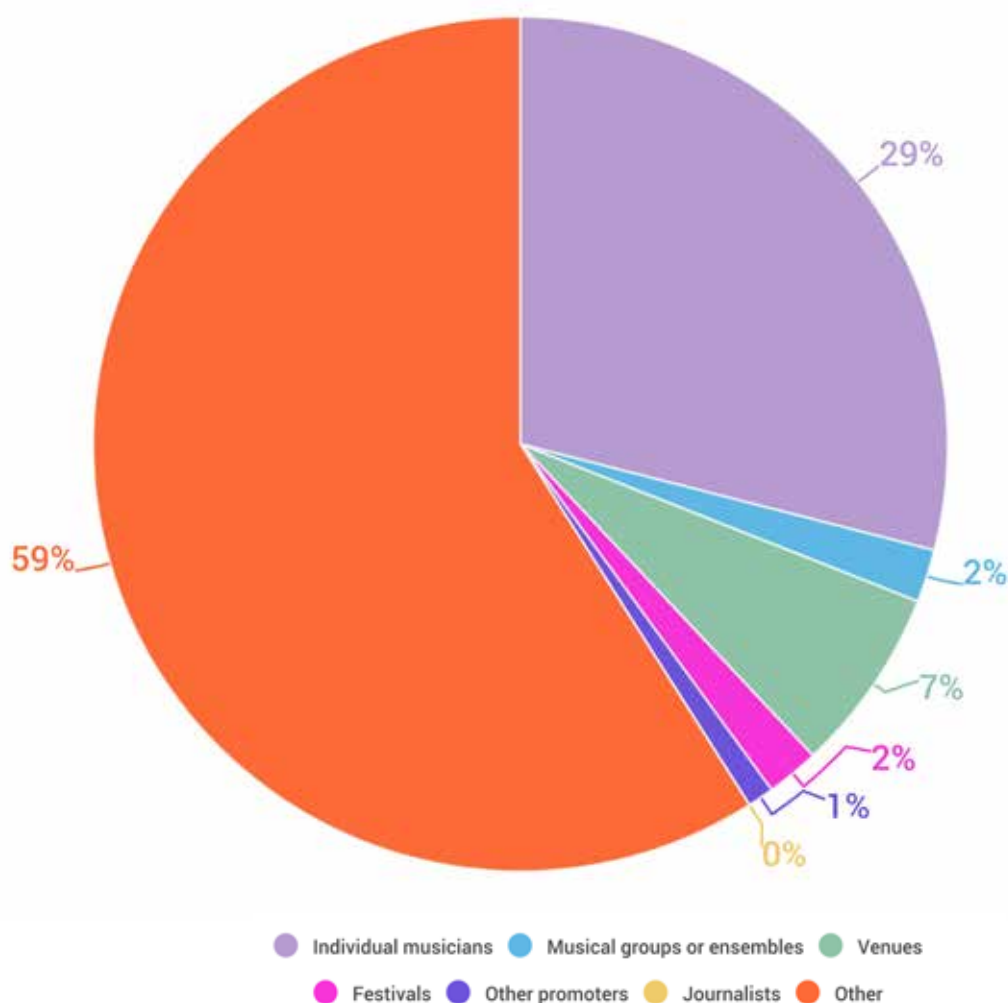
whether the 63% of respondents skipping the question in 2013 did so because they did not have the data - but it is clear both from the analysis of the data collected from 2013 and feedback from members through the research process that effective audience data management is still a significant issue for the EJM membership.

4.7 Membership

Of 47 respondents, 13 identified themselves as membership organisations (28%), i.e. being organisations that, in addition to other roles, also attract and service their own members.

Of these, 11 respondents had 3.838 members in total in 2013, comprising the following types of member:

ORGANISATIONAL MEMBERSHIP FIGURE 15 RESPONDENTS: 11



If we extrapolate this to the whole membership, we can estimate that in 2013 **EJN members themselves reached a further 6.294 members through their own organisations' memberships, ranging from individual musicians to ensembles, festivals and journalists²¹.**

²¹ The extrapolation methodology was 10% trimmed mean, as previously, applied to the overall proportion of the total membership likely to have their own members, based on the data collected.



National Forum of Music © Łukasz Rajchert

**'We have this space
that you can really do
something exciting with,
and we want to bring
down the wall between
us and the audience'**

CASE STUDY:

THE SPACE IS THE PLACE: CREATING VIBRANT VENUES NATIONAL FORUM OF MUSIC/ SAGE GATESHEAD

Although Wrocław's stunning new venue, **NATIONAL FORUM OF MUSIC (NFM)**, only opened in autumn 2015, the idea of having a new concert hall for the third biggest city in Poland had first been suggested in the 1970s; despite an initial architectural competition and plans, the project halted because of lack of funding. The idea was revived in the early 2000s and the sustained political support of the city's longstanding and popular mayor was crucial to its eventual success, according to NFM international director and Jazztopad Artistic Director Piotr Turkiewicz: **"The city's mayor had the idea to develop the city both economically and culturally on the same level, so from the very beginning he wanted to invest in culture and treat culture as a kind of trigger or an engine for the economic development of the city. So Andrzej Kosendiak,**

NFM's Director, had this crazy idea to build an incredible new concert hall in this city and that's when the whole process started. The venue had two priorities from the beginning: the first being the design of the acoustics, and the second was that the whole complex would be flexible enough so that it could feature all the cultural life of the city." Continuous political support was vital to the project, as was the project's successful application to the EU for significant funding, comprising some 30% of the total budget required, which gave the project the impetus it needed to raise the total funds. In creating the new institution, two former organisations were merged - Poland's largest classical music festival, International Festival Wroclawia Cantans, and the Wrocław Philharmonic. NFM is now home to a huge amount of artistic activity, including 11 resident

ensembles, 9 international festivals and the promotion of some 900 events per year, as well as an ambitious education programme. The venue has been designed to be used flexibly, with a whole moveable roof, and a full range of acoustic options, from a cathedral-like sound to a cosy space for amplified music. The main hall, despite its 1800 seats, is designed to connect the audience to events, enabling a sense of being close to the stage wherever the audience are seated. NFM has had the dual challenge of ensuring the quality of content for its acoustically state-of-the-art venue spaces, as well as strong audience support. Turkiewicz explains the work which went into both aspects of preparing for the venue's opening: **"Lots of work was done on the quality of the resident ensembles, and we now have many international performers in the ensembles, which is unusual for**

Poland. The sheer scale of the number of resident ensembles is unusual too, compared to other venues, and one of the things this enables us to do is run huge educational projects right through from pre-natal, teaching new parents to sing lullabies in hospitals, upwards. In addition to the education work, we've also set up a network of projects in the region to bring audiences from smaller towns and cities to the hall." One of the most successful projects NFM has run is in celebration of the human voice: "Ten years ago we realised that the choir tradition in the country had disappeared and we set up a programme called Singing Wrocław to set up choirs in schools. This grew to Singing Poland, and we established 400 choirs across the country. This has really changed the choir environment in Poland, and it was a festival and city initiative. We're now working on Singing Europe and the culmination will be 30,000 young singers from all over Europe coming to the city in 2016." Turkiewicz acknowledges that the first year of the NFM's operation is unusual, in that audiences have been naturally curious to visit it, but is also realistic about the need to build trust in the venue's offering: "It's been extremely important to build up trust in what we do, and to build a brand. Over the last couple of years we've managed to create a sense of consistency in our artistic programming, so that all the festivals we run, for example, have a very clear artistic vision and consistent artistic level. People come to the concerts

because they trust the festival rather than knowing the artists." Turkiewicz talks about the NFM and its festivals taking audiences on a journey and creating taste, rather than serving or suiting existing tastes, and the role of commissioning in this: "We commission a lot of music - almost every festival commissions new work - and I think we've built a certain level of curiosity, and people want to come here because they want to experience something different. A lot of people in the old venue would have loved to see the artists but they hated the venue, in the sense that for a lot of events, the venue was killing the music. Now we finally have this space that you can really do something exciting with and we want to try and bring the wall down between us and the audience."

The UK's **SAGE GATESHEAD** is another iconic venue whose active EJN membership helps drive its jazz programme, as Ros Rigby explains: "Jazz has always been a significant part of Sage Gateshead's artistic programme, and the jazz festival was the first festival we ever did. In our pre-opening consultation, it was clear that the region needed a jazz festival and to have a way of bringing names to the North East of England that wouldn't otherwise come." Now 11 years old, Gateshead

International Jazz Festival remains the jewel in the Sage's jazz programming, and has brought McCoy Tyner and Ornette Coleman in previous years, as well as introducing a broad diversity of new artists, styles and musics. Fellow EJN member Serious are artistic advisors to the Festival, and have been since its inception, and Rigby's membership of EJN has



The Sage Concourse © Mark Savage

particularly helped to diversify the range of European jazz artists featured both during the Festival and year-round in the venue's programming. Rigby is clear that the mix of concert promotion and participation is at the heart of the Sage Gateshead's mission: **"It's both about bringing the best music of all genres from around the world, taking risks and enabling our local audience to appreciate and enjoy that. It's also about supporting locally-based artists of all genres and giving them an opportunity, and sometimes mentoring them. It really is as much about people learning about music as it is about performances, so we probably have one of the world's largest scale learning and participation programmes connected to a concert hall anywhere. We still employ over 100 freelance musicians just to work on our learning and participation programme, and that takes them out across the region, not just in the building. As well as satellite groups all over the region, we have around 1.000 people a week coming in to do different kinds of musical activity, and that's about providing opportunities for people to learn, using music as a way of addressing social issues and particularly enabling young people to gain life skills."** One project of which Rigby is particularly proud is the venue's flagship youth jazz ensemble, Jambone, a 15 piece group of 13 - 19 year old musicians who have had incredible musical experiences and opportunities: **"I've always been concerned that Jambone is challenged and have opportunities**

to work with visiting artists and to do special projects for the festival, and they've worked with a lot of different artists including Andy Sheppard, Brass Jaw, Jazz Jamaica, Tim Garland and recently on Phil Meadows' Life Cycles project for the 2016 festival. Phil Meadows re-arranged Life Cycles for Jambone to play with our resident orchestra, Royal Northern Sinfonia, and as all the players were mixed in with the orchestral sections, that was a huge opportunity for young people to sit next to professional players. We were particularly proud that a former Jambone member, Matt Roberts, returned to the project as a conductor, composer and arranger." Jambone has also benefited from Rigby's EJM connection, which resulted in a performance opportunity in Amsterdam's legendary Bimhuis in February 2016: **"We had to re-arrange Jambone's planned trip to Germany because of the host venue being used to house refugees, and through our Dutch EJM colleagues Paul Gompes and Huub van Riel, they were able to broker Jambone coming to the Netherlands, and to play at the Bim alongside a youth jazz ensemble from Amsterdam. This was exciting and challenging; in showing our musicians the excellence they are aiming for, it raised their aspirations and broadened their horizons."**

'We use music as a way of addressing social issues and giving life skills to young people; it raises their aspirations and broadens their horizons'

Jambone, Gateshead © John Watson Jazz Camera



5

5.1 Organisational research

We asked respondents to tell us about any research conducted by their organisations since 2012, including audience research, economic impact studies, other impact studies, mapping or benchmarking work. This also included participation in a similar programme of research in collaboration with other organisations. Of a total of 46 respondents, only 6 respondents (or 13%) had undertaken or collaborated in research²². Of these, the most relevant report cited related to Tampere Region Festivals audience research (see section 3.12 for more on this report).

5.2 National data on jazz

We asked respondents whether they had access to recent and reliable national data on jazz in their country, including numbers of festivals, dedicated jazz venues, individual

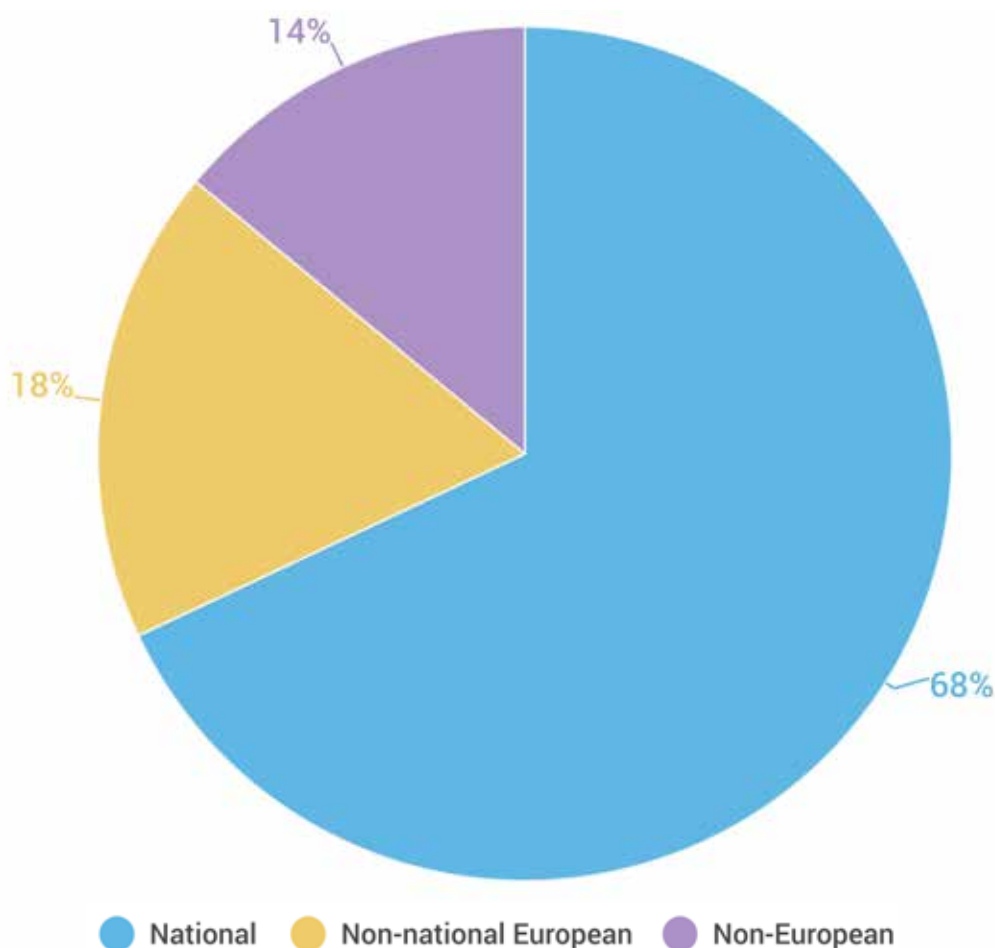
musicians, groups, large ensembles, record labels, periodicals, websites, radio airtime and third level/Higher Education jazz institutions that they would be willing to share.

Of 43 respondents, 19 (or 44%) had data of this type that they would be willing to share, and these 19 respondents in total represented 11 countries: Austria, Belgium, Denmark, Estonia, Finland, France, Germany, Ireland, Luxembourg, Norway and the UK.

5.3 Artists' nationality

We asked respondents to tell us about the nationality of the artists they promoted through their own events in 2013. Of 45 respondents, this was the average mix of national origin²³:

ARTISTS' NATIONALITY FIGURE 16 RESPONDENTS: 35



²² This compares to 33% in Strength in Numbers who had participated in research during the previous 5 years.

²³ We advised respondents to refer to the nationality of the leader of the ensemble if they were of mixed origin - e.g. if they were born in Europe, this would count as a European ensemble.

5.4 Promotion of national artists

We asked respondents whether their organisation funded or promoted national jazz artists through touring, showcases or other promotional activities. Of 44 respondents, 27 undertook these activities (61%) and 17 didn't (39%).

Funding for national jazz artists²⁴ to perform or tour abroad was offered by 8 of the 30 respondents (or 27%), representing 7 countries: Belgium, Denmark, France, Ireland, Luxembourg, Norway and Poland. Together, these 8 organisations supported **2.050 artists in 2.059 performances.**

Funding for national jazz artists to perform or tour nationally was offered by 8 of the 30 respondents (or 27%), representing 8 countries: Austria, Estonia, France, Germany, Ireland, Norway, Poland and the UK. Together, these 8 organisations supported **767 artists in 973 performances.**

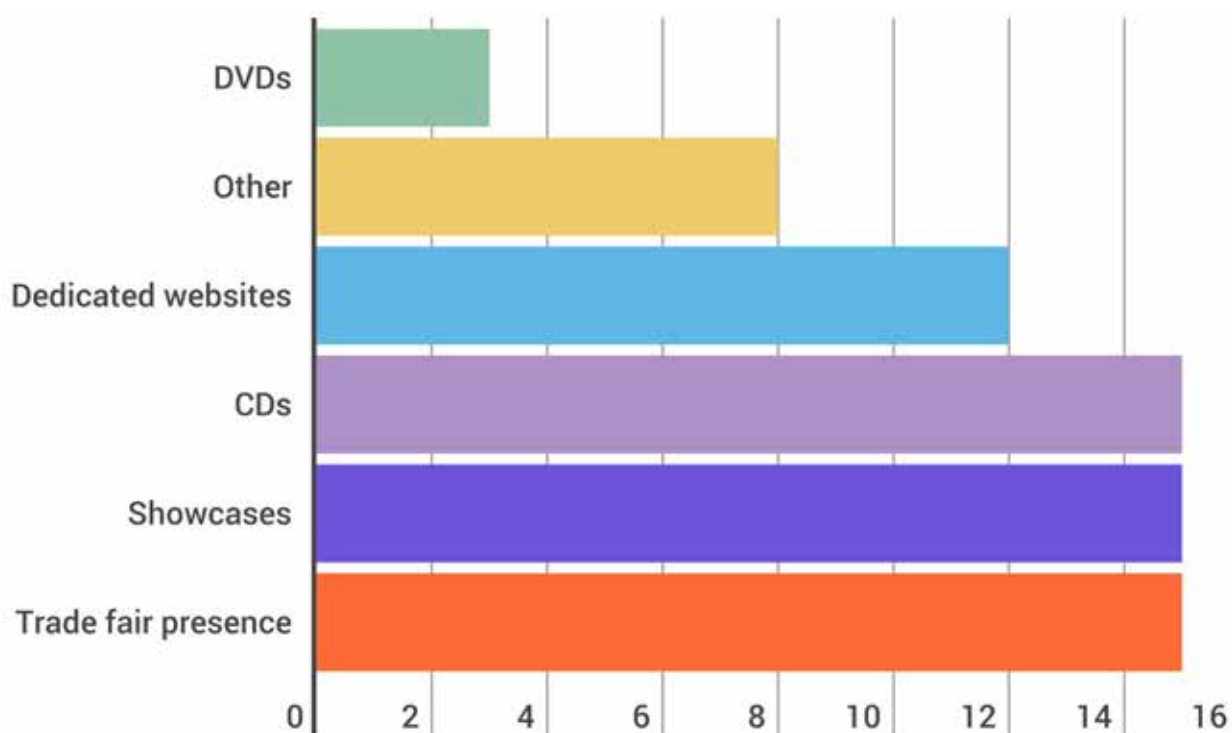
13 of 30 respondents (or 43%) facilitated international exchange programmes for groups or individual musicians in 2013, including some projects featured in Strength in Numbers previously (such as 12 Points! or Take Five Europe), and a range of activities including artists in residence programmes and workshops, as well as concert exchanges, often with multiple country partners.

5.5 Showcases

16 of 28 respondents (or 57%) organised a showcase in 2013, and together these organisations attracted **506 international artistic directors or promoters, 105 international journalists and 171 other international attendees**²⁵, including colleagues through EJN, programmers from the US and Canada and other international peers.

Lastly, we asked respondents to tell us the ways in which they promoted national artists in 2013:

NATIONAL ARTISTS' PROMOTION FIGURE 17 RESPONDENTS: 25



'Other' promotion included help with digital showreels, publicity photos, electronic press kits, CPD, films about national artists for broadcast, international presentation projects, PR and media relations and other opportunities for performance and presentation, including APAP (Association of Performing Arts Presenters) in New York.

²⁴ National artists were defined as artists based in each respondent's own country.

²⁵ 'International' in this context was defined as people not coming from the respondent's own country.



I-Jazz © Andrea Braconi

'The outcomes from Strength in Numbers were used proactively to build a case for increased investment and support for jazz in Italy'

CASE STUDY: **A TALE OF TWO NETWORKS** **I-JAZZ/NORSK JAZZ FORUM**

Founded in February 2008, **I-JAZZ** is the Italian jazz network formed by 14 of the country's leading jazz festivals. This relatively newly formed network has been built through and with the support of EJN, and proactively used the outcomes from Strength in Numbers and the network's members to build a case for increased investment and support for Italian jazz. The result was a significant increase in support for the sector, as I-Jazz President Gianni Pini explains: **"Our delegation of I-Jazz, EJN staff and board members met the minister of culture in 2015 and it was extremely successful. The minister confirmed his commitment to increasing the resources available to finance jazz - including a threefold increase in funding - as well as his support for our large-scale project, Il Jazz Italiano per L'Aquila, in the autumn."** The significant increase in state support has enabled a doubling of the funds available to jazz through some funding streams, and more than trebled direct funding for some Italian jazz organisations who have traditionally suffered from relatively lower support than for other artforms. As well as welcome additional financial support,

the sector has also benefited from the increased profile made possible by the high profile concert organised in L'Aquila in September 2015, designed to draw attention to the city which was hit by a devastating earthquake in 2009. As one of the regular activities to focus on the city's ongoing reconstruction, the concert was a marathon of jazz musicians appearing on 18 different stages, and drew 60,000 people to performances on one day. Pini is clear about why the concert was so successful: **"All 600 musicians involved in the concert gave their time free of charge, and it was a great example of solidarity across the sector and of the power of cultural development. As the single largest gathering of Italian jazz musicians of all time, the event was an important step for jazz in Italy, and showed how the sector could come together successfully to converge on a common project. There is now going to be an annual event in L'Aquila for the next three years, and this will continue to contribute to the cultural and economic renaissance of the city."** Another important legacy of the increased support for Italian jazz is the recent development of the www.italiajazz.it jazz

portal, which includes a comprehensive database of the Italian jazz scene. Pini is optimistic about the future development of the sector's profile: **"It's a really exciting development for jazz in Italy, in having this systematic overview of the jazz ecosystem of the country. We've discovered not only its potential but also hidden treasures, and I think that will have a huge resonance at an international level."**

At the other end of the spectrum, EJN member **NORSK JAZZ FORUM** celebrated its 60th birthday in 2013, and has a membership that represents the whole national scene. As a membership-led organisation serving a diverse range of organisations, from festivals to clubs to big bands, its services are varied, as Gry Bråtemyr explains: **"We undertake a range of different projects and have different tools to reach these members - for example, we reach out to musicians with funding to help them tour abroad, and bring members together annually to exchange knowledge and ideas, whereas on a national level, we help clubs by gaining tax refunds. That's one of our**

big challenges, meeting the needs of all these different groups." The unique jazz infrastructure in Norway, which includes five regional centres in addition to Norsk Jazz Forum, means that the roles of each organisation are distinct and NJF's role is often in lobbying at a national level: **"We work very closely with other organisations and, once our own organisation was unified in the 1990s from its roots as two organisations serving the musicians and the clubs, it really helped to get everyone under one roof to stand together with one voice and say 'this is what we need now'. It was a strength in numbers exercise and it was completely essential in getting that much government funding."** A significant part of NJF's success lies in keeping a high profile and working collaboratively: **"There's a lot of political work and lobbying, as well as working with other membership organisations in other genres. We run errands in the government every other day and we also have a look if there's a new law on something coming up, and always write our opinion on that. We find that we get heard if we work with other music organisations so it's absolutely necessary to do that, to keep funded the way we are. And we obviously have to deliver and we have to be interesting."** One important project that has really had an impact on the sector is the Art of Balance, which looks at gender balance in jazz. The impact of this long term project has been significant, according to Bråtøy: **"We started actively measuring gender balance**

about 5 or 6 years ago with clubs and festivals, to get them thinking and to become more conscious about their choices and their bookings. We were asking the questions, then they asked themselves the questions, and now we can see that the figures for female participation are going up. It's been a profoundly positive effect which has really worked, as there are many more women now in the sector." NJF is one of 35 Norwegian music organisations working together on the Art of Balance project, ranging from Concerts Norway to small agents, and the next aim is to develop the project internationally. Not only are the impacts good, but there is also a positive feeling about the issues: **"Just a few years ago, they didn't talk about gender balance at all in the music industry and there was a sense that it was just nagging, but now it's a national project it's just spreading and has developed a really good vibe, as it's taking big steps."** As well as collecting regular quantitative data from its members to help support membership development, the hard and soft data from both its funded projects and its competitive Jazz Intro project for recently graduated or emerging new bands helps to paint a picture of the sector's development: **"We receive 700**



Norsk Jazz Forum © Erik Aashelm

applications for funded projects a year, which gives a big picture of what's going on with our members, what kind of gigs they do, what their finances are like and so on. Over the 10 editions of the biennial Jazz Intro project, we can also see what's happening and what's new - this year we had 70 applications, each submitting 3 of their songs - and looking back at the track record of the winners, they are all now professional musicians with a good profile." NJF also has an eye to the future, Bråtømyr says: "For the past 8 years, we've been working actively with kids as an audience, moving from smaller primary aged children to our Monitor project for the youth and teen audiences. Young people are also working as promoters and club runners, working with the press, taking tickets in the door, so we're engaging young people

of all types and at all levels - not just on the stage." Preparing the artform for the future is an ongoing challenge: "We're in between two times now about how you run concerts, and how you work as an artist because of the digital new world and globalisation. The whole old model of how you run a jazz club, for example, I'll be fascinated to see if that's standing in 10 or 20 years. What will the new jazz club look like? Will it just be jazz or a fusion between genres? And the growing trend of musicians producing their own concert series, clubs and festivals. That's going to be interesting to pay attention to as we continue to recruit new members presenting the music in new ways around the country. Being in touch with the music through our projects helps us stay one step ahead and the future is exciting."

'Being in touch with the music through our projects helps us stay one step ahead and the future is exciting'

Norsk Jazzforum © Eirik Aasheim



THE FIGURES IN CONTEXT

6

This final section of the report seeks to place key data from 2013 in comparison to the 2009 data, presented in the original Strength in Numbers study. Given the inevitable lag in publication date from the sampling period (2013) in the data, this section also makes some estimated projections on the size and scale of the activities of EJM's current membership, which has expanded since 2013.

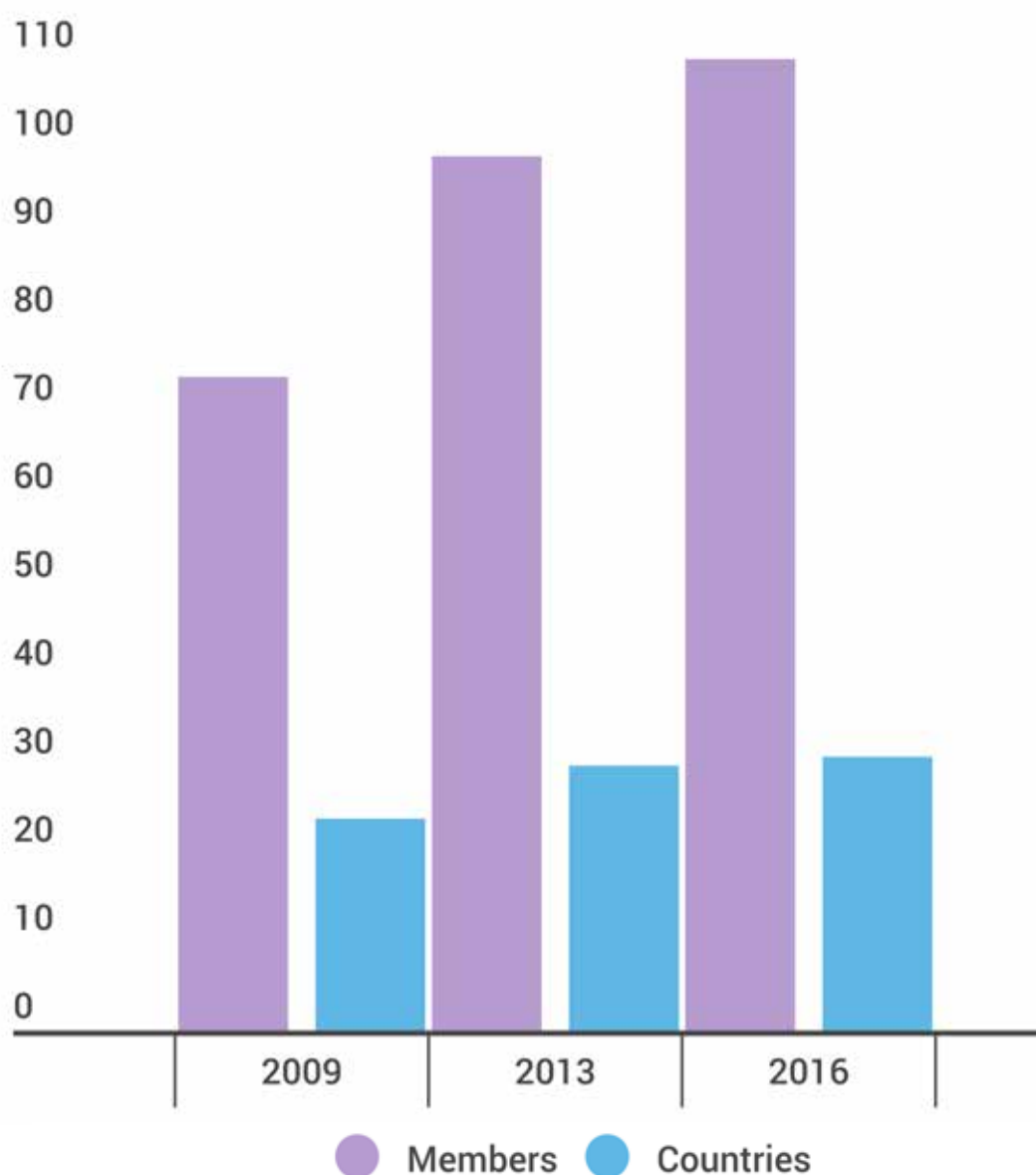
6.1 Membership profile

In 2009, the membership of EJM for research purposes was 74 members in 24 countries, in 2013, it was 99 members in 30 countries and in 2016, it is 107

members in 31 countries²⁶.

In making comparisons between the three periods, because of the growing membership, it has been necessary to select a methodology which enables comparison across the totality of the organisation but accounts for the different membership sizes. In other words, the figures shown in all the sections below aim to demonstrate the data trends between the two studies (and to give an estimate for the 2016 data, where appropriate) after adjusting the figures to account for the different membership numbers. (See the footnote below for further explanation²⁷.)

EJM MEMBERSHIP PROFILE FIGURE 18



²⁶ The membership figures for all three years relate to eligible members for research purposes, i.e. they exclude members who were either not trading during the sample years of 2009 and 2013 or honorary members, whose data is not eligible for inclusion.

²⁷ The method chosen is based on the 10% trimmed mean method used throughout for extrapolation purposes. In order to make comparisons between 2009

data and 2013 data, we have used the trimmed mean from 2013 data, multiplied by the research population of 2009 minus the trimmed number of responses removed, with the outliers added. It is likely that the distribution of data is different in the different sample years and alternative methods for calculating the comparison between the data sets give different results. Given this, these figures should be used cautiously.

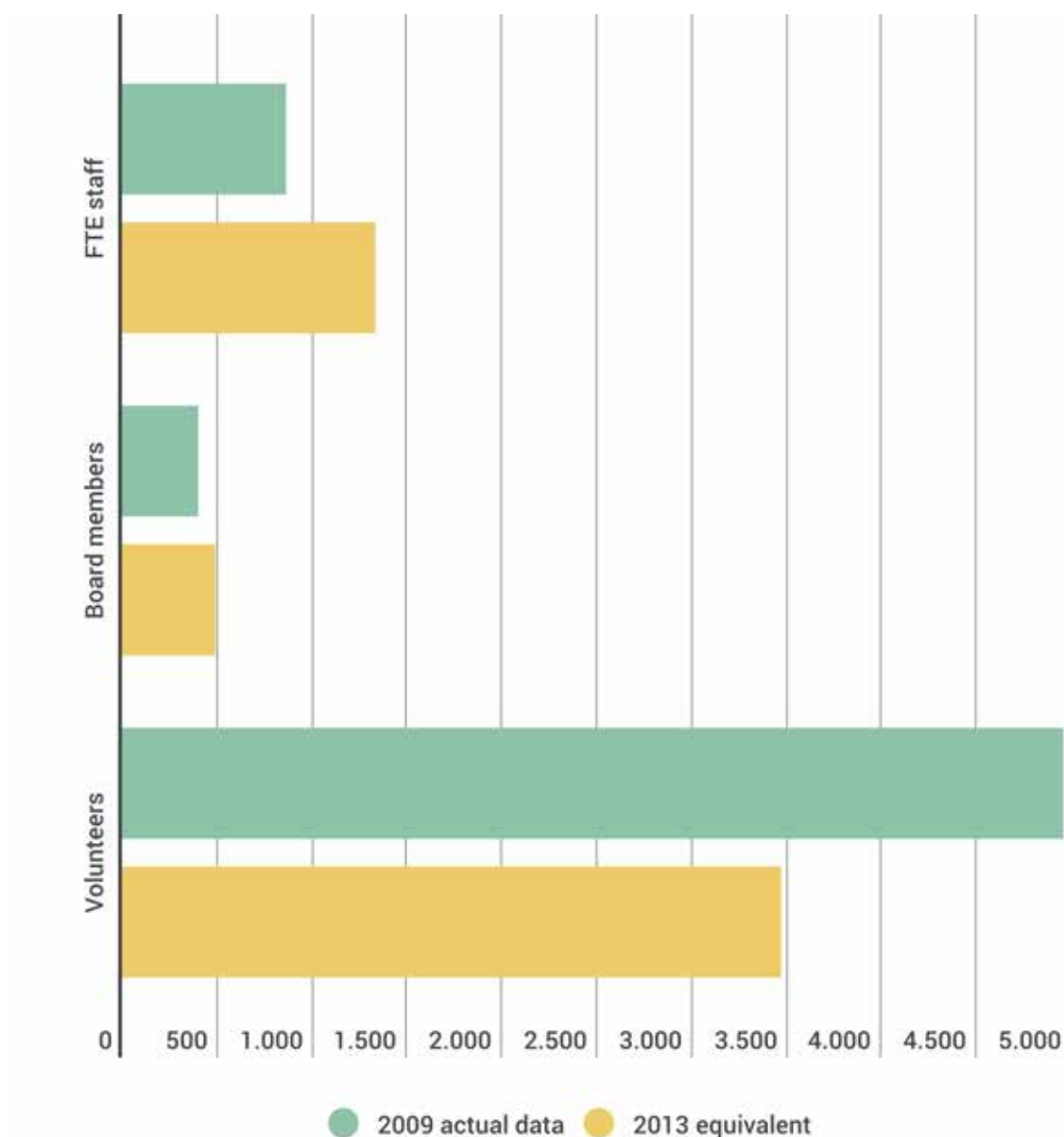
6.2 Staffing

The table below shows the comparative size of staffing and volunteer resources used by EJM members across the two studies, based on the same membership size. The 2009 actual data shows the figures from the original Strength in Numbers report, and the 2013 equivalent column shows what the 2013 data would look like based on 2009's membership size to show the relative change over time:

There is a noticeable decrease in volunteer numbers, but increased FTE staffing resources.

If we were to assume the same distribution and profile of membership in 2016 as 2013²⁸, we can estimate that EJM members today employ **1.391 FTE staff**, supported by **527 board members** and **3.673 volunteers** giving **23.839** days of volunteer time.

COMPARATIVE HUMAN RESOURCES FIGURE 19



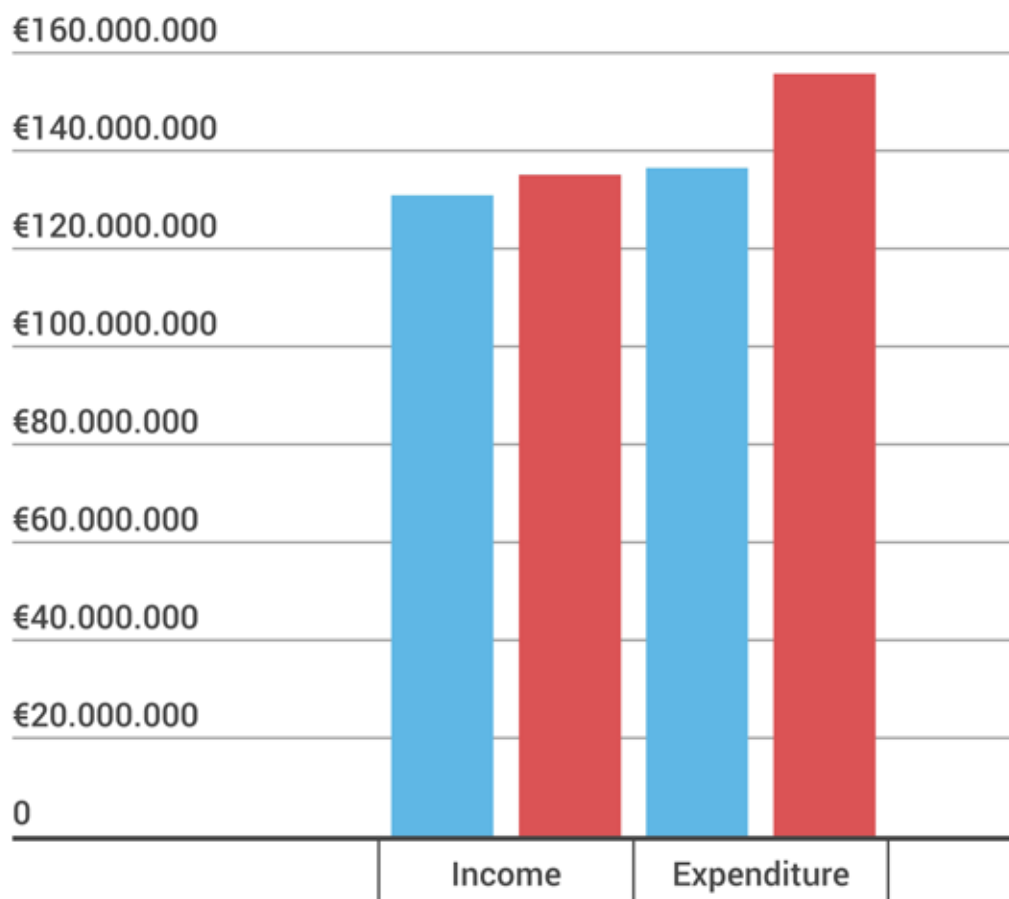
²⁸ These projections are also to be treated cautiously as they make assumptions about the size and distribution of data amongst the current membership that cannot be confirmed. These figures are to demonstrate the possible increase in the data findings based only on the increased membership size in 2016, but the same pattern of data.

6.3 Finances

The table below shows the comparative size of income and expenditure for EJM members across the two studies, based on the same membership size. As previously, the 2009 actual data shows figures from the original Strength in Numbers report and the 2013 equivalent column shows how the 2013 data would compare, based on 2009's membership size. This shows the relative change over time:

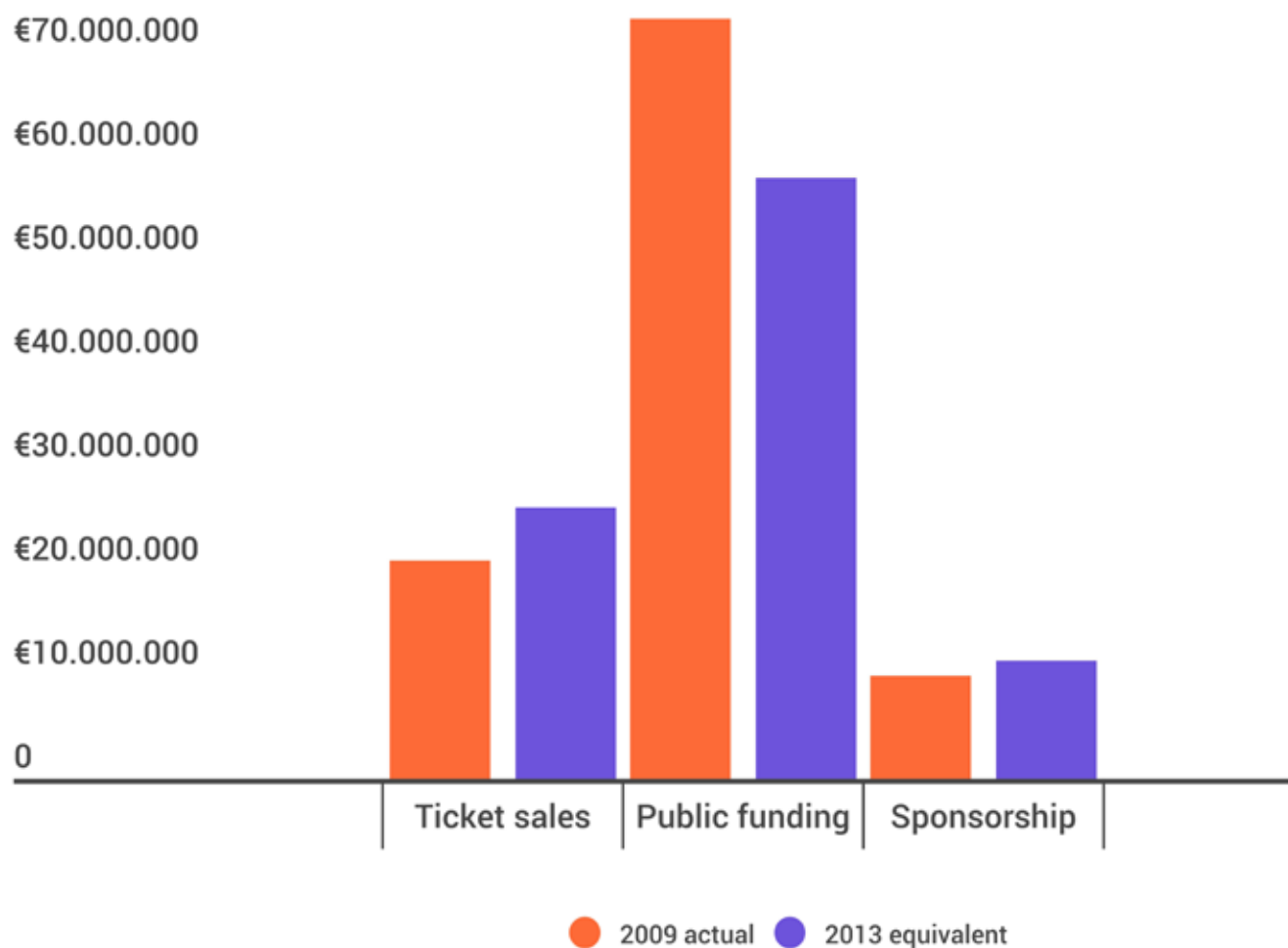
If we were to assume the same distribution and profile of membership in 2016 as 2013, we can estimate that EJM members today generate **a total income of €177 million, total expenditure of €187 million and an economic impact of at least €466 million.**

COMPARATIVE TOTAL INCOME AND EXPENDITURE FIGURE 20



If we analyse some of the key areas of income, there is a marked decline in public funding investment but increases in ticket sales and commercial business sponsorship²⁹:

COMPARATIVE SOURCES OF INCOME FIGURE 21

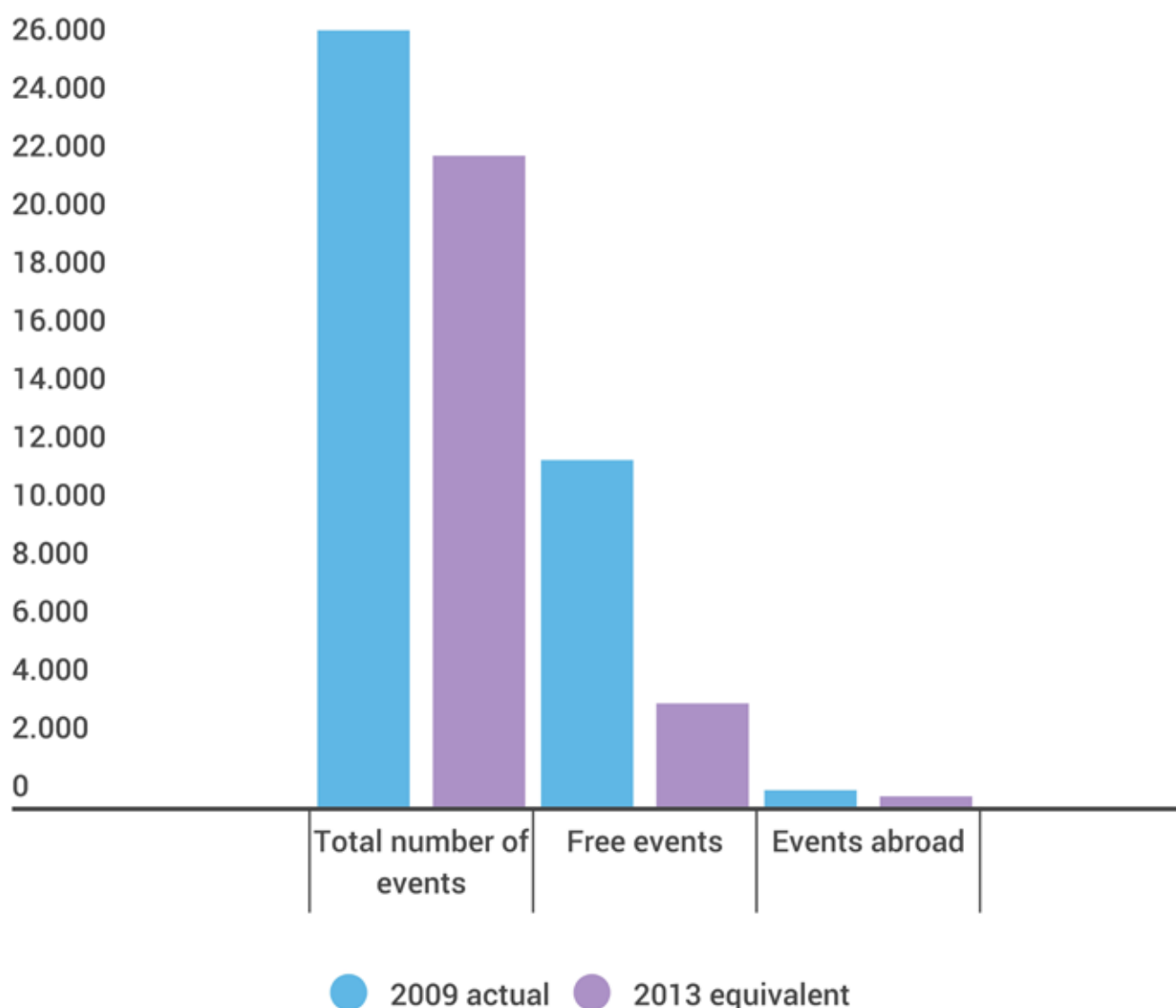


6.4 Events and audiences

The table below shows the comparative total number of events promoted by EJN members, and the relative number of free events and events promoted abroad within that total number. As previously, the 2009 actual data shows figures from the original Strength in Numbers report and the 2013 equivalent column shows how the 2013 data would compare, based on 2009's membership size. This shows the relative change over time:

²⁹ Data on artists expenditure cannot be easily compared as the 2009 and 2013 questionnaires requested different information - the 2013 questionnaire was simplified and removed some categories on artists expenditure (such as subsistence payments etc.) which were included on the original questionnaire.

COMPARATIVE EVENT PROMOTION **FIGURE 22**



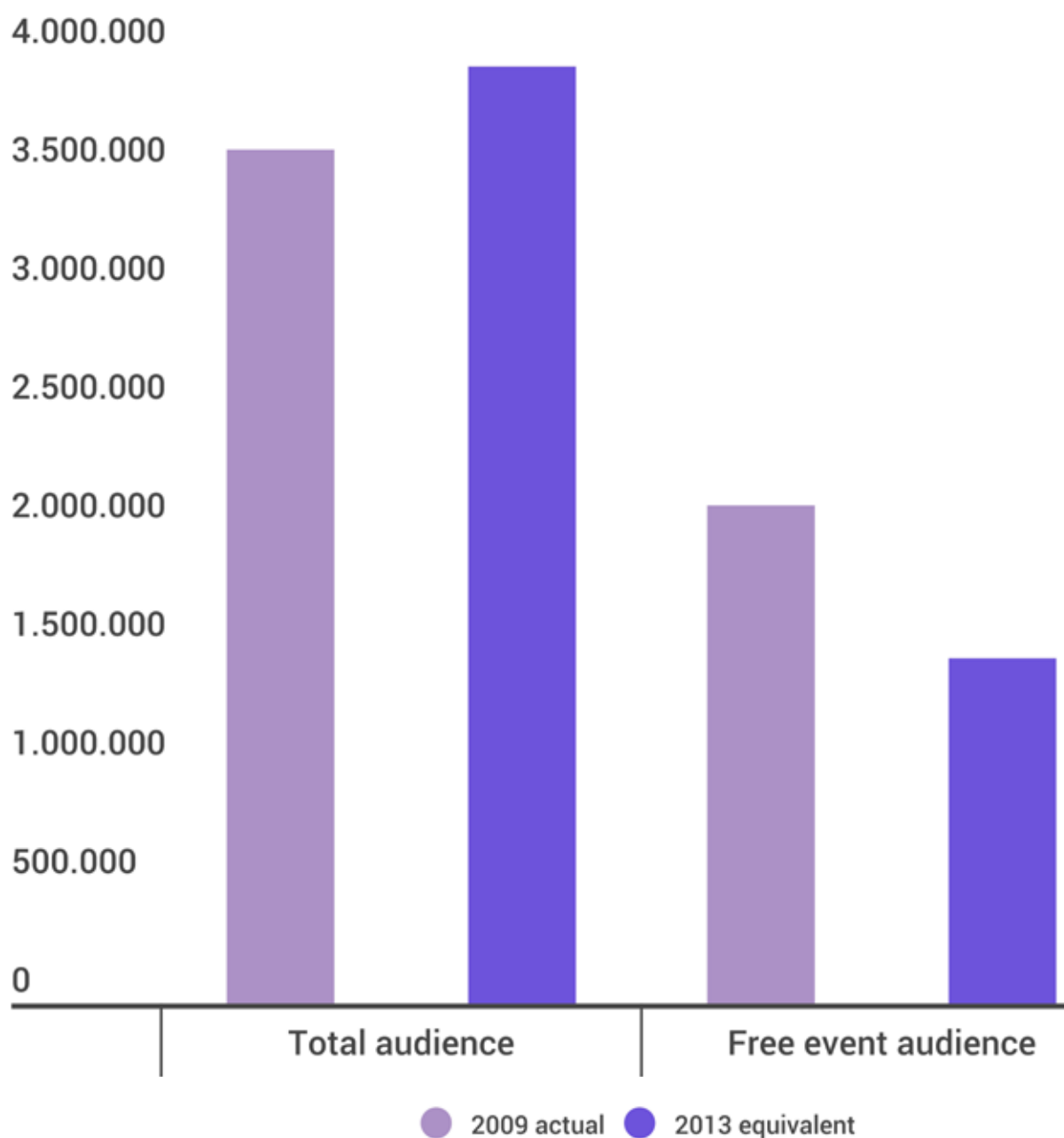
There is a significant decrease in free events - as mentioned in footnote 17 above, the overall decrease in total events promoted may be explained by the relative change in membership between the two studies, and the loss of a national organisation posting very high returns in the original data. One could also query the correlation between the significant decrease in free events and the decrease in public subsidy.

If we were to assume the same distribution and profile of membership in 2016 as 2013, we can estimate that EJM members today promote a total of **26,203 events per year, or 72 events per day**; this includes **428 events in other countries** and **4,227 free events**.

The table below shows the comparative total number of audiences attracted to EJM events, and the relative audiences for free events within that total number. As

previously, the 2009 actual data shows figures from the original Strength in Numbers report and the 2013 equivalent column shows how the 2013 data would compare, based on 2009's membership size. This shows the relative change over time:

COMPARATIVE AUDIENCES FIGURE 23



In line with the decreased free events, noted above, this shows a decrease in audiences for free events but an increase in the number of audiences attending EJM members' events overall.

If we were to assume the same distribution and profile of membership in 2016 as 2013, we can estimate that EJM members today welcome **audiences of 5,2 million** to their events, including **1,5 million at free events**.

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APPENDIX 1:

FULL QUESTIONNAIRE

1. Welcome to the 2015 EJM survey! Before you begin...

Please be aware that this questionnaire asks for detailed and accurate information about your organisation's activities and finances in 2013. In order to answer the questions, you will therefore need access to the following information and documents:

FINANCIAL INFORMATION

- * audited accounts for 2013
- * detailed income and expenditure for 2013 (including details of most major income and expenditure items, such as staff salaries, overheads, administration, artists' fees, grants, box office income, sponsorship etc.)
- * income figures for 2011, 2012 and (where possible) 2014

AUDIENCE DATA

- * audience numbers for 2013, including numbers of tickets sold and numbers of audience attending non-ticketed events
- * location of audiences (local vs. visitors)

OPERATIONAL AND MANAGEMENT DATA

- * staff details - numbers and types of staff, including temporary and subcontracted personnel
- * volunteer details - numbers and types of volunteers
- * student trainee and interns details
- * if you are a membership organisation, details about numbers of members and fee
- * if you are a funding organisation, details of the numbers of performances and musicians you supported in 2013, both in your own country and abroad

EVENTS DATA

- * number of events promoted or presented in 2013
- * details of online audiences during 2013 (website, Twitter, Facebook)
- * if you presented a showcase, numbers of attendees

RESEARCH

- * details of any research you have commissioned or participated in during the last 5 years
- * reference details of any national data you hold on jazz
- * details of any research on secondary expenditure by audiences at your events

If you are unable to complete the questionnaire in one sitting, you will be able to save your completed responses and return to the questionnaire again as many times as you need before final submission. Please use the survey's own navigation buttons (Prev/Next) rather than your browser's navigation (the back button) to enable your questionnaire responses to be saved. If you have any queries about this, please get in contact with Fiona Goh - tel: +44 7722 038937, e-mail: fiona.goh@virgin.net

Please remember to complete and return the questionnaire by the deadline of **MONDAY 4 MAY 2015**.

Please be aware that any information you provide is **CONFIDENTIAL** and will be used for the

purposes of building a statistical picture of the EJA membership as a whole, and we will not identify your organisation individually or make reference to individual questionnaire responses without your prior permission.

Thank you!

FREQUENTLY ASKED QUESTIONS

Q: I am responding on behalf of an organisation which does not only focus on jazz - how do I answer?

A: We are seeking to present a picture of the **WHOLE** of EJN, which includes some organisations which are wholly dedicated to jazz and many organisations for whom jazz is only a part. We are seeking information on your whole organisation as a member of EJN, so please give all your financial information related to the **WHOLE** organisation's financial turnover, personnel and activities. You will get a chance to tell us what % of your organisation's activity is focused on jazz in a separate question. Please get in touch with Fiona Goh before you start to complete the questionnaire if you have any queries about this: fiona.goh@virgin.net

Q: My organisation doesn't operate in Euros - how do I answer the financial questions?

A: The questionnaire includes currency exchange rates for all the relevant currencies used by EJN members - please use these rates to convert your answers into Euros, and give all answers in Euros.

Q: My organisation's financial year does not run to the calendar year 1 January - 31 December for 2013. Which financial year do I report on?

A: Please report on the year in which the majority of your 2013 activity happened - e.g. if you are running an annual festival which happens in July, ensure that the financial year you report on includes figures for July 2013. The questionnaire will ask you to tell us the dates of the financial year you are reporting on. Again, if you have any queries about this, please do contact Fiona Goh before you start to complete your response: fiona.goh@virgin.net

Q: What do you mean by a 'national or service organisation'?

A: Members who completed the earlier research questionnaire will know that we asked different questions of national organisation members in 2011. This time, we are asking everyone to complete one questionnaire but simply to indicate if you are a national or service organisation - these types of organisation include, for example, jazz federations, regional or national support organisations for jazz and music information centres.

Q: This is a really complicated questionnaire and I'm not sure that I can answer it all. Help!

A: You will be able to save your answers and return to the questionnaire as many times as you need before you finally submit it. If you are struggling to answer a question, please contact Fiona Goh for assistance (fiona.goh@virgin.net). If you are unable to answer a question, please feel free to skip that answer and move onto the next question. We would rather receive a partially completed questionnaire than nothing at all. Some questions do require an answer, though (they are marked with an * asterisk); the survey will ask you to complete these before you can move onto the next page.

3. Contact details and organisational history

* 1. Contact details

Name of organisation

Organisation website

Name of person completing this questionnaire

Your e-mail address

Your daytime telephone number

2. In what year was your organisation founded?

3. Please tell us about the status of your organisation (pick one only):

Please give more details if partially non-profit and partially commercial:

* 4. Please tell us which of the following best describes your organisation (pick one only):

Please give more details if you chose 'other':

4. About your activities

1. Please tick ALL of the activities that your organisation undertook in 2013. Please leave blank those activities that your organisation did not undertake in 2013.

- ☐ Advocacy/lobbying
- ☐ Advising on government policy
- ☐ Raising profile for jazz within your country
- ☐ Raising profile for jazz internationally
- ☐ Festival
- ☐ Other own-promoted concerts (i.e. concerts which your organisation promotes and takes financial responsibility for)
- ☐ Venue management
- ☐ New arts commissions (e.g. new compositions)
- ☐ Recordings
- ☐ Professional development schemes, workshops and events
- ☐ Education, learning and participation activities
- ☐ Conferences and seminars
- ☐ Networking events
- ☐ Advice
- ☐ Library
- ☐ Archive
- ☐ Database/other information resources
- ☐ Research
- ☐ Music publishing

2. Approximately what % of your organisation's time and resources (i.e. including expenditure and personnel) was spent specifically on jazz in 2013?

%

5. Personnel

In this section of the questionnaire, we will be asking you to calculate the number of FTEs in your organisation. Calculating the number of FTEs (or full-time equivalent staff) employed in your organisation is a standard way of benchmarking the total hours worked by your staff, and allows us to represent accurately the totality of your workforce, including part-time and temporary staff. (For example, many members may have a mixture of full-time and part-time year-round staff, as well as temporary staff to support festivals and events.) The table below gives some guidance as to how you can calculate the FTEs in your organisation - the starting point of 'full-time' is relative to your organisation: for example, if a full-time member of staff in your organisation is contracted to work 40 hours per week, then this would equal 1 FTE, and all other calculations should be made in relation to this.

1 full-time member of staff, employed year-round = 1 FTE
1 part-time member of staff, working 1 day per week = 0.2 FTE
1 part-time member of staff, working 2 days per week = 0.4 FTE
1 part-time member of staff, working 2.5 days per week = 0.5 FTE
1 part-time member of staff, working 3 days per week = 0.6 FTE
1 member of temporary staff, working 1 week per year = 0.02 FTE
1 member of temporary staff, working 2 weeks per year = 0.04 FTE
1 member of temporary staff, working 3 weeks per year = 0.06 FTE
1 member of temporary staff, working 1 month per year = 0.08 FTE
1 member of temporary staff, working 2 months per year = 0.17 FTE
1 member of temporary staff, working 3 months per year = 0.25 FTE
1 member of temporary staff, working 6 months per year = 0.5 FTE

Example: if you have 5 full-time staff working year round ($5 \times 1 = 5$ FTE) plus 3 half-time staff working year round ($3 \times 0.5 = 1.5$ FTE) plus 20 staff working for 2 weeks per year ($20 \times 0.04 = 0.8$ FTE) you employ a total of 7.3 FTE.

1. How many FTE paid staff did your organisation employ in 2013? Please state how many FTE paid staff worked for your organisation in 2013, using the boxes below to calculate the total. Use the table above for reference if necessary. Please do not count volunteers, internships or trainees - please complete questions below for these.

Number of full-time staff	<input type="text"/>
FTE equivalent of full-time staff	<input type="text"/>
Number of part-time year-round staff	<input type="text"/>
FTE equivalent of part-time year-round staff	<input type="text"/>
Number of temporary staff	<input type="text"/>
FTE equivalent of temporary staff	<input type="text"/>
TOTAL FTE FOR 2013	<input type="text"/>

2. In addition, how many other people work for your organisation voluntarily?

On the board (voluntary board members only)	<input type="text"/>
As unpaid volunteers (excluding the board, above)	<input type="text"/>

3. Approximately how many volunteer days in TOTAL were given to your organisation in 2013 by these volunteers?

Volunteer days

4. If you have volunteers, of this total volunteer time per year, please estimate the % of time given in the following capacities:

Professional or managerial % (e.g. board members, higher administrative or technical support)

Manual or unskilled % (e.g. stewarding, basic administrative support)

5. IN ADDITION to the paid staff and volunteer numbers given above, in 2013 how much use did your organisation make of student trainees or internships (i.e. staff working either full or part time for expenses, in exchange for relevant training or experience), expressed in FTEs?

6. Including paid staff and volunteers, please indicate the % gender balance in your organisation:

Male %

Female %

6. Finances: Income

1. We are collecting data on the financial year which began in 2013. When completing the questionnaire, please use verified and final information from your audited accounts where possible. Please indicate the exact financial year to which your answers relate (tick one box only):

If 'other', please insert your financial year dates:

2. In which currency does your organisation operate?

All answers in the questionnaire must be given in € Euros. If your operating currency is not the Euro, please use the following exchange rates to convert your currency to the Euro:

Bosnian convertible marka 1.95583 = €1

Czech koruna 25.98 = €1

Danish krone 7.4579 = €1

Hungarian forint 296.87 = €1

Icelandic krona 162.206675 = €1

Lithuanian litas 3.4528 = €1

Macedonian denar 61.755079 = €1

Norwegian krone 7.8067 = €1

Polish zloty 4.1975 = €1

Romanian leu 4.419 = €1

Russian rouble 42.337 = €1

Serbian dinar 113.0774 = €1

Swedish krona 8.6515 = €1

Swiss franc 1.2311 = €1

Turkish lira 2.5335 = €1

UK pound sterling 0.84926 = €1

3. Please give the total income of your organisation (i.e. the WHOLE organisation which is a member of EJV, including all non-jazz and commercial income), to the nearest € Euro, during the 2013 financial year:

€

4. Of this total annual income in 2013, please state in € Euro how much you received from the following sources (N.B. this may not add up to 100% of your income for 2013):

European Union funding

National government

Regional/local government or regional/local authority

Other public funding (e.g. Arts Council or similar body)

Commercial business sponsorship

Individual giving (including donations, personal endowments and legacies)

Trusts and charitable foundations (excluding grants/financial support from authors/performing rights organisations)

Grants/financial support from authors/performing rights organisations

Embassies and cultural export bureaux

Ticket sales

Membership fees (i.e. if you are a membership organisation - please do not double-count income from individual donations here)

Income from hiring your venue

Income from other merchandise

Consultancy work

Income from Higher Education/University institutions

7. Finances: income ctd.

1. Please state in € Euro how much in-kind support you received in 2013 (e.g. including the value of volunteer time, in-kind support through venue hire, media support or other in-kind sponsorship):

2. Please state your total income in € Euro from 2011

3. Please state your total income in € Euro from 2012

4. If known, please state your total income in € Euro from 2014 (please include an asterisk * next to the figure if the figure is not yet verified and final)

5. Looking at the changes in your organisation's income from 2011 - 2014, please indicate how much impact the following factors had on your income during this period:

	Large impact	Small impact	No impact	Not applicable
Change in grant income	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Change in ticket income	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Change in sponsorship	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Change in organisational focus or activity	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Change in organisational efficiencies (e.g. staffing, communications or finance)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
One-off changes (e.g. a specific organisational change which is unlikely to happen again)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

8. Finances: Expenditure

1. Please give the total expenditure of your organisation (i.e. the WHOLE organisation which is a member of EJJ, including all non-jazz and commercial expenditure), to the nearest € Euro, in 2013:

€

2. Of this total annual expenditure in 2013, please state in € Euro how much you spent on the following areas (please do not double count expenditure by including the same expenditure in two different categories - if you are unsure about the definitions, please get in contact. Please note also that this may not add up to 100% of your expenditure for 2013):

Artists' performance fees for your own-promoted concerts and events (including taxes)

New arts commissions (e.g. new compositions) - please specify details below

Venue hire for your own-promoted concerts, events and recordings

Technical/production costs for your own-promoted concerts, events and recordings

Staff salaries

Office overheads (office rent, administration and stationery)

Recordings

Advertising through social media

Marketing, publicity, advocacy and lobbying

Research (e.g. audience research - not programming-related research expenditure)

Artists' development schemes, workshops or events (e.g. artists' professional development, such as Serious' Take Five scheme or Young Nordic Jazz Comets)

Education, learning and participation activities

Grant funding of your national musicians/ensembles for national tours

Grant funding of your national musicians/ensembles for international tours

Other grant funding (e.g. for clubs, venues and festivals)

3. Please give further details of the new arts commissions (e.g. new compositions) expenditure that your organisation made in 2013:

9. Economic impact

1. Looking at your total expenditure in 2013, what % did you spend in these different geographical areas (please remember to include major expenditure items, such as staffing - do your staff live locally? - artists' fees, subcontractors and venue hire):

Internationally (N.B. only count international artists' fees if they are paid directly to international artists - if they are paid to a national agent, count this as national expenditure)

Nationally (within your country but more than 30 minutes' journey time from your organisation base or main venue)

Locally (within a 30 minute journey time of your organisation base or main venue)

2. Do you have any data on secondary expenditure by audiences at your events in 2013 (i.e. expenditure by your audiences on items whilst attending your events in addition to tickets, such as travel, accommodation, food etc)?

☐ Yes

☐ No

If yes, please give details (e.g. additional spend per visitor in € Euro, or ratio/multiplier if known)

3. In 2013, how far did your audiences travel to attend your events? If known, please state the % of those who were local (i.e. did not require overnight accommodation) and those who were visitors requiring overnight accommodation:

Local %

Visitors %

4. If known, what proportion of your overall audience in 2013 was international?

10. Research resources

1. Has your organisation conducted any relevant research since 2012 (e.g. audience research, economic impact study, other impact study, mapping or benchmarking work), or participated in a similar programme of research in collaboration with others?

☐ Yes

☐ No

If yes, please give details below. If you would be happy to share this research with the EJV, and for it to feature as part of the EJV's research programme, please send a copy to fiona.goh@virgin.net. Research will only be quoted or used with agreement from you.

2. Do you have access to recent and reliable national data on jazz in your country (e.g. numbers of festivals, dedicated jazz venues, individual musicians, groups, large ensembles, record labels, periodicals, websites, radio airtime and third level/Higher Education jazz institutions) which you would be willing to share with EJV?

☐ Yes

☐ No

If yes, please give details of the type of data you could share:

11. Are you a membership organisation?

1. There is a broad range of organisational members within EJA. We are keen to obtain more data on those organisations that are themselves membership organisations, i.e. those organisations that, perhaps in addition to having a role as the national organisation for jazz in their country, also attract and service their own members.

Do you consider yourself to be a membership organisation?

☐ Yes

☐ No

12. Membership organisations only

1. What membership fees in € Euro did you charge in 2013?

2. Please indicate below the number of members you had in each of the following categories in the 2013 financial year:

Individual musicians

Musical groups or ensembles

Venues

Festivals

Other promoters

Journalists

Other (please see below)

3. If you chose 'Other', please give more details about this type of member:

13. Audiences

1. Do you promote your own events? (i.e. events that you take the financial responsibility for?)

☐ Yes

☐ No

14. Audience data

1. How many events in total did your organisation promote in 2013? (N.B. this should include all concerts, showcases, workshops and events of your own promotion, including jazz and non-jazz events)

No. of events:

2. And of these events, how many were abroad?

No. of events abroad:

3. How many of your events in 2013 were free to attend (i.e. at no cost to the audience)?

No. of free events:

4. What size audience did you achieve at your events in the 2013 financial year? Please indicate audience numbers in each of the following categories, as relevant.

Tickets sold for multi-stage events where 1 ticket = 1 audience member

Individual event tickets sold (in addition to the above)

Audience numbers for free events

Audience numbers for other non-ticketed events (in addition to the above)

TOTAL AUDIENCE FOR 2013 EVENTS

5. In addition, how many participants engaged in your events in 2013 (e.g. in workshops, outreach projects or professional development activities)?

6. What data do you hold on audiences from 2013 (please tick all that apply)?

- ☐ Name
- ☐ Mobile telephone number
- ☐ Postal address
- ☐ E-mail address
- ☐ Gender
- ☐ Age
- ☐ Booking profile (e.g. how many or what types of events they have attended)
- ☐ Other data (please specify below)

If you answered 'other', please give more details:

7. For the events that you promoted in 2013, please indicate where the artists came from (please note - if you promoted an ensemble of mixed origin, please refer to the leader of the ensemble; if they were born in Europe, count this as a European ensemble):

National %

Non-national but European origin %

Musicians from outside Europe % (i.e. the individual or ensemble leader was not born in Europe)

15. Online audiences and artists' mobility

1. Please tell us about your online audiences in 2013:

Number of website page
views

Number of Twitter
followers

Number of Facebook
likes

Number of Google +
followers

2. Does your organisation fund or promote national jazz artists through touring, showcases or other promotional activities?

☐ Yes

☐ No

16. Promotion of national artists

1. Does your organisation offer funding for national jazz artists (i.e. artists who are based in your own country) to perform or tour ABROAD?

☐ Yes

☐ No

17. Foreign touring support details

1. If yes, how many national jazz artists and performances did you support in this way in 2013? (Please count each individual artist - e.g. if a group has five national artists, please count this as 5 in total)

No. of artists funded to perform/tour ABROAD:

No. of performances in 2013

2. Does your organisation offer funding for national jazz artists (i.e. jazz artists who are based in your country) to perform or tour IN YOUR OWN COUNTRY?

☐ Yes

☐ No

18. National touring support details

1. If yes, how many national jazz artists and performances did you support in this way in 2013? (Please count each individual artist - e.g. if a group has five national artists, please count this as 5 in total)

No. of artists funded to perform/tour IN YOUR OWN COUNTRY:

No. of performances

2. Did your organisation facilitate any international exchange programmes for groups or individual musicians in 2013?

☐ Yes

☐ No

If yes, please give details:

19. Showcases

1. Did you organise a showcase in 2013?

☐ Yes

☐ No

20. Showcases

1. If yes, please indicate the numbers of attendees from the following groups:

International artistic directors or promoters (not from your own country)

International journalists (not from your own country)

Other international attendees (please specify who below)

2. Please tell us more about the other international attendees who attended your showcases in 2013:

3. In what ways did you promote national artists in 2013? Please tick all that apply:

- ☐ CDs
- ☐ DVDs
- ☐ Dedicated websites
- ☐ Showcases
- ☐ Presence at trade fairs or industry events (such as JazzAhead)
- ☐ Other (see below)

If you ticked 'Other', please give details:

21. Case studies

1. Would you be willing to participate further in the research process, by contributing to a case study?

Last time, the research featured a broad range of case studies about artistic programming, audience development, advocacy/lobbying, and artists' professional development. This time, this might include additional areas such as collaborative work, sustainability, education, cultural heritage, community cohesion, cross-sectoral work etc. We are also interested in hearing about the most productive outcome of your membership of the EJNI in the last 3 years. This is a great opportunity to showcase the work of your organisation both to the wider membership and the EU - if you might be interested, please give details of the project(s) that you would be willing to be interviewed about:

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22. Thank you!

Thank you - the questionnaire is now complete. If you wish to review your responses or have incomplete or missing answers that you need to edit or complete, you can simply return to the questionnaire later by pressing 'exit this survey' and return to it again by clicking on the same e-mail link to the survey. Please remember to complete all your responses by FRIDAY 15 MAY 2015.

If you have finished the survey, simply press 'Done' and your questionnaire will be submitted to EJN.

1. If you have any further comments you would like to give, or would like to give feedback on the survey, please use the comments box below. Thank you.



APPENDIX 2:

SHORT QUESTIONNAIRE

EJN 2015 research - key questions for non-respondents

Your organisation name: _____

1. Approximately what % of your organisation's time and resources (i.e. including expenditure and personnel) was spent specifically on jazz in 2013? _____
2. How many FTE staff did your organisation employ in 2013?ⁱ Please state how many FTE paid staff worked for your organisation in 2013, using the boxes below to calculate the total. Use the table below for reference if necessary. N.B. Do not count volunteers, internships or trainees.

Number of full-time staff	_____
FTE equivalent of full-time staff	_____
Number of part-time staff	_____
FTE equivalent of part-time staff	_____
Number of temporary staff	_____
FTE equivalent of temporary staff	_____
TOTAL FTE FOR 2013	_____

3. Please give the dates of your **financial year** in 2013: _____
4. Please give the total **income** of your organisation (i.e. the **WHOLE** organisation which is a member of EJN, including all non-jazz and commercial income), to the nearest € Euro, during the 2013 financial yearⁱⁱ: _____
5. If known, please state your total **income** in € Euro from **2014**: (Please include an asterisk* next to the figure if this figure is not yet verified and final) _____
6. Please give the total **expenditure** of your organisation (i.e. the **WHOLE** organisation which is a member of EJN, including all non-jazz and commercial expenditure), to the nearest € Euro, in 2013: _____
7. Of this total expenditure in 2013, please state in € Euro how much you spent on the following areas:

Artists' performance fees for your own-promoted concerts and events (including taxes)	_____
New arts commissions (e.g. new compositions)	_____
Artists' development schemes (artists' development schemes, workshops or events (e.g. artists' professional development, such as Serious' Take Five scheme or Young Nordic Jazz Comets)	_____

8. How many **events** did your organisation promote in the 2013 financial year? (N.B. this should include all concerts, showcases, workshops and events of your own promotion and jazz and non-jazz events) _____
9. How many of your events in 2013 were **free** to attend (i.e. at no cost to the audience)? _____
10. What size **audience** did you achieve at your events in the 2013 financial year? Please indicate audience numbers in each of the following categories, as relevant.

Tickets sold for multi-stage events where 1 ticket=1 audience member	_____
Individual event tickets sold (in addition to the above)	_____
Audience numbers for free events	_____
Audience numbers for other non-ticketed events (in addition to the above)	_____
TOTAL AUDIENCE FOR 2013 EVENTS	_____

Notes:

ⁱ How to calculate FTEs:

In question 2, we asked you to calculate the number of FTEs in your organisation. Calculating the number of FTEs (or full-time equivalent staff) employed in your organisation is a standard way of benchmarking the total hours worked by your staff, and allows us to represent accurately the totality of your workforce, including part-time and temporary staff. (For example, many members may have a mixture of full-time and part-time year-round staff, as well as temporary staff to support festivals and events.) The table below gives some guidance as to how you can calculate the FTEs in your organisation - the starting point of 'full-time' is relative to your organisation: for example, if a full-time member of staff in your organisation is contracted to work 40 hours per week, then this would equal 1 FTE, and all other calculations should be made in relation to this.

1 full-time member of staff, employed year-round = 1 FTE
1 part-time member of staff, working 1 day per week = 0.2 FTE
1 part-time member of staff, working 2 days per week = 0.4 FTE
1 part-time member of staff, working 2.5 days per week = 0.5 FTE
1 part-time member of staff, working 3 days per week = 0.6 FTE
1 member of temporary staff, working 1 week per year = 0.02 FTE
1 member of temporary staff, working 2 weeks per year = 0.04 FTE
1 member of temporary staff, working 3 weeks per year = 0.06 FTE
1 member of temporary staff, working 1 month per year = 0.08 FTE
1 member of temporary staff, working 2 months per year = 0.17 FTE
1 member of temporary staff, working 3 months per year = 0.25 FTE
1 member of temporary staff, working 6 months per year = 0.5 FTE

Example: if you have 5 full-time staff working year round ($5 \times 1 = 5$ FTE) plus 3 half-time staff working year round ($3 \times 0.5 = 1.5$ FTE) plus 20 staff working for 2 weeks per year ($20 \times 0.04 = 0.8$ FTE) you employ a total of 7.3 FTE.

ⁱⁱ All answers in the questionnaire must be given in € Euros. If your operating currency is not the Euro, please use the following exchange rates to convert your currency to the Euro:

Bosnian convertible marka 1.95583 = €1
Czech koruna 25.98 = €1
Danish krone 7.4579 = €1
Hungarian forint 296.87 = €1
Icelandic krona 162.206675 = €1
Lithuanian litas 3.4528 = €1
Macedonian denar 61.755079 = €1
Norwegian krone 7.8067 = €1
Polish zloty 4.1975 = €1
Romanian leu 4.419 = €1
Russian rouble 42.337 = €1
Serbian dinar 113.0774 = €1
Swedish krona 8.6515 = €1
Swiss franc 1.2311 = €1
Turkish lira 2.5335 = €1
UK pound sterling 0.84926 = €1

APPENDIX 3:

RESEARCH POPULATION

The following members were eligible to participate in the research process. * indicates those members who did not return a questionnaire, and ** indicates those who participated in the case studies only. Members in bold participated in the original Strength in Numbers study. The overall response rate was calculated on those respondents who participated in the questionnaire (either short or full) as a proportion of the total number of eligible members at the time the research project was launched.

Association Jazzé Croisé

Akbank Jazz Festival / Pozitif Live

Annamaija Music Company

April Jazz Espoo/Espoo Big Band

Apulia Jazz Network*

ArtMania Production Ltd*

Association Paris Jazz Club*

Associazione Catania Jazz*

Banlieues Bleues

Belgrade Jazz Festival*

Bimhuis - Stichting Jazz

Bohemia Jazz Fest**

Bucharest Jazz Festival*

Budapest Music Center (bmc)

Bujoart/Moravia Music Fest

Cankarjev dom

Casa del Jazz*

Cheltenham Festivals Ltd

Copenhagen Jazz Festival*

DSI Swinging Europe

Enjoy Jazz

Esse Jazz Club*

Estonian Jazz Union (Eesti Jazzliit)

Fasching*

Finnish Jazz Federation (Suomen Jazzliitto)

Flanders Arts Institute

Fondazione Musica per Roma*

Fundação Casa da Musica

Gaume Jazz Festival*

Glasgow International Jazz Festival

Gyula Castle Jazz Festival*

Handelsbeurs Concert Hall
(Noordstarfonds vzw)

Huddersfield Contemporary Music Festival (hcmf)*

I-Jazz**

Improvised Music Company

Izmir European Jazz Festival

Jazz & the City Salzburg*

Jazz Banat Cultural Foundation*

Jazz en Muziek - Gent Jazz Festival

Jazz Network

Jazz North

Jazz Services Ltd.*

jazzahead!

Jazzclub Unterfahrt

JazzDanmark

JazzFest Berlin*

Jazzforeningen Nefertiti*

Jazzkaar Festivals

Jazztopad Festival/National Forum of Music**

Katowice JazzArt Festival

Kaunas Jazz Club

Kongsberg Jazzfestival*

Kultur i Väst*

LantarenVenster

Maijazz

Marseille Jazz des Cinq Continents

Mediawave International Film and Music Festival

Midtnorsk Jazzsenter (MNJ)

Molde International Jazz Festival

Music Information Centre Austria (MICA)

music:LX

Musica sulle Bocche*

Na'Conxypan Civic Association

Nasjonal jazzscene

Nattjazz Festival

Nederlands Jazz Archief (Dutch Jazz Archive)

Norsk Jazzforum

North Sea Jazz Festival

Orchard Media and Events Group/
Brecon Jazz Festival

Oslo Jazz Festival

Otranto Jazz Festival*

Palatia Jazz Festival

Puglia Sounds*

Raahen Rantajatsit Jazz on the Beach Festival

Reykjavik Jazz Festival *

Rigas Ritmi Festival*

Roma Jazz Festival*

Sage Gateshead

Schaffhauser Jazz Festival*

Serious

Sibiu Jazz Festival Foundation*

Sildajazz - Haugesund International Jazz Festival*

Skopje Jazz Festival *

Sons da Lusofonia

Stadtgarten Jazzhaus/Moers Festival **

Svensk Jazz

Tam Tutta Un' Altra Musica - Eventi SCRL

Tampere Jazz Happening

Trondheim Jazzfestival

Turner Sims

Udruzenje Jazz Fest Sarajevo

Umeå Jazz Festival

Umbria Jazz Festival*

UMO Jazz Orchestra

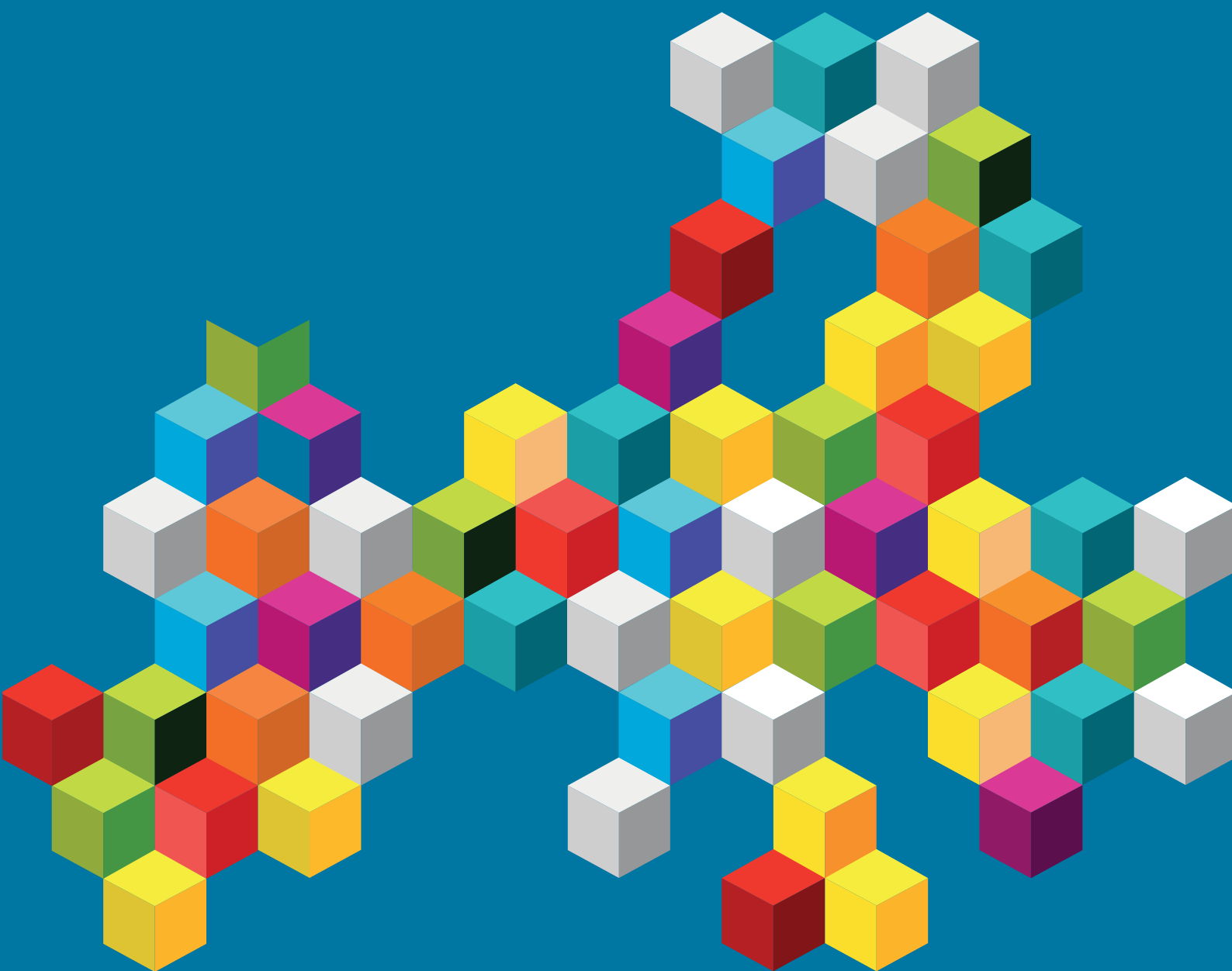
Vestnorsk Jazzsenter

Vilnius Jazz Festival*

Vossa Jazz

Wallonie-Bruxelles Musiques

Womex/Piranha Arts*



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