

Researching the Scottish Jazz and Blues Scenes (2019-2022)

Sectoral challenges and proposals for growth and sustainability



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Summary

In this report we examine the Scottish jazz and blues community through its constituent membership: musicians, educators, festival and concert promoters, and audiences; and those who support the scene economically. We trace the talent pipeline of Scottish musicians through formal and informal education to professional development opportunities, interrogate the role, function and social responsibilities of festivals, map the festival audience, and explore the underlying economies that support the scene.

The underpinning three-year research project in partnership with Edinburgh Jazz & Blues Festival (EJBF) and on behalf of its stakeholders was made possible through funding provided by the Scottish Government / City of Edinburgh Council's PLACE scheme. Commencing in October 2019, the project aimed to create a summative roadmap for future sectoral growth and sustainability informed by a deeper understanding of the status quo. In common with most, the project team had not anticipated the emergence of a global health pandemic less than six months into the research. Sectoral *growth* became increasingly framed as *survival* as the livelihoods of musicians and opportunities for promoters and concert-goers were decimated by social distancing measures imposed in March 2020 in response to the rapid spread of COVID-19. As society at large responded to the pandemic by moving its social and commercial interactions online, many in the musician community similarly adapted by offering instrumental tuition via video conferencing and by streaming home concerts to virtual audiences. Festivals offered first digital and later hybrid programmes, relying initially on pre-recorded content before commissioning new materials for live, real-time broadcast. The vast majority of other music promoters and venues were forced to suspend operations.

At the time of writing, we appear to be moving into a new phase of living alongside the virus, with most restrictions lifted and first steps being taken towards a cautious return to a semblance of pre-pandemic normality. It must be acknowledged, however, that not all musicians' careers were sufficiently robust to weather the storm of the past two years with many having to seek alternative interim employment and some subsequently not returning to music for employment. Similarly, a number of venues that presented jazz and blues have not reopened their doors following the easing of restrictions, whether for economic reasons or due simply to fatigue. As with society at large, the pressures on mental wellbeing for those within the jazz and blues community were significant and we are now only beginning to witness a gradual repair to both wellbeing and careers.

Jazz represents a vital and valued strand within Scotland's rich and varied cultural tapestry. Since the music's arrival during the first half of the twentieth century, a loyal and enthusiastic community of musicians, concert promoters, educators and fans has collectively safeguarded its heritage and identity while championing its evolution and renewal. Over the intervening years, Scotland's jazz scene has provided the soundtrack for changing times. From trad, mainstream and bop of the 1950s and 60s, free jazz and fusion of the 1970s and 80s, to a cross-generational and stylistically eclectic scene for the new millennium, jazz draws influence equally from the music's transatlantic history and from wider contemporary culture. Currently, a new generation of young musicians, many of whom have benefited

from burgeoning opportunities in formal and informal jazz education, have come to the fore, matching their peers across the UK and overseas in musical ability and innovation. Alongside the advent of jazz education over the past 20 years, the scene has become increasingly professionalised with a growing number of musicians aspiring to earn their living, or at least a significant part thereof, from playing and teaching jazz.

In Scotland, jazz and blues are performed on the stages of the country's urban and rural festivals, concert-halls, clubs and pubs, with year-round opportunities for musicians and fans to come together in celebration and appreciation. Supported variously by funding from national, regional and local bodies, the jazz community is recognised as an important contributor to the Scottish cultural sector and, chiefly through its festivals, to the country's tourism industry. Through export initiatives such as *jazzahead* and promoter and musician networking, a number of Scottish jazz musicians reported benefits from opportunities to present and promote Scottish culture on the international stage.

Yet, as this report goes on to demonstrate, the national jazz ecosystem is built on fragile foundations with limited infrastructure or collective strategy to support it. Despite past and best efforts, there remains a lack of organisational framework through which to coherently consolidate and grow Scotland's jazz scene. Furthermore it is clear that, although supported by public funding, the scene is built and sustained in many cases through the tireless enthusiasm of its fans, volunteer concert promoters, and the precarious and insecure working conditions of its musicians. A mixed methods research approach was taken via interviews and focus groups conducted by the project research team, to harness in-depth insights and to better understand challenges and barriers facing musicians and promoters. The complexities in the interdependencies between the various stakeholders within the scene are highlighted from which a recommendation for transformation and growth is proposed. Growth, for the purposes of this report, is applied to encompass both economic and cultural capital and the recommendation set out should not be followed as a guaranteed route to success in either respect. Rather, it represents a considered and reflective response to data gathered.

Key Findings

Scotland's jazz and blues ecosystem is built on fragile economic foundations with limited evidence of infrastructure or collective strategy to support it.

At the time of writing there is no coherent, cross-sectoral organisational framework through which to consolidate and grow Scotland's jazz scene.

Scottish jazz and blues have yet to demonstrably adequately reflect gender balance on stage, an issue cited in interviews with stakeholders as having a negative impact on both cultural relevance and sectoral growth of jazz and blues.

Significant and pervasive tensions were voiced by interview respondents in relation to differing musician/promoter expectations with regard to professionalism, operational transparency, strategic vision, cultural gatekeeping and identity construction.

Impacts of COVID-19

COVID-19 rapidly laid bare pre-existing fragilities and fault lines within the jazz and blues ecosystem and highlighted musicians' reliance on live performance as a key income stream and means of engaging with the scene.

The majority of small promoters and venues were forced to close for all or much of the first two years of the pandemic and, coupled with the cancellation of weddings and corporate engagements, musicians were left bereft of a significant proportion of their earned income.

Continued public funding through COVID-19 recovery grants allowed festivals to be the organisations best able to support the wider scene during pandemic restrictions, providing degrees of cultural continuity and community cohesion. Venues and creative freelancers could also apply for Culture Organisations and Venues Recovery Fund which aimed to provide critical support and help to reduce the threat of insolvency, protect jobs and create conditions for a more viable and sustainable future for the sector.

The speed at which festivals responded to the pandemic in implementing new online and hybrid platforms for live performance maintained a degree of creative momentum for the scene whilst providing essential employment, creative focus and extending audience reach and profile. Festivals struggled, however, to monetise this activity and production of content carried additional cost.

Stakeholders interviewed voiced a desire to reflect on prevailing sectoral issues and to explore new directions for jazz and blues in post-pandemic contexts. Rather than simply wishing for a return to 'normal', the musicians that were interviewed for this project widely recognised that the pre-pandemic scene was far from problem-free and that the sector now has the opportunity to review and reset through innovating and integrating new models of performance, dissemination and monetisation.

Musician Experiences

Scottish jazz and blues musicians typically draw on a range of income streams, with live performance (50%) and music teaching (30%) being the most significant.

Performance fees for jazz and blues musicians in Scotland are generally low when compared to those of other genres, although this varies significantly in relation to venue and type of gig. It should be noted that rates of pay vary between performances on home or touring circuits with novelty generally attracting a higher fee.

Jazz and blues musicians often balance financial return with cultural rewards – such as the opportunity to platform new work, gain access to professional development and networking opportunities, develop new audiences, personal enjoyment, wellbeing and creative purpose – in evaluating/accepting various types of gig offers.

Musicians reported a pervasive mistrust in, variously, their peers, promoters, festivals, the education sector and funders, citing the competitive and protectionist nature of a small national scene. Lack of trust and respect were widely cited as a fundamental barrier to the growth and sustainability of the sector.

Musicians reported a diminishing of intergenerational mentoring and, by extension, a developing generational divide due chiefly to the lack of a coherent performance network, unstable pay conditions and the more recent impacts of COVID-19.

According to musicians interviewed, low pay is not being queried or reported to the Musicians' Union (MU) as reporting is not anonymised.

Significant industry-related skill gaps were voiced within the jazz and blues musician community seen as posing barriers across a number of areas, that include applying for funding, professional networking, the production of marketing and promotional materials, and press relations.

Scottish jazz and blues musicians are heavily reliant on the largely seasonal opportunities that Scotland's urban and rural festivals provide for professional platforming and in the presentation of original work.

Scottish jazz and blues musicians reported that gig and touring opportunities were limited, especially for the presentation of original work. This was variously attributed to the lack of a national touring infrastructure, the scarcity of dedicated jazz venues, often low box office returns, the paucity of booking agents, managers and relevant national record labels, and the increasingly prohibitive post-Brexit costs and bureaucracy of touring in mainland Europe.

Festivals and Promoters

Scotland's jazz and blues festivals were seen to provide essential focus and continuity in the professionalisation of the country's musicians, through the commissioning of new work, by helping to build domestic and international audiences for artists, and in providing pathways to international collaboration.

Due to the lack of wider sectoral infrastructure, responsibilities for talent development were observed as falling disproportionately to larger publicly funded festivals, often as a distraction and additional burden to typically small and overstretched production teams.

Within the limitations of programming and economic models, venues such as The Jazz Bar and Whighams Jazz Club (Edinburgh), The Blue Arrow (Glasgow)¹, Jazz at the Blue Lamp (Aberdeen) and a small number of others were perceived as contributing significantly to the health of the scene through musician and audience development, and in strengthening the identity and reputation of Scottish jazz.

Conversely, musician-interviewees suggested that a non-ticketed and unregulated pub scene has led to a progressive economic devaluation of jazz over a number of decades with musician fees remaining at best static and in many cases falling. Pub and club gigs often present the same performers as festivals, leading to an audience-based value discrepancy that festival organisers reported as often difficult to resolve.

Informal methods of musician-led concert promotion and a lack of targeted marketing expertise were seen to result in many smaller gigs being invisible to both new audiences and visiting musicians.

Younger generation musicians reported that jazz gigs promoted at non-jazz venues were perceived as increasing access and encouraging new and more diverse audiences.

¹ The Blue Arrow jazz club announced its permanent closure on 17th October, 2022.

Audience

The jazz and blues festival audience that responded to survey for this report is ageing (82.85% over the age of 55) and the under 35 audience is small (2.65%).

The surveyed jazz and blues festival audience remains male dominated (65.78% of respondents identified as men), with a significant gender imbalance evident in the blues audience (rising to 80% men).

Encouragingly, the surveyed audience under the age of 45 was gender-balanced, with 51% identifying as women, offering some encouragement regarding inclusivity in future audiences. .

No generational or gendered patterns in relation to jazz sub-genre preferences were evident amongst the audience members surveyed.

Jazz is primarily performed in licensed premises, thereby typically excluding under 18s.

Sectoral Funding

Scottish jazz and blues musicians and organisations are underrepresented in applications for national industry funding pots, turning instead to Creative Scotland as their primary (and sometimes only) funder. Limited success and skill was seen in applying for other grants and fundraising activities.

Jazz, blues and improvised music applications as a whole receive a healthy percentage of the Creative Scotland Open Fund music budget, despite numbers of applications being lower than other genres (reflecting perhaps the relative size of the scene).

The greater part of Creative Scotland funding reaches the scene through organisations which experience a higher level of application success.

Yearly funding cycles for festivals were seen as a barrier to longer term strategic development for the festivals and thereby the development of the scene.

Creative Scotland data highlighted that jazz, blues and improvised music applications by individuals to the Open Fund have a lower application success rate than the average success rate (38%) for all Open Fund applications submitted by individuals and organisations across all genres, suggesting that musicians continue to require additional support in developing successful bids.

Formal and Informal Jazz Education

Key individuals were seen to be driving jazz and blues education in Scotland. These included those working within Further and Higher Education and enthusiasts providing informal educational opportunities for the sector.

Youth and regional big bands, again often run by enthusiasts, were seen to offer a vital resource for training and experience amongst younger and developing musicians.

Wider issues with music provision across primary, secondary and tertiary education were reported, in light of cuts to funding, teacher confidence and the impact of COVID-19 on practical music making in schools.

Only one Scottish HE institution, Royal Conservatoire of Scotland, currently offers specialist jazz undergraduate and postgraduate degrees, although others provide elements of jazz studies as part of a broader offer.

Research Insights

The insights that follow are based upon data gathered during interviews, online surveys, virtual focus groups, and stakeholder meetings which were undertaken in person in October 2019 and February 2020, and virtually in December 2021 and February 2022. Thirty-five individual interviews were undertaken with musicians, festival professionals and promoters, jazz educators, and funders in person in late 2019/early 2020 and then virtually as the national lockdowns commenced. Musician surveys were circulated via direct email to 200 and a link via online platforms to the community at large, in April 2020 (5 respondents) and March 2021 (17 respondents). An audience survey circulated via the EJBF database was also completed in early 2021 (1,020 respondents). Finally, notes from three virtual focus groups and the four stakeholder meetings also contributed to our findings and final recommendations. All names provided within this document are pseudonyms unless otherwise stated. Pronouns and age have also been included in order to provide an intersectional insight into the issues facing the contemporary Scottish jazz and blues scene.

Musicians

This section draws upon interviews with twenty Scottish musicians, three roundtable events (undertaken in October 2019, February 2020, and February 2022, that included approx. 90 attendees in total), and two musician surveys. In order to include diverse voices, a balance of age, experience, sub-genre, gender, location and instrument amongst interviewees was considered. Most musicians interviewed performed across genre boundaries, to include jazz, and with players from outside the scene as well as in. They therefore reflected upon these experiences as a comparative base to critique the Scottish jazz scene. The key issues of focus are: musician income; perceptions of jazz in Scotland and access to the scene; musician skill gaps; and the impact of the COVID-19 pandemic.

Musician Income

All musicians interviewed were asked about the various streams of earnings which contribute to their annual income. To provide an additional level of detail, a musician survey was also circulated and 22 surveys were completed. However, only ten respondents were comfortable sharing details on how much money they earned through each stream, despite the surveys being fully anonymised. Reflecting the reluctance of the sector to share financial information, this data can therefore only be considered as an indicative snapshot of musician income.

The majority of musicians interviewed and surveyed balanced their performance income with music teaching, the precarious nature of gigging supplemented by teaching as a more “solid and reliable” source of income, potentially making buying property or a car possible and offering some degree of financial stability. For those musicians surveyed, **live performances offered at least 50% of their annual income**, and **on average 30% was made through teaching** (private tuition, tertiary education and ad hoc workshops). **Only one musician reported a significant revenue from physical album sales** (male, 23 – 11%), and **only two from royalties** (PRS, MCPS, PPL). **Download sales and digital streams continue to**

offer very low returns. In her interview, Rachel (40s) said that she viewed physical albums as a “record” of the work that she produces, rather than as a source of income. Equally, CDs are produced for tours or festival gigs, and she does not see a return on investment. As will be considered later in this section, music videos are now doing the promotional work that physical albums used to do, requiring a new skill set and network from current jazz musicians. Royalties were discussed by more knowledgeable musicians, and the difficulty of capturing radio play and live performance for PRS (Public Rights Society) royalties was also noted. Interviews with musicians in 2022 indicated that royalty payments (PRS/PPL) have been significantly impacted upon by the pandemic, particularly with the long term closure of venues playing recorded music.

Musician interview data suggests that jazz and blues performance fees in Scotland are modest in relation to those of other music genres, although this is often directly related to potential audience sizes and varies in relation to the venue and the type of gig. However, many of the musicians interviewed balance the monetary value and the musical value of gigs when organising their performance time. Daniel (50s) argued that musicians continue to be unsupported by a “weak Musicians’ Union”. Low pay is not being reported as reporting is not anonymised. The fear of bad blood with venues and promoters therefore means that musicians are not querying low pay or reporting it to the Musicians Union (MU). In his experience of working with musicians beyond jazz, Craig (40s) noted that the rate of pay is higher for classical and trad (folk) musicians (as backed up by promoters during the March 2020 focus group session). Jazz promoters and festival professionals interviewed noted that their rates of pay were based on MU rates although musicians indicated that bringing a new creative product to the stage generally took significantly more time to prepare than they were paid for.

This low rate of pay impacts upon collaborations between musicians, particularly projects that involve emerging and established players. For example, Rachel (an established musician in her 40s) has been asked to collaborate with a range of emerging musicians, however the potential earnings from these projects are so low that she has not been able to afford many such opportunities. Another serious issue in relation to the development of the Scottish scene is the inability to bring in international musicians. John (40s) has in the past acted as a promoter, with a focus on contributing to the Scottish scene through setting up gigs for no personal monetary gain. He argued that it is impossible to bring over musicians from abroad due to the low going rates offered by venues and promoters. These observations should be balanced with feedback from promoters emphasising that they are working within financial models that require the offsetting of musician fees with income generated from audience attendance.

Jazz in Scotland

The musicians interviewed were generally enthusiastic and positive about the jazz scene in Scotland, describing it as a “hugely creative” community with a “beautifully rich history”. The small size of the Scottish jazz scene was highlighted as both a negative – lacking in industry infrastructure required for further development (e.g. agents, managers, record labels etc) – and as positive in that, for example, a greater percentage of young Scottish musicians have band leader experience, when compared to their London peers (Simon, 20s). The small size of the Scottish scene was experienced by musicians as both a

tight-knit and supportive community or wrought with division, competition and monopolies, with several musicians voicing concerns that Scottish jazz did not yet have its own narrative, and too often becomes “swallowed up by the ‘UK jazz scene’”. Clare (40s) also noted a lack of structured intergenerational mentoring and some of the younger players highlighted a generational divide: “you never see the older guys, the teachers. They never come to the same gigs. They maybe feel a bit jaded, because jazz festivals never put them on. You never see them at jam sessions”. Many of the issues highlighted are universally experienced across the UK and beyond.

Increased opportunities for intergenerational playing could be supported by promoters, festivals and Higher Education institutions through careful and deliberate commissioning and workshop events. Ben (30s) stated that the “younger scene is more together; there seems to be a little less of a division”. However, he and Sara (30s) suggest that the legacy and history of Scottish jazz has not been successfully communicated to subsequent generations: “You hear members of the younger generation talking as if they are doing things [international tours and being signed by labels] that have never been done before”.

Women musicians interviewed in particular argued that the Scottish jazz scene was “cliquey”, competitive and unsupportive. Musicians irrespective of gender are keenly aware of the underrepresentation of women and the restriction that this places on the development of the scene. Simply put, half of the pool of potential musicians and audience is currently being limited. On a more experiential level, women and gender minority musicians are experiencing barriers due to their gender identity. Musicians irrespective of gender and generation stated that they are actively attempting to address this imbalance through 50/50 bands, involvement in initiatives such as PRSF Keychange, teaching and mentoring. However, Scottish promoters, festivals or funding bodies can continue to play a more visible and strategic role. The gender imbalance of the Scottish jazz and blues scenes, and their lack of diversity more generally, would benefit from additional action research in order to identify and encourage a balanced field from which to programme.

It was clear from musician interviews that attempts to address the limitations of the Scottish jazz scene will only be successful if they come from the grassroots up or a neutral, non-aligned base. If imposed without musician consultation, it is very likely that any imperatives for change will be rejected by some musicians and viewed as tokenistic and “only serving certain individuals” (Daniel, 50s). As Luke (50s) and Michael (50s) noted, the Scottish jazz scene has attempted to collectivise several times, but each attempt has failed due to a lack of cooperation, trust and shared aims, in addition to an inability to reflect on and learn from past failures and challenges. Respondents communicated that sustained change will come from unity of purpose within the scene and cannot rely solely upon specific individuals, organisations or small, isolated collectives.

Musician Skill Gaps

In addition to a lack of jazz and blues industry infrastructure in Scotland, musicians also highlighted a range of skill gaps. The multifaceted nature of the contemporary musician role, beyond musical skill and

creativity, requires either paid support or individual development of a wide range of industry related skills. Musicians noted a lack of skill and confidence: in applying for funding; professional networking; marketing; online promotion; and the production of video content. Tom (20s) suggested that sessions with successful musicians “talking about their experience” would be invaluable, as would professional development workshops. Many of the other musicians expressed the same desire, but suggested that these workshops should be accessible and facilitated by a “neutral” expert (i.e. not part of the scene politics) with wider experience, particularly as these skills may offer musicians access to an audience beyond “jazz” and national borders. Such a pool of expertise already exists amongst music creators, educators and other sector professionals within the broader Scottish music scene. Research showed that promoters were seen to be more proactive in developing industry related skills, and benefited from limited formal support towards these ends.

Musician Experience of COVID-19

Musicians across the UK lost significant earnings through both the cancellation of live gigs and the cutting of temporary and short-term teaching contracts. Due to their self-employed status and low earnings many did not qualify for government support, beyond Universal Credit. Some musicians interviewed applied for emergency funding from music industry organisations, however most had not, with some being forced to seek alternative sources of income or give up accommodation to move in with family members. Beyond reductions in income and time, many musicians interviewed also reported a significant impact on their mental health and their desire and drive to create music. Equally, festival promoters and educators reported an increased pastoral responsibility to support musicians on an emotional level during this period and to ensure that the opportunities both targeted musicians in greatest need while producing high quality material for audiences.

For those musicians who continued to produce work, this period represented both barriers and opportunities. Sara (30s) collaborated with international musicians and hoped to convert this into future projects and Tom (20s) collaborated with bands that previously he had been unable to find the time to engage with. Equally, during the lockdown period musician-parents experienced additional barriers to the headspace for creativity as they were also home-schooling children. Several musicians interviewed conducted live-streamed performances (with requests for “donations”), recorded and released albums, and produced DIY video material. However, it is important to note that some musicians reported a lack of skills or technology necessary to achieve the above or to teach online. Musicians who taught older students noted that only a small number wished to continue lessons online which led to a loss of income. Although many musicians produced and circulated music without the support of promoters and festivals, Richard (40s) noted that it was difficult to expand through his own existing (primarily musician) network, arguing that a greater reach is only possible through such larger organisations. It should be acknowledged that this is a challenge not limited to the experiences of jazz and blues musicians.

It is important also to highlight the significant impact of the pandemic period on the development of emerging musicians, particularly those undertaking formal and informal training and education. All music students lost in-person tuition time and the experience of playing with more experienced

musicians. Equally, they have not been afforded the same opportunities to develop professional contacts or to practise interpersonal skills. It is likely that the disruptions of the past two years will further compound the skill gaps identified earlier and issues relating to divisions evident within the Scottish jazz and blues scenes.

Having enjoyed limited opportunities to attend live concerts, audiences across musical genres have also been affected by the pandemic with some younger fans never having been afforded exposure to live music. Following the easing of COVID-19 restrictions, a change in audience behaviour has become apparent to industry professionals with slow ticket sales due to continued anxieties around exposure to risks as periods of high infection rates prevail. Furthermore, it was reported that the postponement of live events during the pandemic has resulted in a bottle neck of rescheduled events leading to a flooding of the live entertainment market, increased competition for audiences and. Where opportunities abound for audiences to engage with the creative product, there is increasing insecurity amongst promoters around, in the short term, ticket sales and audience retention and the future sustainability of their business and funding models.

Festivals and Promoters

Jazz in Scotland, as elsewhere in the UK is promoted formally through the support of public funds, as an adjunct to the licensing trade in bars and restaurants or at grassroot level by altruistic enthusiasts or musician-led enterprises. The Scottish scene is currently served by four major urban festivals, Edinburgh Jazz & Blues Festival (EJBF), Aberdeen and Dundee Jazz Festivals (Jazz Scotland) and Glasgow Jazz Festival, alongside a number of smaller festivals including Islay Jazz Festival, Langtoun Jazz Festival, Kirkcudbright Jazz Festival, Callander Jazz & Blues Festival, Bute Manouche and Leith Jazz Festival. Year-round, jazz is performed across a diverse variety of spaces, but with none dedicated solely to the programming of jazz.

Predominantly during the summer months, Scotland's urban festivals provide annual opportunities for audiences to experience a wide range of high quality domestic and international artists. In 2019 Edinburgh Jazz & Blues Festival presented **950 local, Scottish and international performers in 16 venues (33,440 non-ticketed/ 34,760 ticketed)**, Aberdeen Jazz Festival staged **42 concerts with 80 bands across 27 venues (7000 non-ticketed/3000 ticketed)**, and Glasgow Jazz Festival presented **40 concerts with 300 musicians**. Their operational models are each similarly part-dependent on public funding to complement ticket income to cover staffing and production costs, with casual and volunteer staff performing an integral role in the festival experience. It should be noted that promoters communicated their commitment that volunteer roles should and do not take the place of paid staff. Pre-pandemic ticket sales across the festivals ranged from **30-70% of annual turnover**. Principal financial support for Scotland's jazz and blues festivals comes from the Scottish Government and the National Lottery, distributed by Creative Scotland, and local authorities.

Promoters of jazz and blues in Scotland typically took one of two approaches in response to COVID-19 social distancing restrictions, either adapting their offer to present online content, or by simply closing

their doors to wait the pandemic out. Some have yet to reopen, while others have used the hiatus to reconsider their role and in some cases to cease operating. The country's publicly funded festivals were arguably better equipped to respond to the needs of the day, securing ring-fenced funding and relying on reserves.

Edinburgh Jazz & Blues Festival, for example, presented an online programme for its July 2020 edition, streamed on YouTube and Facebook. The festival engaged **159 musicians** to create a range of digital content from filmed performances, to shows aimed at children and education, and heritage-focused programming that reflected on the festival's 40 year history. All content (with the exception of one international interactive act) was free to view, gaining a **reach of 372,000** with **76,000 engagements** over the four-day festival, of which **15% of those surveyed were first time festival 'attendees'**. The festival's 2021 programme was presented as a hybrid model comprising pre-recorded content and the simultaneous streaming of limited capacity live gigs complying with COVID-19 restrictions. Having piloted charging for content during its year-round programming, the festival priced tickets between £10 – £30 for individual live or online events and offered a festival pass that provided audience access to all online gigs for £40.

Glasgow Jazz Festival presented its June 2020 edition online as a series of solo concerts filmed at the city's Blue Arrow venue alongside the streaming of historical assets including a documentary about the festival and a biographical film about the Scottish saxophonist Bobby Wellins. Festival content was tied in with BBC Scotland's Sunday evening jazz programme, Jazz Nights. Although online content was offered free of charge, viewers were encouraged to donate to the festival's education and community budget. The festival organisers indicated that reach and engagement were good with donations exceeding expectations but were not in a position to provide researchers access to specific data due to lack of resources for the purposes of market intelligence. The festival's online brand was maintained through a programme of 'Winter Wednesdays' and subsequent Spring and Summer programmes in the lead up to the festival. Its 2021 edition again took place entirely online but with a special live event in a Glasgow public space as part of a city-wide happening. The festival was believed to have generated wider traction than its typical 65% Greater Glasgow core audience, as identified in earlier market research.

Through rapid response and learning around the creation, curation and dissemination of online content, respondents noted how these and the other Scottish jazz and blues festivals offered through their programming a vital lifeline to musicians whose earnings from the live music sector had all but ceased. Perhaps of equal importance was the articulation by respondents of the sense of continuum provided by festival activities during the two-year period of social distancing and their contribution to degrees of hope for the wider community going forward.

Scotland's festivals contribute significantly to the national jazz and blues scenes through the nurturing, professionalisation and platforming of its musicians and by providing opportunities for international collaboration. However, musicians discussed how they were heavily reliant on the relatively few opportunities that festivals are in a position to afford in their annual operational cycles. It was clear from

responses that the lack of a national touring infrastructure was seen as fundamental to perceived barriers in relation to creative and career development. Where, through a variety of initiatives, the festivals demonstrate their commitment to the support of a talent pipeline and to the provision of artist support, work in these areas is undertaken alongside the daily stresses of festival programming and production, typically undertaken by small core teams. It was also communicated to the researchers that artist uptake and engagement with training initiatives offered by the festivals was often limited. There is currently a limited number of agents or managers working within jazz and blues in Scotland, or domestic jazz record labels of any significant stature, to share in the shaping of artist career and creative product and an arguably undue responsibility therefore falls on festivals for artist development.

Interviews and focus groups emphasised the interdependency between the musician community and festivals as being a source of continual strain. Tensions were frequently articulated around expectation, professionalism, operational transparency, strategic vision and cultural gatekeeping, that were seen as contributing to a perceived landscape of 'us and them' - despite both artist and promoter communities essentially espousing shared goals of artistic excellence alongside artist and audience development. A further cause for concern in considering the sustainability of the scene is the ageing demographic of many of Scotland's jazz promoters, with limited potential for succession or replenishment currently in evidence.

Due to the nature of their operations, volunteer-run festivals and concert facilitators were seen to have more independence and creative freedom, thus largely escaping such frictions. Festivals reliant on significant public funding for their operational survival are required to devise strategies towards the delivery of outcomes that align to specific funder objectives. These are increasingly linked to topical areas such as EDI, fair working and environmental sustainability thus encouraging festivals to perform active roles in social change and community building. Those operating a more commercial or community-led model, although facing different challenges, are therefore not constrained to the same degree by the often exacting requirements of public funding.

Alongside Scotland's major urban festivals, organisations including Soundhouse, Whigham's Jazz Club and Edinburgh Jazz and Jive Club present year-round programmes and contribute to the cohesion of the jazz and blues community. An example of a grassroots, musician-led collective that is successfully showcasing new music and platforming both Scottish and international musicians can be seen in Playtime. Organising their own gigs at the Outhouse bar, Edinburgh since 2014 (with occasional forays to Pathhead Town Hall), Playtime took their eclectic programme of music and guest musicians online during the pandemic. This musician-led, collective approach perhaps offers a model for wider adoption for the strengthening of identity of the Scottish scene despite lack of public funding and albeit at times limited financial returns.

Venues

Scotland has a wide range of concert halls and venues but a relatively small number of which engage with the promotion or presentation of jazz and blues. In recent years a number of smaller venues have

been closed down due to environmental noise complaints or through inner-city property development strategies. Smaller gig spaces suffered disproportionately during the two-year period of COVID-19 restrictions despite receiving a £2.2 million relief fund for grassroots music venues.²

Scotland has just one independent venue that is specifically billed as being dedicated to live jazz through ticketed events. The Jazz Bar in Edinburgh (founded by the late drummer and entrepreneur Bill Kyle in 2005) presents a year-round programme of local and international jazz. In an interview with the researchers, Michael (40s) perceived The Jazz Bar to be one of the best venues for musicians, offering proper payment, all the kit and technical support, and no political agenda – “a healthy place for music to grow”. The venue was positioned as central to the city’s jazz scene, offering a space for musicians to develop their experience and confidence through regular gigs at venues like this, a “paying venue” in which musicians can hone their craft, although issues around the physical accessibility of a basement venue was not mentioned.

Musicians interviewed reported how The Jazz Bar has contributed significantly to the development of a sense of jazz community with a reputation beyond Scotland, attracting musicians and audiences alike. However, as Bill intimated in an interview available through the Scottish Jazz Archive³ a year prior to his passing in 2016, jazz constitutes approximately just one third of programming that is carefully curated to serve the different audience groups that frequent the bar, whose interests often lie beyond jazz. Bill noted nonetheless that the cross-fertilisation between audiences through diverse programming, as is being continued by his daughter Edith, was key to his vision for expanding a following receptive to jazz.

Beyond the Jazz Bar, Aberdeen has been presenting a weekly ticketed jazz night – Jazz at the Blue Lamp – since 2002 featuring a line-up of both domestic and international jazz artists and was described to the researchers by Craig (musician, 40s) as “one of the best jazz venues in Scotland, probably in Britain; every time I play there, I play to a full house”. The audience is perceived to be “open minded and supportive” (Craig), the “most reliable jazz audience outside Glasgow and Edinburgh” (Ben, musician in his 30s). As such, it has come to be seen as a hub of artistic activity, attracting musicians from Scotland and abroad.

In Glasgow, The Blue Arrow advertised a line-up that has its “focus on, but [that] isn't limited to, programming jazz”, and Jazz at Merchants House promotes monthly jazz performances featuring musicians from Scotland and further afield.. Again in Edinburgh, Sunday nights have since 2009 played host to a free-to-attend gig and jam session at Whigham’s Wine Bar, Edinburgh Jazz & Jive Club has since 2005 programmed a year-round Friday evening gig to members and guests, and Jazz at St James programmes an ad-hoc programme of Scottish-based musicians.

² <https://musicvenue-trust.com/2020/07/music-venue-trust-welcomes-2-2-million-fund-from-scottish-government-for-grassroots-music-venues/>

³ <http://scottishjazzarchive.org/histories/>

Scotland's vibrant pub scene has long been a key platform in the presentation of local, un-ticketed jazz performances and there is some evidence following the COVID-19 pandemic that this sector is expanding. It should be noted, however, that rates of pay for musicians within this sector of the live music economy have over the past 30 years barely increased, and indeed in many cases decreased. Engagement with the licensed trade sector can be seen in recent years in regular jam sessions in bars and cafes across Glasgow, run by RSC students, alumni or Glasgow-based musicians. These events have offered musicians (of various ages and experience) musically enriching experiences – an opportunity to play with diverse musicians, to be inspired by highly skilled players, to experiment and try out new ideas. More established musicians noted, however, that as their financial and family responsibilities grew, engaging with these typically low-paid gigs became increasingly difficult. For emerging musicians, balancing the development opportunities offered by pub jam sessions and “free” gigs (no entry fee) with promoter expectations was problematic – as David (musician in his 30s) notes, promoters have argued that it is difficult to sell tickets for a performance at a festival or venue that has been offered to audiences for free earlier in the year.

Interviews revealed that the younger generation of players emerging on the Glasgow scene were also found to have a greater appetite for finding new performance spaces, not historically or immediately associated with the music, and for presenting jazz side by side with other genres. Reflecting upon his cross-genre engagement with the Glasgow DIY scene, Iain (20s) states that it is “important to play at different venues, not associated with jazz, and to access different audiences.” He played a gig at Lucky 7 (a Glasgow bar) in 2019: “the busiest jazz gigs in Glasgow [are] all run by 17 and 18-year-old students. [There is] a potential market in the young, hipster Glasgow crowd, who focus on ‘who can go to the most different and strange gig’. [The gigs at Lucky 7] really opened my eyes... if [jazz] is branded right, as a cool thing, and not in comic sans... if people take risks more... you might be surprised at how well gigs do.”

Whilst such smaller gigs were considered to be the heart of the scene – providing a sense of community and identity (and an opportunity for musical development) for the people and the music of Scottish jazz – certain issues relating to the development of the scene remain. Due to the informal methods of promotion, many of these gigs remain hidden to non-jazz audiences, tourists and visiting musicians. Respondents reported that the often opportunistic and community-driven focus of these events has also meant that the weekly offering of gigs is not organised in a coherent way, with several sessions organised on the same night. Equally, musicians discussed how with a large number of musicians happy to play for free or very little, the live jazz scene is devalued and more experienced players are therefore less likely to engage on a professional level.

Audiences

As most of the data gathering for this project was undertaken during national COVID-related lockdowns and restrictions, our access to in-person audiences was severely restricted. Our understanding of jazz and blues audiences, therefore, focuses primarily on capturing demographics, reflections on pre-pandemic practices, and providing a snapshot of how people engaged with music during the pandemic.

This data was gathered through an online survey and was distributed through the Edinburgh Jazz and Blues Festival and Jazz Scotland. In order to try to capture communities beyond the festivals, we also distributed this survey through the small grassroots musicians' collective, Playtime. We would recommend that further research should be undertaken in-person and at events to further gauge audience sentiment and intention in order to gain a more comprehensive, nuanced and current, post-pandemic picture of audience behaviour.

In terms of demographics, of the 1,020 people surveyed **82.85%** were **over the age of 55**. 9.31% were 45-54, 5.2% 35-44, **2.16% were aged 25-34**, and **0.49% were 18-24**. Only **2.65%** of our 1,020 respondents were **under the age of 35**. This indicates that the jazz / blues audience in Scotland is predominantly mature. However, the data gathered may also reflect the type of people who responded to the survey request and the method employed in the sharing of the survey. Of the 1,020 people surveyed, **65.78%** were men. **33.92%** were women and three respondents identified as nonbinary. However, when broken down into genre-specific data, the blues audience is both more male (**80% men**) and has fewer attendees under 35. Significantly, when the data of respondents **under the age of 45** is analysed separately (79 respondents), **women make up the majority** (with **51%**) suggesting that a focus on developing a younger following for jazz and blues may offer routes to a more gender-balanced audience. No generational or gendered patterns in relation to jazz sub-genre preference were evident.

In terms of pre-pandemic practices, we focused on how people found out about performances and their festival attendance practices. Most of those surveyed (1,021 respondents) found out about gigs via **mailing lists (76%)**, in addition to a range of other sources such as printed media, festival/promoter websites, musician websites, word of mouth, printed marketing material and radio. **Very few surveyed (3.52%) relied upon specialist blogs**. **Facebook** was the preferred social media platform for finding out about jazz and blues gigs (**41.38%**), with **Twitter (25.05%)** and **Instagram** less used (**13.73%**). The data did not show any clear generational, gendered or genre differences in these practices, with mailing lists remaining dominant. Equally, there was no generational, gendered or genre related pattern in relation to social media platform usage. Certain practices have, therefore, become intertwined with scene engagement. However, in attempting to engage with new (i.e. younger and from different communities represented within Scotland) audiences, jazz professionals will need to go beyond the scene routes to information and identify different ways of communicating their message through the relevant platforms.

In terms of festival attendance, of those respondents who answered (771), **41.38% had attended gigs in UK beyond Scotland**, 25.05% in Europe, 13.73% in the USA, and **14.63% had not attended jazz and/or blues festivals outside of Scotland**. Australasia, South American and the Caribbean, Africa and Asia were less common destinations. Whilst narratives concerning the separation of the Scottish scene from the rest of the UK persisted amongst musicians and promoters, it is clear that almost half of the audience members surveyed considered UK-wide jazz festivals to be a part of their jazz and blues participation.

The open question: *why do you attend live gigs/festivals?* inspired a range of answers, but many noted the social aspect, how live music promotes wellbeing and provides pleasure. Many saw jazz and blues gigs, and festivals in particular, as a means to discover new music, new musicians and new venues.

Several respondents also mentioned the importance of supporting musicians. Reflecting upon the lack of live performances in 2020-21, many respondents took this opportunity to describe live music as a “unique experience”; of unique musical moments, created in that particular form for those gathered, completely unrepeatable, and offered within “intimate” surroundings. As voiced across musical genres, many also noted that the key aspect missing from live-streamed or pre-recorded online gigs was atmosphere: of being with like-minded people, of socialising, of engaging with musicians, and the occasion of attending a gig in person.

In terms of practices during the pandemic, **67%** of audience respondents had **watched a free online gig** during 2020, but fewer had paid (**43%**). **A third** of those surveyed had **donated to a venue, promoter or music festival**, or bought **physical or digital albums directly from musicians**. The most important features of online gigs for those surveyed (963 of the total) was **professional sound quality (57.4%)** and **professional staging (36.55%)**. Less important features were Q&As (10.49%), exclusive access (9.24%) and chat function (4.67%). **24.71%** of those surveyed (238 people) **would not pay for a virtual gig**. When split into genres, **38%** who **only attend blues gigs would not pay for a virtual gig**.

Funders

As part of this project, a number of Scottish and UK-wide industry and public arts funding bodies were contacted, to include Creative Scotland, the Musicians’ Union (who provided COVID-19 relief funds during the period of the project), PRS Foundation, Help Musicians, and Jerwood Arts. Creative Scotland provided a detailed analysis of funding applications, successes and failures under jazz and/or blues genres, which are summarised within this section of the report. The Musicians’ Union (MU) also provided Scotland-specific data for their COVID-19 Hardship Funds (up to and inclusive of January 2021). Representatives from Jerwood Arts and Help Musicians were also contacted over Zoom and/or email. PRS Foundation did not respond to requests for collaboration or to share data. Generally, responses from public and industry funders supported musician interview data which suggested a high reliance on Creative Scotland for funding, with Jerwood Arts, the MU and Help Musicians identifying a comparatively low level of applications from Scottish musicians, irrespective of genre. We have also included a section based on musician interviews which lay out some of the musician perceptions in relation to funding and, by extension, arts and culture policy in Scotland.

Data provided by Creative Scotland did not include distribution of Covid-19 emergency funds. This was because they would not have offered a typical picture of the types of applications received from individuals and organisations, and their success rates. Additionally, the Covid-19 emergency funds covered a broader period than the application data that Creative Scotland provided.

The most detailed data for the purposes of this project was provided by Creative Scotland. Although Creative Scotland does not ask that creators and organisations submit applications indicating genre(s), a dataset was generated in response to this project that covers a five year period – March 2016-February 2021. In terms of the success rate of jazz, blues and improvised music applications during this five-year period, **individual** applicants have experienced a **40.24% success rate** across Open and Targeted funding

programmes, and **organisations a 73.33% success rate** across Open, Targeted and Regular Funding programmes. In total, **£3,810,277** has been allocated to jazz, blues and improvised music applications through Creative Scotland Open, Targeted and Regular funds (to include Festivals Expo Fund and PLACE funding) over the past five years: £261,303 to individuals and £3,548,974 to organisations.

As a more detailed example, the data from jazz, blues and improvised music applications for Creative Scotland's **Open Fund** demonstrate a **51.64% success rate**, the highest application success rate for genres within music (ranging from 26.02% for traditional, folk or world originating outside Scotland to 48.75% for experimental music). This is **significantly above the average application success for music applications** generally (38%). However, in terms of total music applications for Creative Scotland's Open Fund, jazz, blues and improvised music represents 7.37% of the total, with 30.86% of applications focusing on rock, pop, indie, electronic and hip hop, 20.11% on Scottish traditional and folk, and 17.2% on classical and contemporary classical or new music. This may reflect the small nature of the jazz scene in Scotland in comparison to these other genres (i.e. less jazz musicians and organisations in Scotland, generally). And even though the jazz, blues and improvised music applications represent only 7.37% of the total applications, **the sector gained 14.6% of the total Open Funds awarded** (£1,755,6177 over this 5-year period). When the individual awards are separated from organisation awards for the Open Fund, it is clear that blues, jazz and improvised music applications from **organisations** have a higher success rate, with **71.42% success rate** (totalling £1,549,591 over these five years). **Individual** applications associated with these genres, on the other hand, have a success rate of **34.84%** (totalling £206,586 of Open Fund grants in the five years). The average success rate for all Music applications from individuals and organisation to the Open Fund is 38%.

This data from Creative Scotland suggests that jazz, blues and improvised music applications on a whole receive a very healthy percentage of the Creative Scotland Open Fund music budget, even though numbers of applications are lower than other genres (possibly reflecting the smaller nature of the scene). However, **this funding generally reaches the scene through organisations** (such as the Scottish National Jazz Orchestra, which receives regular funding). Creative Scotland data that breaks down the Open Fund applications to show types of project activity highlights particular issues in relation to applications by individuals.

- Our musician interview data suggests jazz and blues musicians see Creative Scotland funding as a means to fund recording, and this is backed up here with 59% of the individual Open Fund applications focused on recording (with seven other activity types – such as education, touring, and the creation of new work – the focus of much fewer applications). It should be noted that during the pandemic, which part of the dataset falls into, recording projects across genres became a way of sustaining musicians creatively and financially through periods of lockdown restrictions
- Further application quality issues are reflected in a 0% success rate for professional/creative development projects submitted by individuals. It is clear that musicians would benefit from training / support in applying for funding. This need was also evidenced in our musician interview data (see **Musicians** section). It should be noted, however, that the number of

applications received for professional/creative development in that 5-year sample period was very low (2). R&D activity also had a low application rate (1), but that project was funded. This suggests to us that individuals were not particularly looking to Creative Scotland for support in this area. It should also be acknowledged that when the Open Fund routes available to individuals was updated in response to Covid-19, the guidelines made clearer that developmental professional, creative and research activity was eligible.

Musicians interviewed highlighted perceived issues in relation to funding at a national and strategic level. Rachel (40s) argued that the biggest barrier for the current Scottish jazz scene is the lack of funding. She argued that this is reflective of decreased arts funding nationally, but also due to the division of available funding across the arts and a specific lack in funding support for compositional work. An established and active musician, Luke (50s) stated that one of the major problems for the Scottish jazz scene is the lack of a national strategy for music, exacerbated by the pooling of applications for Creative Scotland into “Arts”. He viewed this as a “political” move that made it easier for funders to over-fund certain areas (e.g. classical music) and not be held responsible for the lack of funding in other areas (jazz). Equally, Helen (40s) argued that public funding tended to go to the folk scene, a genre linked into national identity and tradition. Whilst Helen viewed this as an opportunity for musicians to “be more creative and versatile”, other musicians noted the peripheral place of jazz in the Scottish arts identity supported by the Scottish government, public funding bodies and indeed funded by music-focused organisations. Many expressed a hope that this Scottish musical identity will change over time, but that any such changes would have to be driven by representatives, individuals who represent the Scottish jazz scene as a whole rather than their own interests and projects. To avoid this in future, Ben suggested that “people who don’t have a vested interest, but also have the skills and the knowledge to get it done” should be in these lobbying roles to avoid musician perceptions of favouritism or vested interest.

Policy makers

Culture in Scotland is a devolved matter and public expenditure for culture is the most important source of funds for the creative sector with per capita public culture expenditure at all levels of government in 2018/19 of around £246 (Ormiston, 2019). The First Minister states that culture is a cross government priority which other ministries contribute towards to make culture more sustainable, fairer, inclusive and creative. The Scottish Government expresses its national outcome for culture as “*We are creative and our vibrant and diverse cultures are expressed and enjoyed widely*”. Following two years of consultation a Cultural Strategy for Scotland was published just prior to the pandemic in February 2020. The strategy emphasises the importance of culture to Scotland’s future prosperity and sets the direction for supporting culture in Scotland. The vision is for Scotland to be a place where culture is valued, protected and nurtured and this is centred on 3 ambitions: strengthening culture; transforming through culture and empowering through culture (Scottish Government 2020). Despite this timing a number of its priorities have been set in motion. A National Partnership for Culture (NPC) has been established to provide a voice for the sector, oversee the Cultural Strategy implementation and advise Scottish Ministers. Creative Scotland, as the public body supporting arts, screen and creative industries across

the country, applies a partial 'arm's length principle' for arts funding with the national companies directly funded by Government and other project funding streams. Providing advocacy and development opportunities for the cultural sector, Creative Scotland works closely with the economic development agencies, local authorities and public and private sector. Prior to COVID-19 the creative industries contributed more than £4 billion yearly to the Scottish economy supporting more than 80 000 jobs.

Scotland's festivals are a key part of the cultural ecosystem of the country, generating tourism opportunities, bringing communities together and showcasing local, national and international culture. Edinburgh's reputation as the world's leading festival city is mirrored with Scotland's reputation for the effective delivery of its arts festivals with over 200 established cultural festivals and those who are members of Edinburgh's Festivals making a total annual economic impact of £313 million (BOP consulting, 2016). A key recommendation following a report into the competitiveness of Edinburgh's festivals in 2006, Festivals Edinburgh was set up as a body to provide support, advocacy and governance for the then 12 key Edinburgh Festivals (AEA Consulting 2006). The Edinburgh Jazz and Blues Festival, started in 1978, remains a key member of this network. This heralded the beginning of a process of festivalisation, not just in Edinburgh but across other parts of Scotland, as the public and private sector started to realise the importance of festivals not only as an economic driver but also generating significant cultural and social impacts for the destination and the need for a more strategic approach to their funding, delivery and management.

Education

Findings and recommendations relating to jazz education in Scotland draw on focus groups and interviews with representatives from EJBF, St Mary's Music School, Edinburgh Napier University, the University of Aberdeen, Fife Youth Jazz Orchestra, the Royal Conservatoire of Scotland, Tommy Smith Youth Jazz Orchestra, Strathclyde Youth Jazz Orchestra (SYJO), and NYOS Jazz Orchestra, as well as independent individuals involved in the delivery of jazz education. Discussions interrogated the breadth of jazz education, from the role of creative music making in primary schools to opportunities for advanced training and career pathways into the jazz scene.

Key issues identified include:

- Patchy provision for young people that is largely reliant on key individuals leading and initiating jazz activity
- A lack teacher confidence, particularly in primary schools
- Limited specialist pathways in tertiary education
- A notable drop off amongst girls and young women engaging with the playing of jazz between secondary and tertiary education
- Impacts of COVID-19 on access to music education that are feared to lead to a gap in uptake of music in schools and tertiary education.

Amongst civic bodies, one major arts provider highlighted how the specialisms and interests of individual members of staff can have an impact on how much work is programmed and delivered in a particular area. In the case of this civic body, a jazz specialist was central to a significant amount of both performance and participatory/youth/education programming, and due to budget constraints there was no way to replace this knowledge once that individual left their post. In schools this is much the same, as noted by a representative from NYOS: “Over the years we’ve gotten to most parts of Scotland and most young people have had some access to jazz education. We’ve found pockets of activity, and (no surprise) they relate to teachers that are interested in jazz.”

Another jazz educator observed that most young people who go on to study jazz at Higher Education level are those who had keen and committed school teachers, band directors, and/or family and community members to encourage them, take them to concerts, and generally support their jazz development. While this educator noted that attitudes towards jazz education have broadened in schools over the past few decades, it is important to acknowledge that a reliance on individuals to promote jazz education, as opposed to embedded curricular change, will inevitably lead to gaps in provision across the country. This presents significant challenges for the professional jazz pipeline.

Of data concerning jazz education in Scotland made available to us, the most complete was that detailing student engagement with the Tommy Smith Youth Jazz Orchestra. Since its formation in 2002, the orchestra has provided a vital opportunity for 133 young musicians of which 104 were identified as male and 29 as female. 11 of these musicians have been recipient of the Young Scottish Jazz Musician of the year, 23 have gone on to playing in the Scottish National Jazz Orchestra and the overwhelming majority have gone on to study music in HE both in Scotland and abroad. The orchestra has recorded three albums celebrating their musical achievements.

At the present time, there is only one specialist jazz degree offered in Scotland, at the Royal Conservatoire of Scotland. Students with an interest in jazz do study elsewhere in Scotland - University of the West of Scotland, University of Glasgow, University of Edinburgh, Edinburgh Napier University, University of the Highlands and Islands, and the University of Aberdeen - but these programmes are broader in their scope, and jazz specialist tuition may be limited to individual modules of study, instrumental/performance lessons and ensemble activities.

Through interviews with stakeholders within the education sector it was found that at the foundational end of the education pathways, there are issues around teacher confidence (with music broadly, as well as improvisation and creativity specifically) in Primary Schools, and generally patchy music provision in schools across the country, regardless of genre or instrument. The pandemic also resulted in many young people not being able to take instrumental lessons or attend ensembles for the best part of the past two years. It may be some time before the professional jazz scene sees the impact of this hiatus, but it is important that issues from early years music through to higher education are considered by the sector.

Challenges

Through research conducted over the course of this project, it has become clear that any single approach to addressing barriers to growth and sustainability affecting the Scottish jazz and blues sector is not in itself sufficient. Rather, the recommendations that follow seek to speak to a range of sectoral fragilities and fault-lines uncovered through our interactions with jazz and blues stakeholders. These recommendations are proposed in a spirit of inclusivity and out of care for the holistic health and longevity of the scene and where it is hoped that economic growth may result, this report does not attempt to constitute a definitive roadmap but offers suggestions that can be adopted by the sector going forward.

The communities and ecosystem that nurture jazz and blues in Scotland were found by the research team to be at best fragmented and at worst divided. There is much to celebrate within the current scene, whether in the artistic attainment and generational replenishment of its musicians and in innovative festival commissioning and programming. However, there remains work to be done around equality, diversity and inclusion in stimulating access and potentials for sectoral growth. Recent times have witnessed a noticeable redressing of gender balance amongst performers. It nevertheless remains the case that, despite reports of gender-equitable engagement in teenage years, perceived barriers to progression continue to discourage musicians who identify in ways other than male. Our work on audience attendance, perhaps unsurprisingly, shows a largely similar gender imbalance.

The cultural identities of jazz and blues were seen as being both enriched and hindered by iconographic heritage and canon. Our interviews with creators and promoters included both those whose interests and motivations lay in the preservation of legacy and those who sought to innovate and adapt for contemporary society. This schism between protection of heritage and breaking new ground is only one amongst a number of others, from art for art's sake versus commodification, purity versus fusion, entertainment versus art, schooling versus apprenticeship, and legacy repertoire versus original composition. Despite these tensions, however, the researchers found consensus that the scene was commonly experienced as being broad and inclusive.

Arguably most counterproductive to sectoral health, however, were impressions gained by the researchers that point to commonly held experiences of mistrust, protectionism and defensiveness within the scene. In examining and unpacking these, a significant number of misconceptions around the roles of individual stakeholders were laid bare, alongside perceptions of institutional power imbalances and inequalities. Through in-person and online focus groups with cross-sections of the jazz scene, undertaken as part of this project, many such misconceptions were able to be collectively addressed with potentials emerging for wider discussion around gatekeeping and balances of power. Having through our research come to the position that unity is key to strengthening both the sector's shared identity and economy, our recommendation is therefore strongly focused on establishing common ground and a collective voice.

Our research makes clear that the jazz community in Scotland suffers due to significant differences in attitudes and approaches and that an accord, agreed by a representative and inclusive cross-section of the sector, would help to draw the community together and strengthen our voice in lobbying for support through funding and resources.

In response to these challenges we propose:

The articulation of a **sectoral accord** through which the broader Scottish jazz community (musicians, festivals, promoters and educators) can reach consensus and meaningfully embody through working practices.

The accord is intended to encompass common characteristics of the scene such as:

- the success and attributes of Scottish jazz
- the cultural and value and economic imperatives of jazz in Scotland

The accord would in turn provide a platform from which to collectively identify a set of objectives which the scene might aspire to and devise mechanisms for delivery. These might include, by way of example and in no particular order:

- fair pay and working conditions
- equality, diversity and inclusion
- health and wellbeing
- talent pipelines and professional development
- live music networks
- sectoral representation and lobbying
- the sharing of knowledge and good practice
- audience development and diversification

In aligning with the pledge and objectives, individuals and organisations working in jazz would indicate that they support the further development of the Scottish jazz scene through working proactively, productively and collectively to address challenges and barriers.

Purpose: the accord will be used to inform strategic aims and objectives for the growth and sustainability of the Scottish jazz scene and will provide a platform from which to communicate sectoral needs and desires to funders and policy makers.

Time-frame: following the publication of this report, the researchers undertake to arrange and facilitate an open forum event through which agreement on constituent pledge articles can be arrived at democratically and through representative consensus.

Deliverables: the accord will be published on the project website [www.jazzresearchscotland.org] and circulated to funding bodies and policy makers.

Legacy and Future Plans

It is hoped that this report will be the first stage of a wider longitudinal study into the Scottish Jazz and Blues Scene. A strong methodological approach has been developed and adopted and this can be replicated going forward, especially as the sector emerges from COVID-19 restrictions into new models of delivery and practice. Future research could also include case study and field work into other destinations with a strong Jazz and Blues Scene to develop best models of practice.

Appendix

Jazz Forum Discussion – March, 2023

As recommended in the above report, a pre-publication forum was held at St. Bride's Community Centre on Sunday the 26th of March, 2023 to which in excess of 300 stakeholders from the Scottish jazz scene were invited by email. Within this open forum, a range of issues were discussed in relation to the findings from the report. However, with only 15 participants in attendance, this forum, while being to a degree representative across areas of interest and engagement, could not claim to achieve critical mass. The researchers experienced some push-back to invitation from individuals within the musician community who expressed discomfort at "speaking truth to power" within a forum that included promoters and cultural funders due to the delicate and precarious nature of professional relationships within a small national scene. A number who confirmed their intention to attend did not appear on the day.

Acknowledging that all who work across the sector do so with best intentions for the health and longevity of jazz in Scotland, the imperative for inter-sectoral understanding of funding, marketing and exposure was clearly stated by those present in order that the scene might seek to overcome pervasive issues of trust and engagement. Accepting that there was an increasing sense of fragmentation within the community, it was at the same time evident that there remains an entrenched cynicism towards those who would seek to lead or represent the community. In response, the topic of collective advocacy was explored through ideas presented around the notion of a horizontally configured committee or registry of stakeholders that could communicate, exchange information and agree upon shared concerns and aspirations. The hope was that such an open forum model, without distinct leadership might begin to address historical and extant problems around perceived power structures and gatekeeping through providing a platform for the sharing of experience and good practice. However, the apparent sense of apathy within the community, as suggested by the relatively low attendance on the day, was seen as being potentially problematic for any such model to function effectively.

The consensus amongst attendees, in reflecting on findings from the report, was that the Scottish jazz scene is lacking unity, a sense of common purpose and a centralised means of advocacy, and that there is currently no definitive or inclusive mechanism in place for the sharing of information between musicians, festivals, funding bodies, policy makers and the press. Rather, a significant responsibility for the promotion of the scene, both at home and abroad, is shouldered by festivals and funding bodies (often with limited support or buy-in from the musician community) in their efforts to platform creative excellence and promote sectoral growth. For example, Creative Scotland (CS) recently partnered with Jazzwise magazine for the April 2023 issue in curating a CD of "Scottish Jazz", championing a roster of the country's well-known and emerging contemporary jazz artists. CS representatives noted at the forum that this initiative was positive for the sector overall as it illuminated the diverse and vibrant jazz scene within Scotland, with the intention of providing illumination and platforms for the rest of the scene in the wake of press promotion. Similarly, the forum hosts, Edinburgh Jazz & Blues Festival were in the midst of staging a festival of jazz from Luxembourg alongside local artists with a view to internationalising the Scottish offer and providing the domestic audience access to new experiences.

Representatives from CS reported a surge in fortnightly applications to the Creative Scotland Open Fund, from in the region of 25 applications per fortnightly panel in 2019 to in excess of 80 per fortnight post-pandemic. This increase in demand, partly attributed to increased CS visibility through the distribution of hardship funds during the Covid-19 pandemic, was seen as challenging when twinned with the concern that funding for the arts from the public purse is widely anticipated to remain static or shrink within short-term economic and political landscapes. Forum attendees, in concert with those interviewed in the main document, reported that while the number and quality of musicians playing jazz had increased substantially in recent years, that year-round 'bread and butter' gigs in pubs and clubs had dwindled, and that Scotland's handful of jazz festivals could not single-handedly support the livelihoods and creative aspirations of a growing pool of professionalised musicians.

CS representatives echoed a widely experienced positive direction for Scottish jazz, despite real terms cuts to public funding for the arts, observing an increase in applications from artists from atypical backgrounds, increased positivity, visibility and trust in CS after their distribution of hardship funds during Covid. Further, they observed a higher success rate for those claiming small amounts (under £5000), with their pre-application meetings providing encouragement and transparency in funding across the sector. The group agreed that due to finite funds, Creative Scotland could not bear the full weight of financial support for Scottish jazz and nor, due to economies of scale, could Scotland's jazz festivals be seen as a singular source for performance opportunities and talent platforming. In this respect it was proposed that there is a need for more effective inter-sectoral communication and dialogue around how the sector is funded and the economic landscapes in which the festivals and Creative Scotland operate through which some of the mistrust and dismay within the sector might be dissolved.

It was noted that many of the problems faced by the Scottish jazz community are not unique within the context of the wider music industries and that there may therefore be benefits to be gained through engagement with broader networks such as genre-inclusive Scottish Music Industry Association (SMIA) and Wide Days music convention. Younger demographics of jazz musicians in Scotland were foregrounded as examples of good practice through increased uptake of non-jazz specific resources that have historically low engagement from the sector.

In attempting to address apparent imbalances between supply and demand, strategies more typically observed in the rock and pop world were seen as offering potential benefits. A strong entrepreneurial spirit was observed amongst a portion of the musician community, specifically amongst the younger Glasgow-based generation, in their adoption of grass roots, DIY approaches to creative and business development through the nurturing of informal networks, the pooling of resources, and the swapping of knowledge and skills towards collective and individual success. In examples given there appeared to be a willingness to invest greater energies in finding new outlets for creativity, building new audiences and longer-term thinking – often in the absence of short-term financial gain. Worth noting perhaps is that the musical styles of these projects typically mirror contemporary trends through blending jazz and improvised sensibilities with other urban genres. The currency of this approach creates a potentially wider audience. Crucially, many of these acts present their music in venues that do not have a historical

affiliation with the promotion of jazz. However, as they are tapping into established audiences from other styles of music through increasingly diverse projects and strong online identities, such venues appear open to providing platforms for their music.

Further thoughts around audience development centred on the 'normalisation' of jazz amongst the young (the musicians and audiences of tomorrow) through high-quality exposure to the music at school age via a school's touring circuit or ad hoc education initiatives, examples of the latter of which have had significant impact in the past.

The forum explored several interpretations of professional development emerging from the report. Where gaps in acumen identified amongst musicians included skills in self-promotion through social media and mailing lists and the writing of funding applications, many musicians saw their professional development hampered by the lack of opportunities to tour and 'bed-in' their creative practice. The idea of a national touring network to facilitate this aspiration is not new. The work of the Platform organisation during the 1970s and '80s was highlighted as good practice, in which a central committee took responsibility for artist booking and 'chapters' around the country were responsible for local promotion. Although it was acknowledged that Platform presented only a limited number of Scottish music on their circuit and relied heavily on volunteers in its day-to-day running, the model was seen to be nonetheless useful. Here it was also noted that a number of 'jazz-friendly' promoter networks already exist in Scotland with which Scottish jazz musicians have limited engagement.

Imagined Futures

Central to the purpose of the report, questions around growth and sustainability in Scottish jazz were interrogated, through asking the group what needed to happen urgently to engender increased opportunity and, thereafter what collective visions might be for medium-term and long-range plans. These questions urgently need to be put to the wider community of stakeholders rather than solely to the limited number who attended the pre-publication forum.

In conclusion, and in the hope that the report provides a representative overview of the current experiences and concerns of those working in the sector, the researchers encourage the wider jazz community to engage in the following two initiatives towards goals of sectoral growth, increased opportunity and enhanced wellbeing:

- A scoping and feasibility exercise that explores a horizontally constituted representational body for the sector for the purposes of knowledge exchange, intra-scene communication and strategic goal setting. Such a body would serve to strengthen the voice of the collective and help to inform policy and strategy across the sector. Here there are key lessons to be learned from previous attempts to unify in order to avoid repeating past attempts.
- Community commitment to a regular (e.g. annual), in person forum for all stakeholders who choose to engage in discussions around perceived barriers, the de-mystification of individual and organisational roles, responsibilities and aims, providing a further platform for the sharing of good practice towards collective strength and scene sustainability. It became clear to us

through compiling the report that misconceptions often muddy the waters of understanding amongst stakeholders and the various forums undertaken in our research proved both useful and helpful in building intra-scene trust and respect. Such a forum should ideally be hosted by a neutral organization to encourage broad attendance.

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Ethics

This research was approved by and carried out under Edinburgh Napier University's Research Ethics Framework. All interview and focus group participants were granted anonymity and their accounts anonymised to protect their identities. All survey material was gathered as anonymised data, with demographic information included by not names/contact details. This report was co-produced by the research team, with input from Edinburgh Jazz and Blues Festival and Creative Scotland. Data was also provided by Clare Hewitt (Creative Scotland) and Louise Stanners Pow (Musicians' Union).

Background information

Research Team

Professor Haftor Medbøe is a lecturer and researcher within the School of Arts & Creative Industries at Edinburgh Napier University. His research interests focus primarily on the creative communities of jazz in the European context and in practice-led research, outputs of which have been published and presented at conferences internationally. As a musician, Haftor has to date released 15 albums and continues, as time allows, to perform his music at festivals and venues in the UK and abroad. He is Founding Chair of the Scottish Jazz Archive and holds a position on the Board of Directors of Edinburgh Jazz & Blues Festival.

Dr Sarah Raine worked as a Research Fellow at Edinburgh Napier on this project from January 2020 until March 2021. She is now a Postdoctoral Researcher at the University of Limerick and continues to contribute to *Researching the Scottish Jazz and Blues Scenes*, to include co-writing this report. In addition to collaborating with Edinburgh Jazz and Blues Festival, Sarah has worked in partnership with Cheltenham Jazz Festival on their Keychange pledge (AHRC funded, 2019), collaborated with Manchester Jazz Festival, Hull Jazz Festival, and Glasgow Jazz Festival, and is currently working with Body & Soul, Cork International Choral Festival, and TradFest in Ireland.

Professor Jane Ali-Knight is a Professor in Festival and Event Management at Edinburgh Napier University and a Visiting Professor at Curtin University, Australia. She lectures at Universities internationally, and facilitates training and development in the field. A recognised academic, she has presented at major international and national conferences, and has published widely in the areas of destination, festival and event marketing and management. Jane has extensive experience in planning, designing, and delivering undergraduate, postgraduate, and professional courses and delivering consultancy in tourism, festival and event management and has experience of working within the cultural festival sector both in the UK and overseas.

Dr Diljeet Kaur Bhachu worked as a Research Assistant on this project from October 2021 until January 2022. Diljeet is a musician, researcher, activist and educator based in Glasgow. Her research interests focus primarily on inequalities, education and (de)coloniality in music.

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