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STRENGTHINNUMBERS3

SKETCHES OF RESOURCEFULNESS

The statistical profile of Europe Jazz Network members in 2021

by Phyllida Shaw

Researched in 2022-3, published in 2024

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FOREWORD

This report provides a detailed picture of the Europe Jazz Network (EJN) members in 2021 - a particularly unique year for the live music sector, and the world at large. In the wake of a complete halt to concerts and social gatherings at the start of 2020, due to the COVID-19 crisis, 2021 witnessed a partial restart of public activities, albeit under numerous regulations and restrictions.

What this report highlights are the remarkable resourcefulness and dynamism of EJN network members. They adapted swiftly, creating initiatives to continue offering new and exciting opportunities for artists and audiences. Notably, the EJN network not only sustained most of its activities, but also expanded its membership, now comprising over 200 members.

While some form of normality returned for the EJN members after a few years, this publication remains a testimony to the resilience and strength of the creative music sector in Europe. It shows the essential role of creative music in bringing people together, even in challenging circumstances.

We extend our heartfelt gratitude to all members who contributed their time and effort to ensure that Strength in Numbers 3 holds value not only for them and their fellow EJN members but also for musicians, audiences, other professionals, policy makers, and funders. Special thanks go to Phyllida Shaw, who diligently prepared and circulated the survey among all EJN members, ensuring we received as many answers as possible, and analysing its outcomes. Lastly, we would like to thank the EJN Board of Directors and all research working group participants for their invaluable contributions to this important endeavour.

We hope you enjoy reading this report.

Giambattista Tofoni
EJN General Manager

1. INTRODUCTION

This report shares the findings of Europe Jazz Network's latest statistical survey of its members. Completed in December 2023, it was the third in a series of surveys called *Strength in Numbers*, supported by the European Union's Creative Europe programme. The first *Strength in Numbers* report (published in 2012) looked at the financial year 2009 and the second (published in 2016) looked at 2013. Both documents can be found on EJN's website. This report, *Strength in Numbers 3* (published in 2024) focuses on 2021.

For every EJN member 2021 was an untypical year. Early in 2020, the live music sector was confronted by the coronavirus disease (COVID-2019). National governments responded in different ways but, in most countries, venues were closed for months, festivals were cancelled, and many musicians, technicians and members of the wider workforce were forced to look for alternative sources of income.

When venues were allowed to reopen, they were advised, and in some cases required, to reduce the number of tickets they sold and to enforce social distancing and hygiene measures to lower the risk of infection. While some EJN members reported a strong demand for live music, when it restarted, others found that audiences were cautious and slow to return. The changed environment in 2021 and the continuing impact of the coronavirus are clearly evident in the numbers reported here. The financial data provided by members show a sharp decline in income and expenditure from 2019 to 2020 and only a partial recovery in 2021. The number of bands promoted in 2021 and overall audience numbers were both much lower than they would have been in a normal year.

This report illustrates the strength and resourcefulness of EJN members. With and without the support of national, regional and local governments, most members continued to operate at some level. Venues, festivals, infrastructure organisations and EJN itself introduced programmes and services to help organisations and individual music creators to keep going. Venues and festivals livestreamed and broadcast performances, workshops and discussions. They supported musicians to write and record and they introduced online learning and participation activities.

When the survey closed in December 2023, EJN had 191 members in 35 countries. The full membership is a rich mix of organisations of different types and sizes, operating in different cultural and economic contexts. While this report does include some comparisons with data from the previous *Strength in Numbers* surveys, the change in the size and profile of the membership and the impact of the coronavirus have resulted in a report with its focus on the recent past. The survey questions can be found in Appendix 2.

Members answered as many questions as they could with the time and information they had available. There were questions that were not relevant to all types of organisation,, some were not collecting the data requested in 2021 (on gender, for example) and some were unwilling to provide detailed financial information. The sample size therefore varies from question to question and is stated below each table and chart.

I echo the thanks offered by Giambattista Tofoni in his foreword and would also like to express my gratitude to him and his EJN colleagues, Francesca Cerretani and Stefano Zucchiatti, for all the time, effort and care they invested in this project.

Phyllida Shaw

2. THE HEADLINES

- **The number of EJN members has almost doubled** since the last *Strength in Numbers* survey: 191 organisations were eligible to take part in 2023 compared with 99 in 2016. The response rate for the 2023 survey was 58% (111 organisations) which compares well with 61% (54 organisations) responding in 2016.

- Of the 111 respondents, **78% described their main role as a festival, a club or venue**, **or as a national or regional infrastructure organisation**. The rest had more than one significant role. Reviewing the sample as a whole, 61% of these members are producing festivals, 28% are running a club or venue and 23% are providing national or regional support services. In this respect the profile of the respondents broadly reflects the profile of the EJN membership.

- The percentage of respondents spending all of their resources on some combination of contemporary jazz, creative and improvised music has not changed much since the last survey (43% in 2023 compared with 47% in 2016) but the **percentage of members now spending at least half of their resources on these kinds of music has increased from 64% to 90%**.

- Despite the extraordinary conditions prevailing in 2020 and 2021, **EJN members continued to serve artists, audiences and participants in musical activity**, and the policy makers and funders on whose support the sector relies.

In 2021:
85% of members promoted their own concerts
73% produced a festival or festivals
64% organised learning and/or participatory activities
48% commissioned music
38% advised on government policy
21% undertook research or contributed to others' research

- 92 members spent €15,6m on artists in 2021; 84 members promoted 4.696 bands involving 17.400 musicians and 70 members recorded attendances of 740.473 at their live events that year. These figures do not include the audience for livestreamed events or subsequent streaming and broadcasts of recordings. If these results are extrapolated to the whole EJN membership, the estimated totals for 2021 are **7.411 bands promoted, involving 22.233 musicians and reaching an audience of 1,56m**.

- **76% of respondents are working to achieve a better gender balance in the bands they promote**. Data provided by 51 members showed that 69% of the members of bands promoted in 2021 were male. That same year, 37 respondents commissioned a composer. Here the gender balance was better with 49% of the composers identifying as male, 46% as female and 5% as something other than male or female.

- The total number of permanent, temporary, freelance and voluntary roles offered by 107 EJN members in 2021 was 6.296. If this figure is extrapolated to the full membership, the **estimated size of the workforce in 2021 was 11.239**. For 28% of members, the workforce was smaller than in 2019, for 19% it was larger and for 53% it was about the same. **Volunteers make up 44% of the EJN workforce**.

- **The gender balance of the EJN members' workforce is changing.** In 2013, 55% of the total workforce (including volunteers and Board members) were male and 45% female. By 2021 **46% of the workforce were male and 54% female**. Around 2% of the total workforce identified as something other than male or female. **Governing body members and artistic directors are much more likely to be male, while volunteers are more likely to be female**.

- The EJN membership's **income, expenditure and public-facing activities were considerably reduced by the arrival of the coronavirus in Europe** in the first quarter of 2020. The prevalence of the virus and the measures introduced by national and regional governments, to limit its spread, varied from country to country. Some members were able to operate with just a few restrictions while others were required to suspend their usual activities for months and change the way they supported artists and connected with audiences.

- The combined income of 93 EJN members in 2021 was €132,6m. Extrapolated to the full membership of 191, **the estimated total income that year was €204,4m**. In 2021, national and regional governments and their agencies, the European Union, embassies, cultural and export offices **together provided 55% of respondents' combined income**.

- Their combined expenditure was €127,1m. Extrapolated to the full membership, **estimated total expenditure was €200m**. These figures are well below what they would have been without the disruption caused by the coronavirus. **Between 2019 and 2020 the combined income of EJN members dropped by 27% and their expenditure dropped by 48%.** By the end of the 2021 financial year, members' median income and expenditure **were still more than 30% below their 2019 level**.

- In 2021, the **median income** of members (the median figure is more representative than the average, because of the wide range of numbers involved) **was €402k, down from €595k in 2019**. **Median expenditure was €369k in 2021, down from €570k in 2019**.

3. THE CONTRIBUTORS TO THIS RESEARCH

The survey was completed by 111 EJN members (58%) in 30 countries (86%). A full list can be found in Appendix 1. Only five EJN member countries are not represented in this report. Each had only one EJN member at the time of the survey: Bosnia and Herzegovina, Hungary, Luxembourg, Serbia and South Korea. Table 1 shows the number of surveys returned from each country.

TABLE 1

The number of surveys returned from each country

Sample: 111

Countries	Number of surveys returned
Norway	17
France, Italy	11
Sweden, the UK	8
The Netherlands	6
Belgium, Finland, Germany	5
Austria, Poland	4
Spain, Turkey	3
Denmark, Estonia, Lithuania, Switzerland	2
Australia, Bulgaria, Czech Republic, Greece, Iceland, Ireland, Israel, Latvia, North Macedonia, Portugal, Romania, Slovakia, Slovenia	1
30	**111**

In 22 countries (73%) more than half of their EJN members took part, and in every country at least 25% of members responded. Table 2 shows the proportion of each country's members represented in this report. For example, the 17 surveys received from Norway represented 77% of that country's 22-strong membership. Italy's 11 surveys represented 44% of its 25-strong membership. Countries with a much smaller number of members (Bulgaria, Ireland and Turkey, for example) were more likely to achieve a 100% return.

TABLE 2

The percentage of each country's EJN membership represented

Sample: 111

Countries	% of EJN members that returned a survey
Australia, Bulgaria, Estonia, Ireland, Latvia, Slovakia, Sweden, Turkey	100%
Norway	77%
Belgium, Finland	71%
France	69%
Lithuania	67%
Austria	60%
The Netherlands	55%
Czech Republic, Greece, Iceland, North Macedonia, Poland, Portugal, Spain	50%
United Kingdom	47%
Italy	44%
Germany	42%
Denmark, Switzerland	40%
Israel, Slovenia	33%
Romania	25%

The **different types** of **organisation**

Respondents were asked to choose one or more of four descriptions of their organisation: a festival, a club or venue, a national or regional infrastructure organisation, or something else. Of the 111 respondents, 87 chose one of these descriptions and 24 chose two or more.
Chart 1, below, shows that 40% of these members described themselves as a festival (line 1 of the chart). A further 21% said that 'a festival' was one of their functions (lines 4,5 and 7), so a total of 61% of respondents were involved in running festivals.

17% described themselves solely as a national or regional infrastructure organisation (line 3) and another 6% included this as one of their roles (line 7). A total of 23% were national or regional infrastructure organisations.

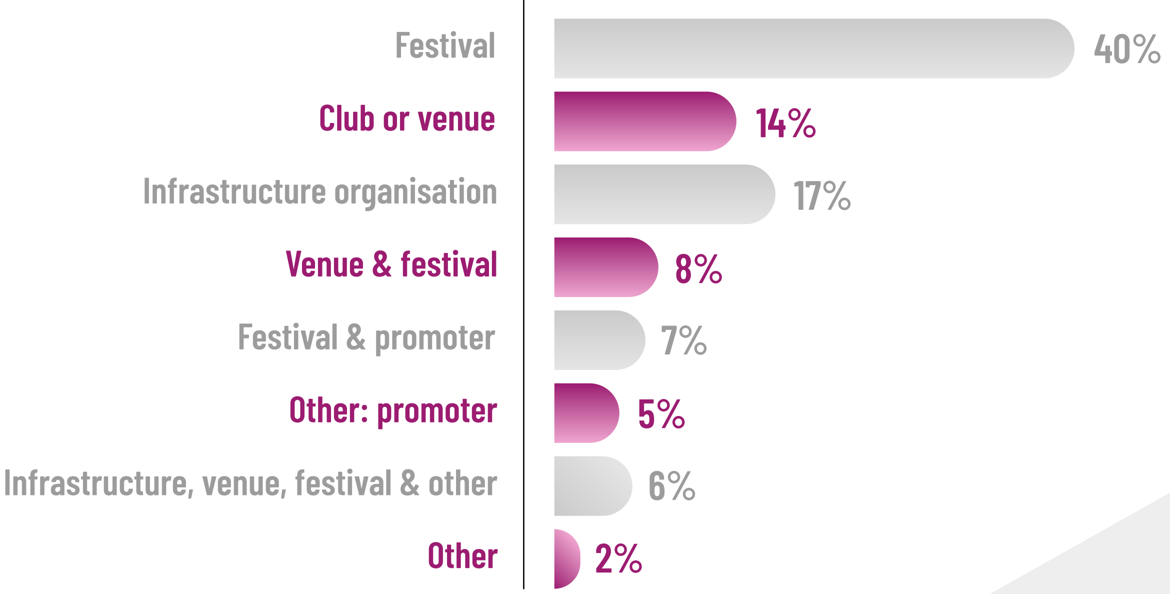
14% were a club or venue only (line 2) but this figure doubled to 28% when those that ran a venue in addition to other activities were included (lines 4 and 7).

The most common 'other' role was promoter, with 5% describing themselves in this way (line 6) and a further 7% combining promoter with their role as a festival (line 4). The profile of the survey respondents broadly reflects the profile of the EJN membership.

CHART 1

How respondents describe themselves

Sample: 111



Spending on **contemporary jazz, creative and improvised music**

EJN's membership encompasses a wide range of organisations, from small, volunteer-led festivals and venues, dedicated to creative music, contemporary jazz and improvised music, to multimillion-euro venues where these types of music are part of a bigger programme.

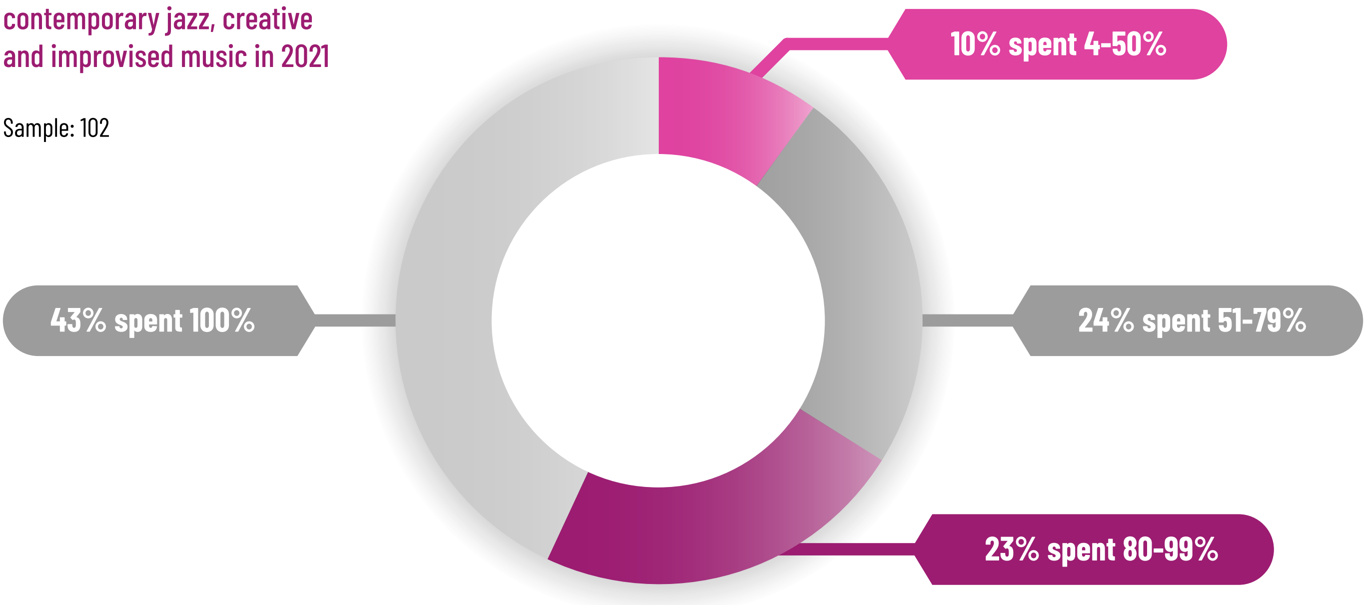
Members were asked to estimate what percentage of their expenditure in 2021 was on contemporary jazz, creative and improvised music. Chart 2 summarises the data from 102 organisations. It shows that 43% of respondents spent 100% of their resources on these kinds of music; 23% spent between 80% and 99%; 24% spent between 51% and 79% and 10% spent up to 50%.

A similar proportion of members spent 100% of their resources on jazz in 2013 (43% in 2021 compared with 47% in 2013) but the proportion spending at least half was much higher in 2021 (90% compared with 64% in 2013).

CHART 2

Percentage of respondents' expenditure dedicated to contemporary jazz, creative and improvised music in 2021

Sample: 102



4. EJN MEMBERS' ACTIVITIES IN 2021

EJN members promote concerts, commission and record music and run learning and participation programmes. They act as advocates for jazz and creative music, they provide advice and information, they support the training and professional development of artists and others in the sector, and they undertake and contribute to research.

The survey presented a list of activities and asked members to indicate which of them they had delivered in 2021. Table 3 presents their answers, with the most common activity at the top. The promotion of musicians and their music dominates, with 85% of members promoting their own concerts in 2021, 73% producing a festival or festivals and 64% running learning and/or participation programmes for individuals and/or groups.

Almost half (48%) of these members commissioned music in 2021 and 35% were involved in recording. Around half provided information and advice services in 2021 and acted as advocates for these fields of music, and 38% (42 organisations) advised on local and/or national government policy on music. Activities described as 'something else' included broadcasting, livestreaming and film making, and supporting artists to tour.

TABLE 3

EJN members' activities in 2021

Sample: 111

Activities	Number of responses	% of responses
Promoted our own concerts	93	85%
Ran a festival (or festivals)	81	73%
Worked to raise the profile of creative music, contemporary jazz and improvised music in our country	81	73%
Offered learning and/or participatory activities for individuals and/or groups	71	64%
Offered professional development opportunities, such as training, conferences and networking events	65	59%
Offered information about music	55	50%
Offered advice	55	50%
Commissioned new music	53	48%
Were advocates of creative music, contemporary jazz and improvised music internationally	52	47%
Advised on local and/or national government policy on music	42	38%
Made recordings	39	35%
Provided a venue for other promoters	28	25%
Undertook research and/or contributed to others' research	23	21%
Ran a music library or archive	10	9%
Something else	13	12%
Total	**761**	

The categories of activity described in *Strength in Numbers 2* were not the same, but it is still possible to draw some comparisons between 2021 and 2013.

In **2021**, **73%** of respondents ran festivals compared with **62%** in **2013**.

48% commissioned music compared with **34%** in **2013**.

64% offered learning and/or participatory activities compared with **58%** in **2013**.

21% undertook research, or contributed to others' research, compared with **10%** in **2013**.

38% advised on government policy compared with **22%** in **2013**.

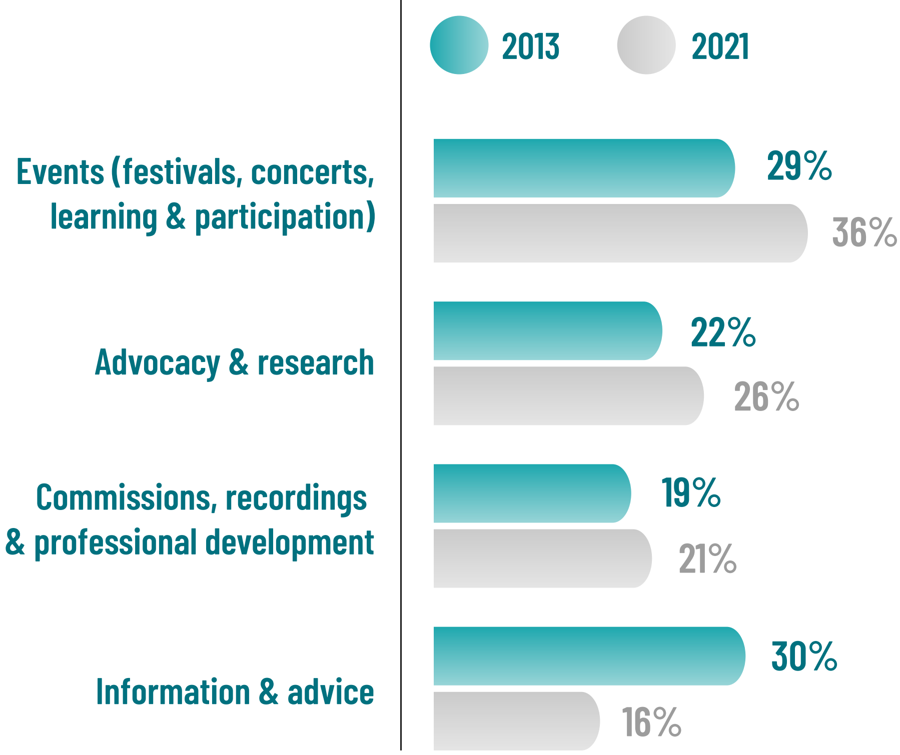
Sample: 50 organisations in 2013; 111 in 2021

These figures reflect the predominance of festivals and venues in the membership in 2021. Chart 3 groups the different types of activity under four headings. It shows that in 2021, events (festivals, concerts, learning and participation) accounted for 36% of respondents' activities, advocacy and research for 26%, commissioning, recording and professional development 21% and the provision of information and advice 16%.

In 2013 the provision of information and advice was the most common activity (30%), closely followed by events (29%), advocacy and research (22%) and commissioning, recording and professional development (19%).

CHART 3

The percentage of respondents delivering different types of activity in 2013 & 2021



Promoting **artists** and **serving audiences**

For much of 2021, in many EJN countries, the activities of music venues (indoors and out), musicians and audiences were constrained by regulations and advice designed to limit the spread of the coronavirus. The number of live events EJN members promoted or hosted was fewer than in a normal year. Festivals were shorter and audiences were smaller.

This description from a member in France illustrates the necessity for promoters to change their plans:
'We had to adapt in 2020 (3 days in September instead of 10 days in May) and postpone the 2021 edition (5 days in August). In 2022 we [promoted] fewer concerts than in 2019 but we had more audience than expected. The launch of ticket sales for 2022 has just started, and it seems to be back to normal, although we can still see that the audience are still booking late.'

In 2021, 92 EJN members spent €15,6m on artists' fees and expenses and grants for touring.

TABLE 4

Spending on artists in 2021

Sample: 92

Performance fees for artists in concerts promoted by the EJN member	€ 11.306.498
Fees for commissions	€ 911.652
Artists' travel, accommodation and subsistence	€ 2.744.227
Grants to musicians for national touring	€ 416.555
Grants to musicians for international touring	€ 228.950
Total	**€ 15.607.882**

In 2021 84 members promoted 4.696 bands. This is an average of 56 bands each, but the numbers span a wide range (from four to 600) so the median figure of 32 is more representative. These bands involved 17.400 musicians.

70 members recorded attendances of 740.473 at their live events in 2021.

These figures do not include the audience for livestreamed events or subsequent streaming and broadcasts of recordings.
When the numbers are extrapolated to the whole EJN membership, the estimated totals for 2021 are 7.411 bands promoted, involving 22.233 musicians and reaching an audience of 1,53m (see Chart 4).

Touring

In 2021, 41 survey respondents supported 1.115 performances by 1.681 national artists in their own country and 17 supported 295 artists to perform in other countries. Nineteen respondents were responsible for organising showcases involving an estimated 500 artists.

Some organisations highlighted the way their programming of artists was influenced by financial and other factors.

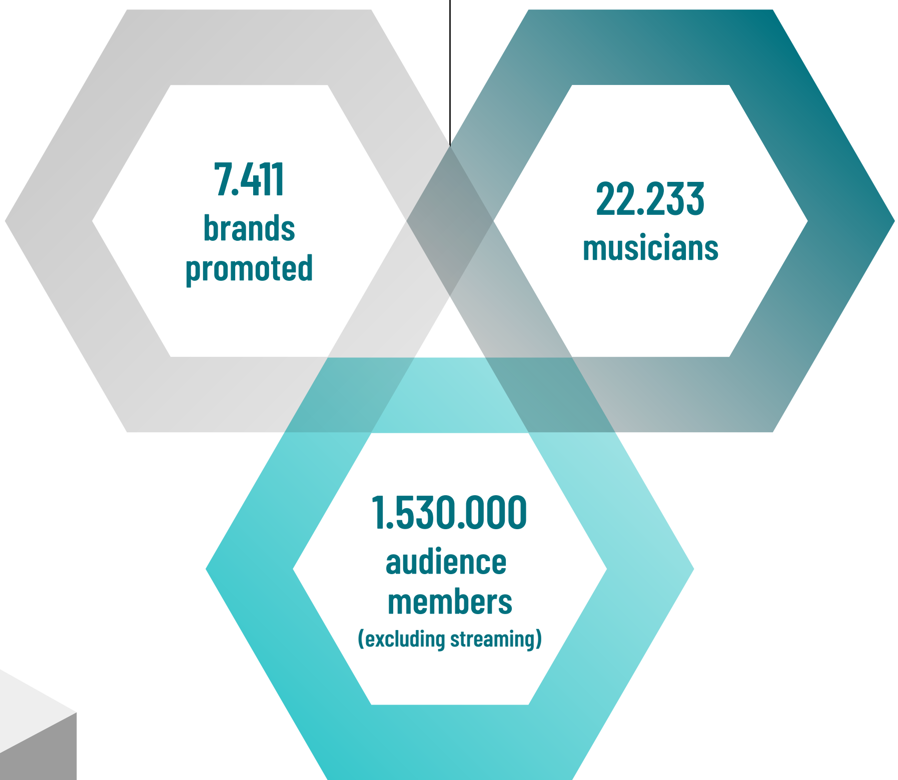
A Slovenian member told us: *'Fees for the gigs rose after Covid by at least 50%, including all other costs except work, as we work for free. The national budget for culture does not follow those price changes.'*

A UK member wrote: *'Brexit [has made] a noticeable impact with fewer international artists in our programme. The cost of living crisis has impacted audience numbers and ancillary spend and increased staffing and production costs have pushed expenditure higher. This has meant increased pressure on the programming teams to book artists who sell tickets, with no investment for riskier, left field acts.'*

CHART 4

Bands and musicians promoted and audiences reached by EJN members in 2021 (an extrapolation)

Sample: Band and musician numbers from 85 respondents. Audience numbers from 70. Extrapolated to 191



The **gender balance**

On the subject of gender balance, the survey asked members to indicate which of three statements they agreed with. They could choose as many as they liked. Seventy-eight responded and the percentage agreeing with each statement is shown to the right.

'We are working to achieve a better gender balance.'	**76%**
'We achieved a good gender balance in the concerts we promoted in 2021.'	**41%**
'Gender balance is not a high priority for us.'	**4%**

Almost all of those who thought they had achieved a good gender balance in the concerts they promoted in 2021 also said that they were working to achieve a better one.

51 respondents detailed the gender balance of the bands they had promoted in 2021. An additional additional ten that were not collecting this information in 2021 are collecting it now.

Of the sample of 51, 42 recorded the gender of band members, 21 recorded both the gender of band members and the number of all-male bands, and nine recorded only the number of all-male bands.

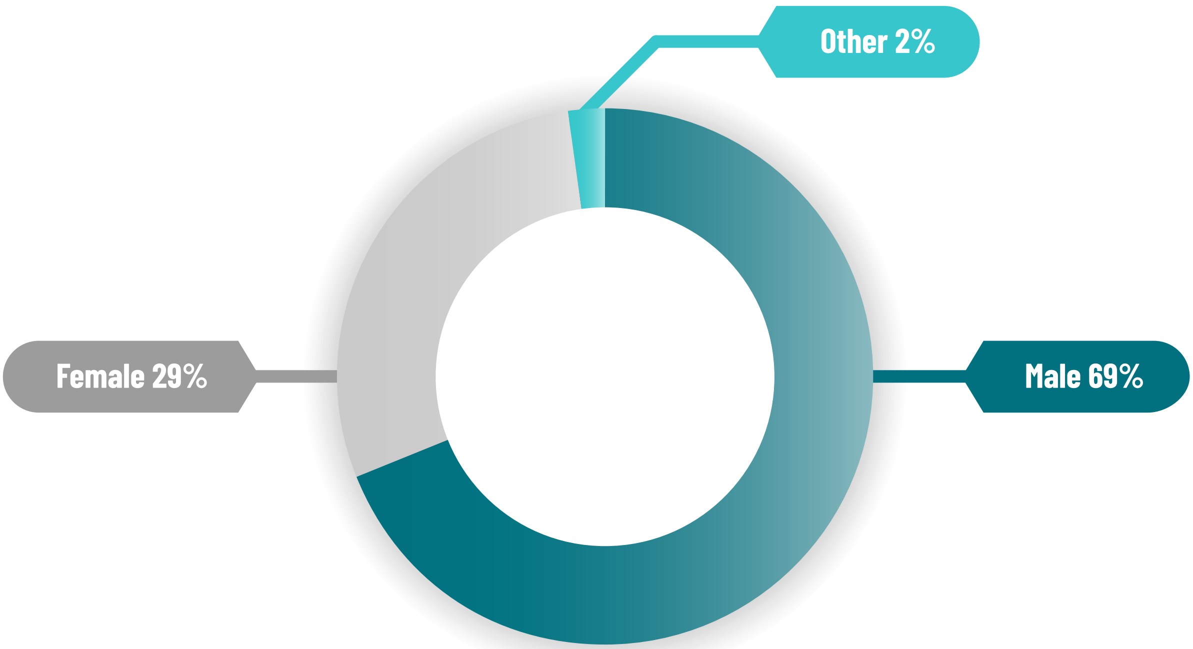
Around half of all the bands promoted by 30 EJN members in 2021 were made up of male musicians only.

Chart 5 shows that 69% of band members identified as male, 29% as female and 2% as something else.

CHART 5

The gender of band members promoted in 2021

Sample: 51 organisations

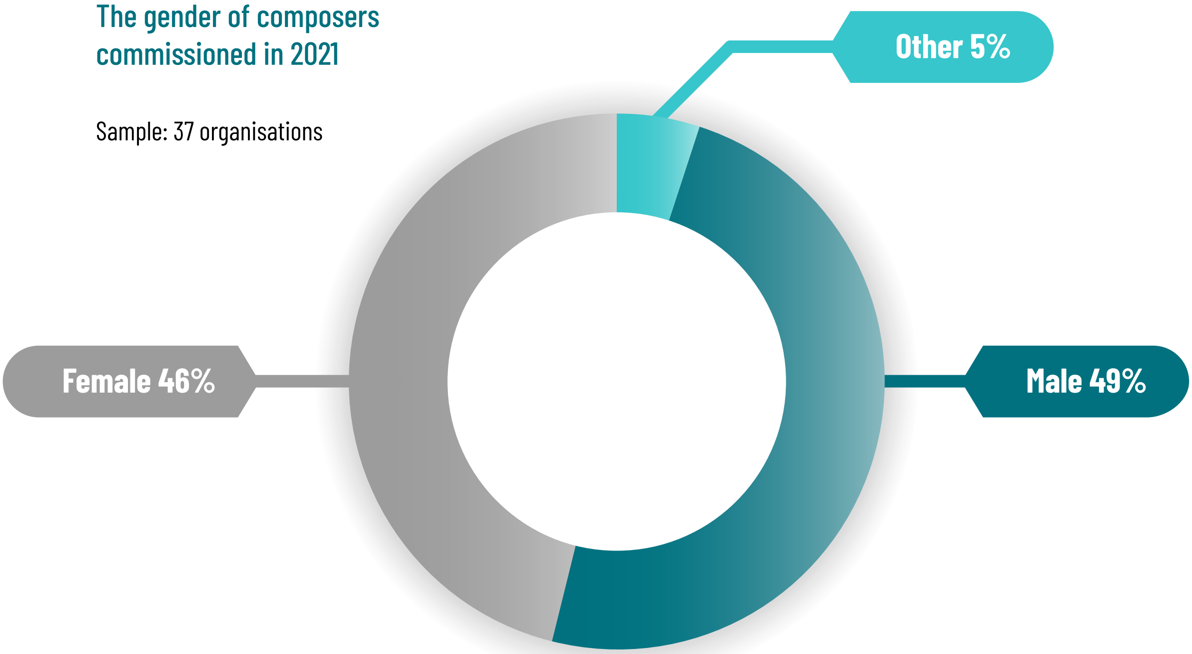


In 2021, 37 survey respondents commissioned a composer. Here the gender balance was better with 49% of the composers identifying as male, 46% as female and 5% as something other than male or female.

CHART 6

The gender of composers commissioned in 2021

Sample: 37 organisations



Livestreaming and broadcasting

The coronavirus greatly increased EJN members' use of livestreaming and gave artists and promoters a way to continue to connect with a live audience. Some members recorded performances for subsequent streaming or broadcast.

In 2021, 44 of these respondents (40%) livestreamed 888 events. Only 25 of them could provide audience numbers but even this small sample demonstrates the reach of the technology. The 25 organisations delivered 602 livestreams to an audience of 2,28m. Audience numbers ranged from under 100 for a single event to one million for a series. More than half of respondents charged audiences nothing for livestreams and 19% offered at least some of them for free.

EJN members had different experiences of livestreaming and different views on its desirability and financial viability. Some who livestreamed for the first time during the coronavirus, or who livestreamed more than they had previously, have continued to use this method to reach a larger audience for performances, participatory activities, launches and discussions. These may be wholly online or hybrid events, with both a live and remote audience. Other members have reduced or stopped livestreaming altogether and are prioritising their on-site audiences.

The following comments from survey respondents (some of which have been edited for clarity) illustrate the contrasting experiences of, and attitudes towards, livestreaming.

'We had the first lockdown mid-March 2020 and established a streaming platform... We engaged and paid musicians to play in the empty club and deliver the concerts via our homepage. We didn't stream via YouTube or Facebook or anything like that. We created our own channel. The stream ends when the concert is over and cannot be downloaded. The stream is free but we ask for donations. We will stream in the future, in parallel with public concerts [because] we can reach an additional audience, which cannot attend the club.'

'The streaming was worldwide and we had more than 30 different countries connected.'

'We got regional funding to start a project, which aimed to livestream concerts in a more exclusive, broadcast manner. We also aimed to educate musicians to find other ways to earn an income by learning how to film.'

'Now we know how to handle live-streams, we [have] got new and younger audiences and we have some good recordings on our YouTube channel. As we continued to make gigs, even in the worst situation, we earned a good reputation [among] musicians who really appreciated it.'

'Musicians and audiences no longer take live concerts for granted. We now know how to livestream events and have strong partnerships with companies who can provide such services.'

'We organised livestreaming when we thought we could only have half [our usual] capacity. But the law soon changed and we could have our audience back. Only a few people bought streaming.'

'Livestreaming isn't financially viable for us.'

'We started to do livestreams in 2017. Now, after Covid, we have drastically reduced the amount of livestreaming to persuade people to come to the concerts.'

There were members who recorded their livestreams so that they could be replayed later and others who chose not to livestream but recorded performances and subsequently streamed or broadcast them in edited form. One respondent explained:

'We decided to invest in making good video. Not just recordings of a live concert but staged concert videos, with scenography and film directors.'

A promoter reported having posted videos of 100 concerts on YouTube, attracting a total of 77.000 views. Another, who organises showcase events, recorded them and made them available online. One of these showcases attracted an online audience of 2.117 and artists were booked by programmers who had been introduced to them in this way.

For some EJN members, online platforms have become a key tool in the development of the audience for creative music. A festival organiser who established a *'high quality, online music channel'* during the pandemic was determined to continue to use it, *'not least because we offer what public radio and television have almost entirely dropped from their schedules. It has given artists a platform where we can promote their music and provide background information. The channel gives us all kinds of other opportunities, including more international outreach, to audiences and professionals.'*

5. THE WORKFORCE

Information about their workforce in 2021 was provided by 107 EJN members. They were asked for the number of full-time and part-time permanent and temporary employees, freelance contractors and volunteers. The numbers were not available in every case, so the totals in each category are likely to be an underestimate. In the case of two organisations with many more employees than the rest, the numbers have been reduced to reflect the percentage of their expenditure on contemporary jazz, creative and improvised music in 2021.

Chart 7 shows the percentage of the workforce accounted for by the different types of employment. Permanent employees made up 19% of the workforce, temporary employees 16% and freelance contractors 21%. Almost half of the workforce (44%) were volunteers.

CHART 7

The composition of the workforce in 2021

Sample: 6.296 roles

The total number of permanent, temporary, freelance and voluntary roles offered by 107 EJN members in 2021 was 6.296. Table 5 shows that of these 107 organisations, 86% had some permanent staff and 57% had some temporary staff. Freelance contracts were used by 69% of members and 62% offered roles for volunteers who are, by definition, unpaid.

TABLE 5

Permanent, temporary, freelance and voluntary roles in 2021

Sample: 107. Percentages have been rounded to the nearest 0.5%

Categories of employment	Number of employers	% of 107 employers	Number of employees	% of the workforce
Permanent	92	86%	1.211	19%
Permanent full-time	85	79%	735	
Permanent part-time	68	64%	476	
Temporary	61	57%	996	16%
Temporary full-time	31	29%	417	
Temporary part-time	41	38%	579	
Freelance	74	69%	1.345	21%
Volunteering	66	62%	2.744	44%
Totals	**107**		**6.296**	**100%**

The estimated workforce of the whole EJN membership in 2021 is 11.239. The estimated number of people in different categories of employment, including volunteering, is shown in Table 6.

TABLE 6

An estimate of the size of the total EJN workforce

Sample: 107 extrapolated to 191

Categories of employment	Estimated number in 2023
Permanent and temporary employees	3.936
Freelance contractors	2.401
Volunteers	4.900
Total	**11.239**

EUROPE JAZZ NETWORK

Reasons for **changes in the size of the workforce**

For 53% of members, the workforce was about the same size in 2021 as it had been in 2019. For 19% it was larger and for 28% smaller. Twenty-five organisations gave reasons for the change in the size of their workforce. The main reasons for an increase were that:

- the organisation needed more people to get back on track after COVID
- it had been understaffed in 2019 and an increase had been part of its plan
- it had merged with another organisation
- it had not existed in 2019, so there was no basis for comparison

The main reasons given for a reduced workforce were that:

- there were fewer live events in 2021 and festivals were running for fewer days
- online events required fewer staff to deliver them
- some of the roles suspended during the pandemic (when venues were closed and events were cancelled) had not been reinstated by 2021

Other reasons given for a smaller workforce included:

- the economic downturn in many parts of the world
- organisations gaining independence from a larger host organisation
- (for some British organisations) the loss of personnel following the UK's departure from the European Union ('Brexit') and difficulty recruiting replacements

A member in Ireland made this observation:
'Increased costs are affecting audiences as well as suppliers/ production. In Ireland the housing crisis is a major issue affecting a large proportion of the population, including musicians. It's reflected in artwork and also influences the number of musicians who can afford to stay in the music industry and where they are located.'

Gender balance in the workforce

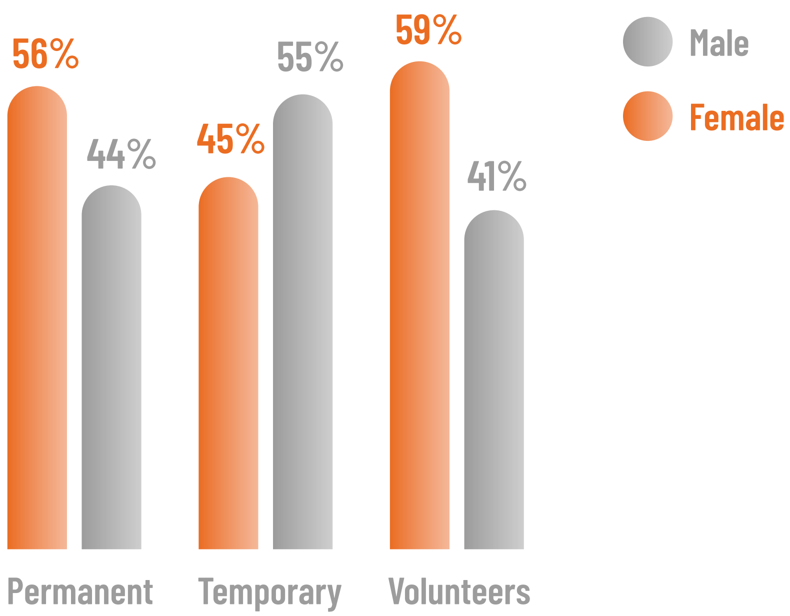
Of the EJN members who provided workforce data 81% were recording the gender of their employees, volunteers and governing body members in 2021. (The survey did not ask them about their freelancers.) Most of the rest of this sample are now collecting this information but a few do not think it relevant.

Chart 8 shows that 56% of permanent employees in 2021 and 59% of volunteers were female. Of the temporary employees, 55% were men. This is explained in part by the fact that more of the temporary, seasonal workers employed by festivals are men. Only three members of the workforce of these 85 members identified as something other than male or female. These numbers are too small to be seen in the chart.

CHART 8

Employees and volunteers, by gender

Sample: 85



Governing bodies and artistic directors

Governing body members of EJN members are more likely to be male. Across 83 organisations, 59% of governing body members were male, 39% female and 2% identified as something other than male or female. (Chart 9)

Of the 90 respondents with artistic directors, 75% of postholders were male, 23% were female and 2% identified as something other than male or female. In one case, the role of co-artistic director was shared by a man and a woman. (Chart 10)

CHART 10

Artistic directors, by gender

Sample: 90 organisations

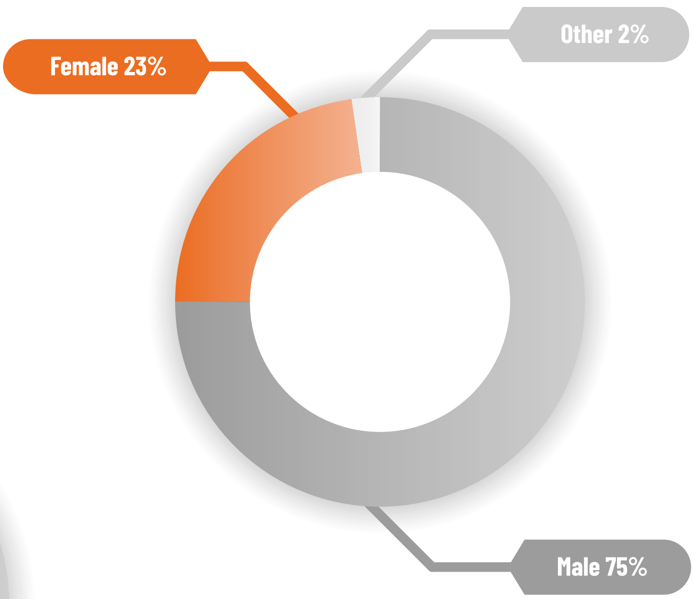
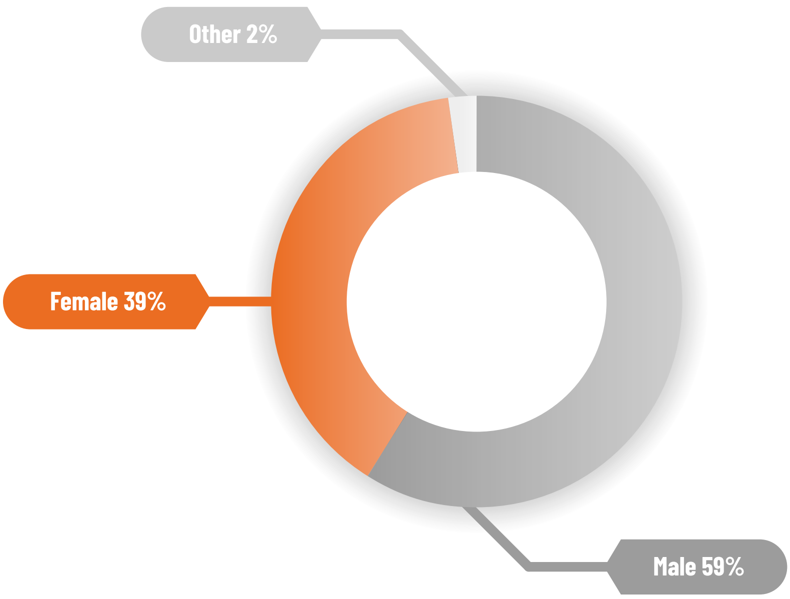


CHART 9

Governing body members, by gender

Sample: 85 organisations



The gender balance of the workforce has reversed since the last *Strength in Numbers* survey. For 2013, members were asked to 'indicate the % gender balance' of their workforce (including volunteers and Board members).

Their answers suggested that 55% of the total workforce were male and 45% female. In 2021, 46% of the workforce of a larger sample of members was male and 54% female.

6. THE CONTINUING IMPACT OF THE CORONAVIRUS

The survey invited EJN members to reflect on some of the continuing impacts of COVID, negative and positive. Their responses describe many similar experiences and analyses but also highlight the fact that organisations operating in distinct local and national contexts, and with diverse purposes, priorities and structures are likely to identify different opportunities and challenges.

The increase in livestreams of performances and other events was one of the most visible outcomes of the coronavirus. This new field of activity necessitated the acquisition of technical and legal knowledge and skills. Members had to learn about the technology but also about copyright. In the field of learning and participation, teachers and workshop leaders had to learn how to design and deliver online sessions to people they may or may not be able to see. Everyone had to learn how to conduct an effective meeting online.

For some EJN members, life was 'back to normal' by 2023. The restrictions had not lasted too long and with some additional government funding they had been able to continue to pay their bills and retain their employees. For most, the pandemic was still affecting their operation.

The workforce

Many people working in the live music sector lost their jobs or feared that they would and they left to look for more secure employment. This was the case for roles in administration, programming, technical teams, hospitality and catering. By 2023, many organisations were still understaffed and having to spend time recruiting and training new colleagues.

One venue summarised its situation like this:

'The wellbeing and resilience of staff was greatly impacted by the pandemic and the aftermath of the restructure and redundancies... A lot of experience and specialist knowledge left the organisation. We are rebuilding with a largely new team.' (UK)

Companies that service concerts, festivals and conferences also lost personnel, many of whom are self-employed. When the worst of the coronavirus had passed, a surge in new, local, outdoor events (designed to bring people together again) intensified the competition for skilled workers.

There was also a shortage of equipment and materials:

'We have had difficulty getting materials and equipment for outdoor events - stages and tents and such, and the personnel to build them. Prices are going up.' (The Netherlands)

'Many sound and lighting engineers quit their jobs when there were less live concerts to work at and many ended up in new professions. Therefore it`s now harder to provide enough technicians for the concerts/ festivals.' (Norway)

Artists and audiences

Programmers were faced with complicated challenges. Some artists who were reluctant to tour again until all pandemic-related protocols (including evidence of vaccination, for example) had been lifted. Artists whose bookings had been cancelled in 2020-21 were being rescheduled and would not be available for another year at least. Venues found that agents and promoters were looking for shorter tours and were excluding some of the regular venues on the circuit.

For organisers of international events, national coronavirus protocols determined which artists and delegates could attend in person and in some cases, online participation was the only option.

Festivals ran for fewer days. This reduced the cost to the promoter and made it more likely that events would sell out. Audience numbers were hard to predict. Artists noticed that promoters were taking fewer risks and those who were less well known, or were playing a less familiar style of music, found it hard to get bookings.

This was highlighted as an issue by several respondents, including these two:

'A lot of artists seem to find it difficult to fill their European tours so the whole tour gets cancelled.' (Sweden)

'We have difficulty convincing our partner venues to book our touring bands.' (Belgium)

Audiences (notably those in the older age group) were slow to return and programmers began to prioritise more popular acts, in an effort to maximise the audience and the income. Many venues and festivals kept social distancing arrangements in place long after they were required to, in order to reassure people that they were safe. This typically meant a smaller number of seats, less ticket income and fewer sales of refreshments and merchandise. Audiences were booking their tickets much later than usual and were more likely to cancel at short notice, or not to turn up.

'People are buying the tickets very late.' (Finland)

'Our audience changed dramatically. We lost 80% of our regular visitors as they were mostly older people.' (Slovenia)

Remote working

The pandemic required many EJN members to adopt new ways of working. Collaborative software (such as Microsoft Teams and Zoom) enabled colleagues within the same organisation to work together remotely. Every administrative task, including signing documents, could now be completed online.

In 2023, many employers were still happy for some of their employees to continue to work remotely, some of the time. It gave employees more flexibility and it saved them travel time and money, and the reduction in travel was likely to be good for the environment. Some organisations reported savings on office costs. It was noted that remote working requires employees to have space in which to work, and for many people in the creative sector, on modest incomes, this is often not the case. Individuals can also feel isolated and miss the experience of working alongside colleagues.

Artists who were unable to pursue their usual public-facing activities (performing, leading workshops and teaching) and who had another source of income (a government grant, a family member or another job) took the opportunity to create new music. They worked alone or in existing ensembles, and with new collaborators they met online.

'Artists had time to work on their music, without the pressure of the next concert. A lot of solo work was done.' (Belgium)

'A lot of new music was written during the pandemic, and there seem to be more collaborations going on between artists that would not have started working together, had it not been that they found each other online during 2020 and 2021.' (The Netherlands)

There were contrasting opinions on whether the creation of new music was wholly positive. The director of an infrastructure organisation observed:

'Some very interesting new music emerged. Many artists have worked in alternate paradigms of audience interaction, inspiring new projects for us. [There has been] significantly more opportunity to exchange ideas with colleagues at home and abroad, in music and other artforms, due to the increased number of online meetings and networking, and our provision of professional development for musicians.'

A festival organiser was delighted that music creators in his country were producing more material for him to choose from, while a programmer in another country thought the market might become over-saturated with new material.

A sense of community

A further benefit cited by respondents was the shared experience of living and working through a pandemic, with the support of EJN. They developed a stronger sense of community and solidarity. While their experiences varied, they were all part of EJN and the EJN team was praised for the way it empowered and supported its members, keeping them informed about how other organisations were dealing with the challenges they were facing and helping them to keep moving forward.

7. THE FINANCIAL PICTURE

The survey asked members to state their total income and sources of income in 2021, and their total expenditure and categories of expenditure, using the headings provided. It also asked for their total income and expenditure in 2019 and 2020.

93 organisations (48% of members) supplied information about income and 92 information about expenditure in 2021. A total of 81 (42% of members) provided totals for 2019 and 2020. (1)

The combined income of 93 members in 2021 was €132,6m. When extrapolated to the full membership, the estimated total is €204,4m.

Changes in income 2019-21

The EJN membership includes organisations of different types and sizes, operating in a variety of national contexts. Their governments' responses to the pandemic, both in terms of the restrictions imposed on activities and the provision of emergency funding, to begin to compensate for the loss of income, made an impact on their results in 2020 and 2021.

Table 7 shows the combined income of 81 members in 2019, 2020 and 2021 and confirms the the negative impact of the pandemic. In 2020, the combined income of these organisations dropped by 27%, from €119,6m in 2019 to €86,8m. By 2021 it had climbed back to €90,4m but was still 24% less than the total in 2019.

TABLE 7

The combined income of 81 EJN members in 2019-21

Sample: 81

Year	2019	2020	% change 2019-20	2021	% change 2019-21
Combined gross income €	**119.609.170**	**86.776.826**	**-27%**	**90.377.021**	**-24%**

Footnote

(1) For most EJN members the financial year runs from 1 January - 31 December. For those whose financial year starts later, the information provided was for 12 months from that date, for example, 6 April 2021 - 5 April 2022. Figures were provided in each respondent's national currency. For 83% this was the euro. The exchange rates used to convert non-euro currencies to euros are in Appendix 3.

The income and expenditure of EJN members range from tens of thousands to millions of euros. Of the 93 organisations providing information about 2021, 12 had an income of under €100.000 and 25 had €1 million or more. For such a wide range of numbers, the median (the middle number in a sequence of numbers organised in order of size) is likely to be more representative of the whole sample than the average (also known as the mean). Appendix 3 explains how the numbers in this section have been calculated. Some of the figures provided by this sample of members have been extrapolated to the full membership, to get a sense of the bigger picture. It is important to be aware that, given the diversity of the membership, their activities and their operating environments, every extrapolation is only an estimate.

Table 8 shows that in 2020 the median income of these organisations dropped by 44% from €595k in 2019 to €333k (these figures are rounded up). It recovered to €402k in 2021 but this was still 32% less than the median income in 2019. Chart 11 provides a visual representation of these figures.

TABLE 8

Median income in 2019-21

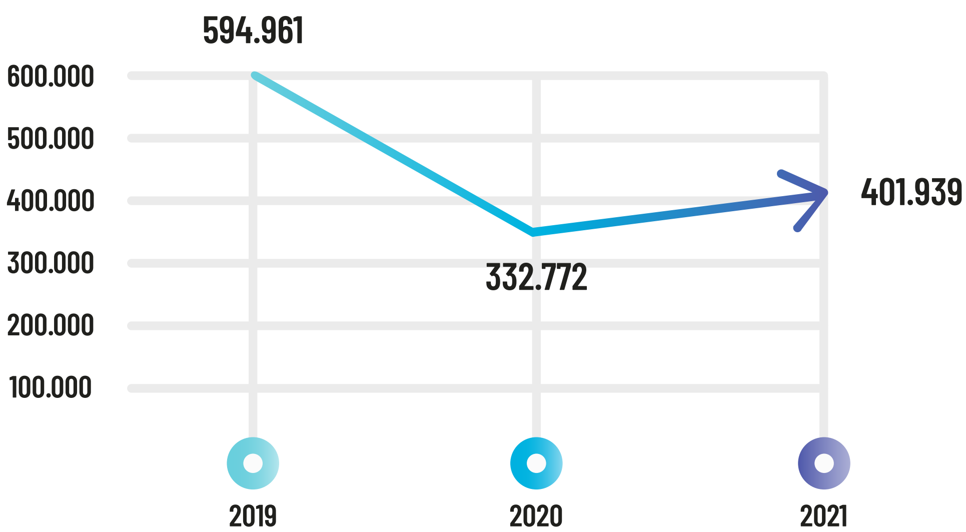
Sample: 81

Year	2019	2020	% change 2019-20	2021	% change 2019-21
Combined gross income €	**594.961**	**332.772**	**-44%**	**401.939**	**-32%**

CHART 11

A visual of median income in 2019-21

Sample: 81



The 93 organisations providing financial information for 2021 had a slightly lower median income of €400k. The findings of this latest survey can now be added to the series published in *Strength in Numbers 2* (2016). As seen in Table 9, with the exception of 2010, members' median income between 2009 and 2014 was higher than in 2019, the year before the coronavirus. (We do not have figures for 2015-2018).

TABLE 9

Median income in 2009-14 and 2019-21

Source 2009-2014: Strength in Numbers 3 (2016)
Source 2019-21: EJN survey 2023

Year	Total income	Median income	Sample size
2009	€ 116,3 m	€ 637.000	58
2010	€ 99,2 m	€ 572.000	50
2011	€ 73,2 m	€ 640.000	38
2012	€ 72,2 m	€ 650.000	40
2013	€ 109,6 m	€ 726.000	58
2014	€ 76,06 m	€ 679.000	47
2019	€ 119,6 m	€ 594.961	81
2020	€ 86,8 m	€ 332.772	81
2021	€ 132,6 m	€ 400.000	93

Sources of income

EJN members of every type and size earn and raise income from multiple sources. Some of these (ticket sales, the sale of refreshments and merchandise, the letting of space) were markedly lower during the pandemic while others (emergency grants from government and their agencies and from grantmaking trusts and foundations, in some countries) increased.

A member in Belgium explained:

'There has been a loss of income on different levels. Ticket sales are lower. People hesitate to come. We rent out our hall to other organisers. That is an important source of income. We lost most of our rental income and we sense it is very hard to [attract] those companies back again.'

Some members had difficulty recruiting and retaining staff and in contracting services after the pandemic, and the cost of materials and equipment both increased. These factors resulted in shorter festivals, the promotion of fewer events and a reduced income from the sale of tickets, refreshments and merchandise. An unexpected development, in some places, was that when lockdown restrictions were relaxed there was a surge in local (and new) events, creating competition for audiences and their spending power.

A member in the Netherlands wrote:

'Our organisation is dealing with the somewhat crazy factor of tourism in the Netherlands picking up in an unsuspected manner after Covid. Hotels are impossible to book or have prices that have doubled since 2019.'

The survey included a list of possible sources of income and respondents were asked to indicate how much they received from each in 2021.

For some, this was a straightforward task. For others, a lack of time to categorise their income in this way, the need to consult colleagues and in a few cases, an organisational policy that treated financial information as confidential determined which figures could be shared. It is important to note that the sources of members' income vary considerably. One might receive most of its income from regional government while another earns most of its income from the sale of tickets and merchandise and has no government money at all. One might attract charitable donations while another might depend on commercial sponsorship.

Chart 12 sets out the percentage of members' combined income from each source in 2021. The top line shows that national governments and their agencies contributed 33% of total income. The second line shows that regional and local governments and their agencies contributed 21%, and so on.

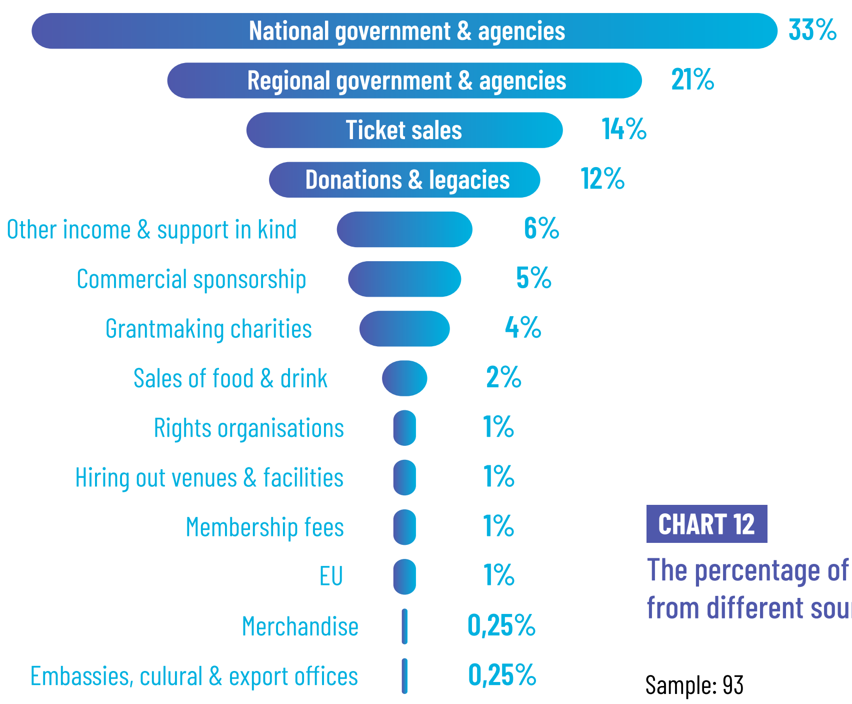


CHART 12

The percentage of income derived from different sources in 2021

Sample: 93

In 2021, national and regional governments and their agencies, the European Commission, embassies, cultural and export offices provided 55% of the combined income of these organisations - a contribution of €44,9m. When this total is extrapolated to the full membership, the estimated contribution of funding from government sources of different kinds, in 2021, is €87,2m.

The extent of national and regional government support for organisations that were unable to generate income in their usual way, during the coronavirus period, varied greatly. In some countries, governments provided emergency funding for cultural sector organisations, in addition to their regular grants. In others there was little or no such support.

Chart 13 compares the main sources of income in 2021 with those in 2013. While the number of members contributing figures for 2013 was almost half the number for 2021, the chart shows that public (government) funding and ticket sales were the two main sources of income in both years.

CHART 13

Income sources in 2013 and 2021

Sample: 2013: 45 organisations, 2021: 93 organisations

It also shows that in 2021, public funding and individual giving were more important. Public funding contributed 55% of total income in 2021 compared with 46% in 2013 and individual giving contributed 12% compared with 2% in 2013.

Ticket sales, commercial sponsorship and venue hire all contributed a smaller percentage than they had in 2013: ticket sales provided 14% of combined income in 2021 compared with 25% in 2013; sponsorship 5% compared with 11% and venue hire 1% in 2021 compared with 7,5% in 2013.

62 EJN members earned a combined total of €11,4m in tickets sales in 2021. The estimated income from ticket sales in 2021 for the whole membership is €25,4m, which is significantly lower than the estimated total of €30,2m for a membership of half the size in 2013.

Of all the sources of income listed in the 2021 survey, regional government and its agencies was the most common, supporting 75% of respondents. Table 10 shows the percentage of organisations that generated income from each source.

TABLE 10

The percentage of members generating income from different sources

Sample: 93

Source of income	% of EJN members drawing income from this source
Regional government and its agencies	75%
National government agencies	59%
National government (direct)	47%
Embassies and cultural export offices	25%
European Commission	8%
Commercial sponsors	41%
Authors and performing rights organisations	20%
Donations and legacies	18%
Charitable grants	11%
Ticket sales	66%
Sale of food and drink	24%
Membership fees	24%
Hire of venues and facilities	24%
Sale of merchandise	18%
Other income and support in kind	39%

Expenditure

Survey respondents were invited to state their total expenditure in 2019, 2020 and 2021 and to itemise their spending in 2021, using the list of categories provided. The latter task was a challenge for some, since organisations categorise their spending in different ways.

A total of 92 members provided information for 2021, 84 for 2020 and 82 for 2019. In cases where no total was given, it was sometimes possible to estimate the total, based on other information provided. In four cases, totals were taken from the organisations' published annual accounts.

The combined expenditure of all 92 members providing figures for 2021 was €127,1m. Extrapolated to the full membership, the total estimated expenditure is €200m. Many members have reported an increase in their costs since the pandemic, notably artists' fees and expenses, third-party services (equipment, catering and labour) and fuel.

For the analysis in Table 11, members that only provided a total for 2021 have been excluded, so that a more accurate comparison can be made across the three years. From 2019 to 2020, spending by this sample of EJN members decreased by 48%, almost double the drop in income (26%, shown in Table 7). In 2021 spending began to rise again, but remained 26% below the figure for 2019. This is also shown in Chart 14.

TABLE 11

Combined total expenditure 2019-21

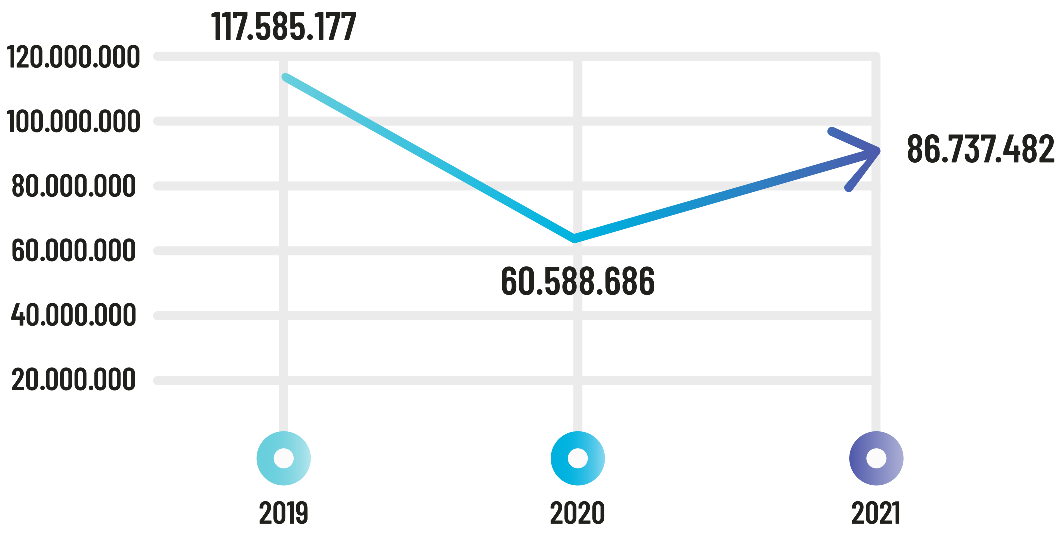
Sample: 2019: 82, 2020: 84, 2021: 85

Year	2019	2020	% 2019-20	2021	% 2019-21
Total spending	117.585.177	60.588.686	-48%	86.737.482	-26%

CHART 14

A visual of total expenditure in 2019-21

Sample: 2019: 82, 2020: 84, 2021: 85



The median expenditure of this sample of 85 organisations in 2020 was 46% below what it had been in 2019. By the end of 2021, it was still 35% below (Table 12 and Chart 15).

TABLE 12

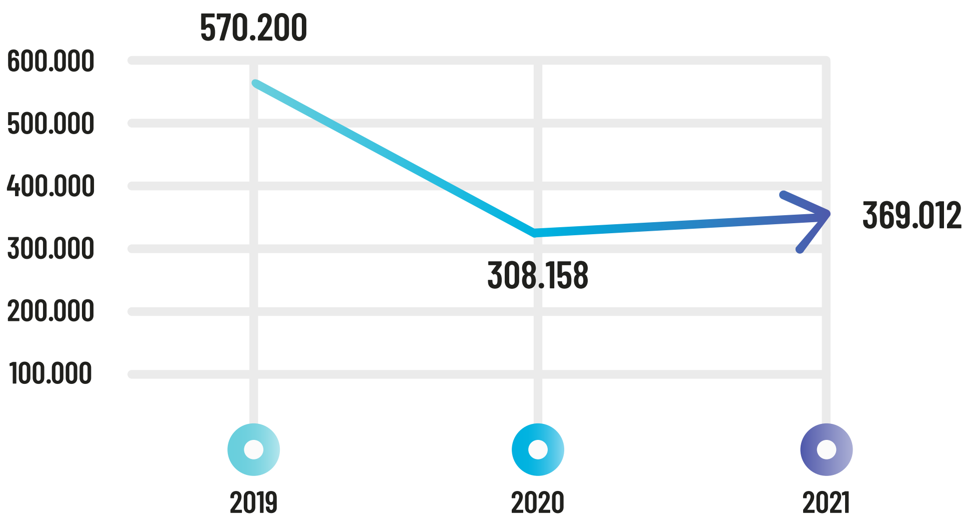
Median expenditure in 2019-21

Sample: 2019: 82, 2020: 84, 2021: 85

Year	2019	2020	% change 2019-20	2021	% change 2019-21
Total spending	570.200	308.158	-46%	369.012	-35%

CHART 15

A visual of median expenditure in 2019-21



The survey included a simplified list of categories on which EJN members spend money. Respondents were invited to detail their spending in 2021, using the list, and 75 did so. Chart 16 gives an overview of their combined expenditure of €62m. Of this, 25% was spent on artists' fees, grants and expenses and 8,9% on venue hire and technical costs in support of artists. Salaries accounted for 25% and office costs (rent, equipment, telecommunications, utilities, travel, insurance) for 31%. Table 13 provides a detailed breakdown.

CHART 16

An overview of spending in 2021

Sample: 75

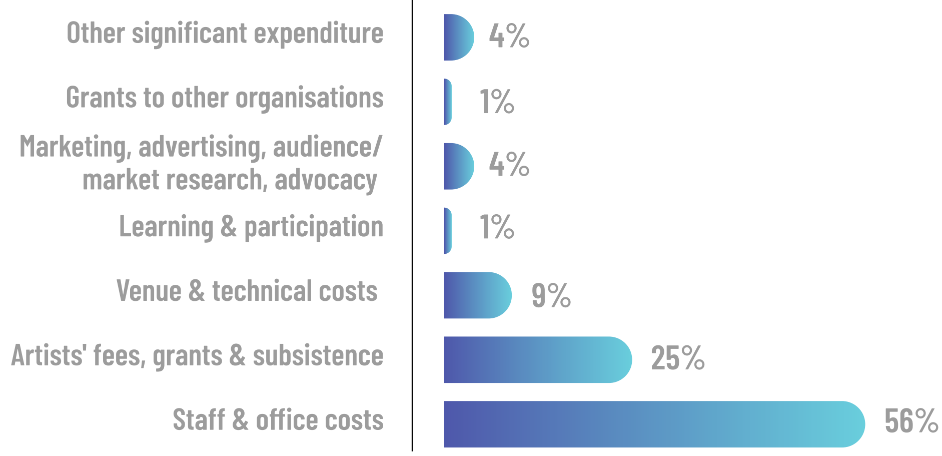


TABLE 13

Spending by category in 2021

Sample: 75

	€	Sub total %
Performance fees for artists in concerts promoted by the member	11.306.498	
Fees for commissions	911.652	
Artists' travel, accommodation and subsistence	2.744.227	
Grants to musicians for national touring	416.555	
Grants to musicians for international touring	228.950	
Spending on artists/musicians	**15.607.882**	**25%**
Technical costs for own concerts, recordings, etc	4.693.421	
Venue hire for own concerts, recordings etc.	810.577	
Venue and technical costs	**5.503.998**	**9%**
Learning and participation	415.134	**1%**
Staff salaries and associated costs, and contractors' fees	15.496.859	
Office costs (rent, insurance, power office suppliers, etc.)	19.369.042	
Staff and office costs	**34.865.901**	**56%**
Audience and/or market research	288.502	
Marketing/advertising	2.335.232	
Advocacy	50.174	
Marketing, advertising, audience/market research, advocacy	**2.673.908**	**4%**
Grants to other organisations	737.399	**1%**
Other significant expenditure	2.291.688	**4%**
Total spending by this sample	**62.095.910**	**100%**

8. CONCLUSION

The primary purpose of most Europe Jazz Network members is to create opportunities for musicians to make music and for audiences to experience it. A smaller, equally important, group of members provide musicians, educators, policy makers and funders, in the field of contemporary jazz, creative and improvised music, with information, advice and practical assistance. The focus of the third *Strength in Numbers* survey - the 2021 financial year - was a year unlike any other. The coronavirus that hit Europe at the beginning of 2020 confronted members with unprecedented operational challenges and in 2021, most of them were still struggling to recover (as described in section 6 of this report).

The membership's response to these challenges has been to turn to each other, as they did throughout 2020. They have continued to pool their knowledge, experience and ideas. They have supported EJN initiatives, such as the identification of good practice in social inclusion through creative music, and the green pilot tours. More members are conscious of their potential to contribute to the quality of life of their local communities and they are more aware of the environmental impact of their activities. They are working differently to achieve more.

Members continue to draw on the collective strength they displayed during and after the pandemic. Since 2021, the fragile state of the economy in many European countries has led to a reduction in government funding for this sector. This has affected the delivery of projects and programmes at home and the ability of members to participate in international events (expos, showcases and conferences).

In countries with weak currencies, where members are paying international artists in US dollars or euros, the costs have risen sharply. New immigration policies and tighter visa regulations in some European countries have also made international touring more difficult. As a result of the UK's departure from the EU, artists are touring less in either direction and there are fewer collaborations involving British and European partners. Some UK members are also feeling the loss of EU citizens from the workforce.

Russia's invasion of Ukraine in February 2022 has had a negative impact on events taking place in neighbouring countries and on fuel prices internationally. It is more expensive for artists, audiences and service providers to travel and for organisations to heat and light their venues and their offices.

'The war has several impacts on us. No tourists from Russia attend our events, and artists don't tour to Russia (via Finland) so it is more expensive and complicated to tour bands in Finland too. All costs have increased.' (Finland)

'War in Ukraine makes people feel unsafe. They tend to save more money, stock up on necessary items and stay at home more.' (Lithuania)

EJN members represent a part of the music sector that is characterised by creativity and improvisation and these characteristics were strongly in evidence during the period covered by this research. The membership of EJN continues to grow steadily and has now passed 200, demonstrating members' conviction that there is strength in numbers.

APPENDIX 1

EJN members who returned the survey

Each member's name is as it appears on the EJN website

Norway (17)	Bergen Jazzforum
	Dokkhuset Scene
	Haugesund International Jazz Festival - Sildajazz
	Kongsberg Jazzfestival
	Midtnorsk Jazzsenter
	Molde International Jazz Festival
	Nassjonal Jazzscene
	Nattjazz
	Nordnorsk Jazzsenter
	Norsk Jazzforum
	Oslo Jazz Festival
	Punkt
	Sørnorsk Jazzsenter
	Stavanger Jazzforum
	Trondheim Jazz Festival
	Vestnorsk Jazzsenter
	Vossa Jazz

France (11)	Association Gwadloup Groove
	AJC Association Jazzé Croisée *
	Association Paris Jazz Club
	Grands Formats *
	Jazz À Juan
	Jazz sous les Pommiers
	JAZZ(s)RA
	Jazzdor, SMAc Jazz à Strasbourg
	Jazzèbre / Strass
	Marseille Jazz des Cinq Continents
	Pannonica / Nantes Jazz Action

Italy (11)	Associazione Culturale Teatro dell'Ascolto / Una Striscia di Terra Feconda
	Associazione culturale nusica.org *
	EGEA Live *
	Empoli Jazz
	Eventi SCRL
	I-Jazz
	NovaraJazz
	Pescara Jazz
	PisaJazz / Circolo ExWide *
	Puglia Sounds – Consorzio Teatro Pubblico Pugliese
	Südtirol JazzFestival Alto Adige

Sweden (8)	Fasching
	Förvaltningen för Kulturutveckling
	Göteborg Artist Centre
	Jazzföreningen Nefertiti
	Norrbottensmusiken
	Semente Cultural Productions
	Svensk Jazz
	Umeå Jazz Festival
United Kingdom (8)	B:Music
	Glasgow International Jazz Festival Ltd
	The Glasshouse International Centre for Music
	Manchester Jazz Festival
	Moving On Music
	Ronnie Scott's Jazz Club
	Serious Events Limited/EFG London Jazz Festival *
	Turner Sims Southampton *
The Netherlands (6)	Buma Cultuur / inJazz
	Music Meeting Festival
	North Sea Round Town
	So What's Next? *
	TivoliVredenburg *
	Jazz International Rotterdam / RAUW
Belgium (5)	JazzLab (part of arts center nona)
	Leuven Jazz
	Noorstarfonds vzw/ Ha Concerts
	VI.BE
	Wallonie - Bruxelles Musiques
Finland (5)	Helsinki Jazz ry
	Tampere Jazz Happening
	G Livelab Tampere
	April Jazz Espoo
	Raahen Rantajatsit / Raahe Jazz on the Beach
Germany (5)	Enjoy Jazz
	Jazzclub Unterfahrt *
	NUEJAZZ
	Stadtgarten Köln
	WOMEX / Piranha Arts
Poland (4)	JazzArt Festival / Katowice Miasto Ogrodow *
	Film and Jazz Music Foundation - Jazz Juniors Festival *
	Vertigo Jazz Club & Restaurant*
	Wytwórnia Foundation*

Austria (4)	Bezau Beatz Festival*
	Jazzfestival Saalfelden
	MICA Music Information Center Austria
	Porgy & Bess
Spain (3)	Plataforma Jazz España
	San Sebastian Jazz Festival - Jazzaldia
	Taller de Músics / JAZZ I AM
Turkey (3)	Istanbul Jazz Festival / Istanbul Foundation for Culture and Arts
	Bozcaada Jazz Festival
	Pozitif Live
Denmark (2)	Swinging Europe
	JAZZ9TUS
Estonia (2)	Estonian Jazz Union (Eesti Jazz Liit)
	Jazzkaar Festival
Lithuania (2)	International Jazz Festival Kaunas Jazz
	Lithuanian Jazz Federation *
Switzerland (2)	Schaffhauser Jazz Festival
	Moods *
Australia (1)	Australian Music Centre
Bulgaria (1)	A to JazZ
Czech Republic (1)	JazzFestBrno
Greece (1)	Technopolis City of Athens / Athens Technopolis Jazz Festival
Iceland (1)	Sólfinna
Ireland (1)	Improvised Music Company
Israel (1)	Synthesizer
Latvia (1)	Riga Jazz (Mūsdienu Mūzikas Centrs/Modern Music Center) *
North Macedonia (1)	Macedonian Association of Jazz Musicians and Free Artists
Portugal (1)	Associação Sons da Lusofonia / Festa do Jazz
Romania (1)	Creative Concept Association - Sibiu Jazz
Slovakia (1)	Na Conxypan Civic Association
Slovenia (1)	Jazz Ravne
111	

* indicates that the respondent did not answer every question relevant to them

APPENDIX 2
The survey

The structure of the survey and some of the questions were discussed by a small, self-selected group of delegates at the EJN Conference in Sofia, in September 2022. Some of them subsequently agreed to complete the draft survey and suggested refinements to it. The survey was formatted in Survey Monkey and first distributed, by email, in October 2022. Every member was also emailed a Word document with the questions, so that they could prepare the information they would need. Where members preferred to answer the questions in Word, their completed surveys were transcribed and entered into Survey Monkey.

It is important to record that some email accounts (particularly Gmail) rejected the invitation from Survey Monkey. While organisations were often able to provide an alternative email address, this problem is likely to have affected the response rate.

The target was 100 responses. In March 2023, EJN sent individual reminders to members and by April 2023, 60 surveys had been returned. The importance of the research to the sector was reiterated at the EJN Conference in Marseille in September 2023 and EJN staff and Board members made individual approaches to organisations until the target had been exceeded, with 111 usable responses.

Ninety-six organisations (86% of the 111) answered most of the questions relevant to them. The most common reason for unanswered questions was that the respondent did not have easy access to the information or the time to research it. Some needed to involve colleagues who were not available, or for whom the survey was not a priority. A few larger organisations found it hard to disaggregate the data requested and in a small number of cases the information was considered confidential, despite assurances that it would not be shared, or attributed to a named organisation in this report.

We are very grateful to all those who did find the time to answer as many of the survey questions as they could.

THE SURVEY QUESTIONS

The introductory text is not included here.

ABOUT YOUR ORGANISATION

1. What is the name of your organisation?

2. In which country is the organisation based?

3. What is your name and what is your role in the organisation?

4. What is your email address?

5. Which of the following best describes your organisation? You can choose more than one answer. Underline or **highlight** your answers.
A club or venue
A festival
A national or regional infrastructure organisation
Something else

If something else, please describe it here

6. On what date in 2021 did your financial year begin?
(For example, 1 January, 1 April etc)

7. On what date did your 2021 financial year end?
(For example, 31 December 2021, 31 March 2022)

8. You belong to EJN because of your involvement in creative music, contemporary jazz and improvised music. In 2021, approximately what % of your resources did you spend on this kind of music?

9. Which of these activities did you undertake in 2021?
Underline as many answers as you like.

We promoted our own concerts
We provided a venue for other promoters
We ran a festival (or festivals)
We made recordings
We commissioned new music
We offered learning and/or participatory activities for individuals and/or groups
offered professional development opportunities, such as training, conferences, networking events
We offered information about music
We offered advice
We ran a music library or archive
We undertook research or contributed to research by others
We advised on local or national government policy on music
We worked to raise the profile of creative music, contemporary jazz and improvised music in our country
We were advocates of creative music, contemporary jazz and improvised music internationally

Something else. Please explain here

YOUR PEOPLE

10. How many permanent, full-time staff was your organisation employing in 2021?

11. How many permanent, part-time staff did your organisation employ in 2021?

12. How many temporary staff did you employ in 2021?
Temporary full-time
Temporary part-time

13. How many self-employed (freelance) staff did you have in 2021?

14. Was your total workforce in 2021 smaller, larger or about the same as it was in 2019, before Covid? Underline or **highlight** your answer.
It was about the same as in 2019
It was larger than in 2019
It was smaller than in 2019
If you want to explain your answer, please do so here.

15. How many volunteers worked for you in 2021?

16. Do you have a governing body? (A board of directors, trustees, or partners, for example) Underline or **highlight** your answer
Yes *No*

17. If you have a governing body, how many members did it have in 2021?

18. In 2021, did you record the gender balance of your workforce?
Yes *No*

19. If you did collect this information, how many of your permanent employees identified as
Female (write number)
Male
Other
I don't know
We had no permanent employees

20. How many of your temporary employees identified as
Female
Male
Other
I don't know
We had no permanent employees

21. Did your artistic director/programmer identify as
Female
Male
Other
I don't know
We had no artistic director/programmer

22. How many of your volunteers identified as
Female
Male
Other
I don't know
We had no volunteers

23. How many members of your governing body identified as
Female
Male
Other
I don't know
We had no governing body

YOUR FINANCES

This information will only be used to describe the finances of EJN's membership as a whole. Please give your answers in your national currency. If any number is an estimate mark it with an asterisk *

24. What is your national currency?

25. What was your gross income of your organisation in 2021?

26. What was you're the gross expenditure of your organisation in 2021?

27. What was your gross income in 2020?

28. What was your gross expenditure in 2020?

29. What was your gross income in 2019?

30. What was your gross expenditure in 2019?

31. If there is anything you want to say about your income and expenditure in 2019 or 2020, please do so here, before we move on to detailed questions about 2021.

YOUR INCOME IN 2021

We appreciate that organisations record their income in different ways. Please provide as much information as you can. If any figure is an estimate, please mark it with an asterisk*. if you want to explain your answers, there is space at Q33.

32. In your own currency, how much money did you receive from the following sources in the 2021 financial year? (There is space at the end to explain your answers if you need to.)

Source	Amount
The European Union	
National government	
A national government agency (for example, an Arts Council)	
Regional and local government, or their agencies	
Embassies and cultural export offices	
Authors' and performing rights organisations	
Membership fees	
Individual donations, including legacies	
Grant-making charities	
Commercial sponsorship	
Ticket sales	
Hiring your venue or facilities	
Sales of food and drink	
Sales of other merchandise	
Include any other income or support 'in kind'	

33. If you need to explain anything about your income 2021, please do so here.

YOUR EXPENDITURE IN 2021

We know that EJN members record their expenditure in different ways. Please provide as much information as you can. If any figure is an estimate, mark it with an asterisk*. if you want to explain your answers, there is space at Q35.

34. How much did you spend on the following items in the 2021 financial year?

Item	Amount (your own currency)
Performance fees for artists, in concerts you promoted yourself (including taxes)	
Artists' travel, accommodation & subsistence	
Fees for work you commissioned	
Hiring venues for events you promoted, for recordings, etc.	
Technical costs for events you promoted, for recordings, etc.	
Learning and participation activity	
Staff salaries, insurance & pension contributions; and fees for contractors	
Office costs (rent, insurance, power, office supplies, etc.)	
Audience research and/or market research	
Advertising and marketing your activities	
Advocacy of creative music, jazz, etc.	
Grants to musicians for national touring	
Grants to musicians for international touring	
Grants to other organisations (festivals, clubs, etc.)	
Other significant expenditure*	

***35. You can provide details of other significant expenditure here**

36. If you need to explain anything about your expenditure in 2021, please do so here.

COVID AND THE CHANGING WORLD

37. What are the continuing negative impacts of the Covid on your organisation? Here are some examples – the loss of income; reduced audience capacity in our venue; difficulty recruiting and retaining staff, difficulty contracting external services, etc.

38. What are the continuing positive impacts of Covid? Here are some examples – we livestream more events; we hold more meetings online and travel less; a lot of new music was written during the pandemic, etc. etc.

39. What other national or international factors, events, or trends are currently influencing the work of your organisation? Here are some example – climate change, energy prices, Brexit, etc.

EVENTS, ARTISTS AND AUDIENCES

Artists, performances, livestreaming and audiences

40. Did you promote artists and / or events in 2021? If your answer is NO please go to Q53. <u>Underline</u> or **highlight** your answer.
Yes *No*

41. How many bands did you promote in the 2021 financial year?

42. In total, how many people attended the live concerts you promoted in 2021? If your number is an estimate, mark it with an asterisk*

43. How many of your 2021 concerts were livestreamed?

44. Were your livestreamed events free? Underline or **highlight** your answer.
Yes, all of them *Yes, some of them* *No*

45. Were your livestreams recorded and available after the event?
Underline or **highlight** your answer.
Yes, all of them were recorded and available
Yes, some of them were recorded and available
They were recorded but not made available
They were not recorded

46. In total, how many people stayed to listen to more than half of your recorded livestreams in 2021?

47. If you want to say more about your livestreaming, or subsequent broadcasts, please do so here.

48. Approximately how many on-stage band members appeared in the concerts you promoted in 2021?

49. How do you record the gender balance of the bands you promote?
Underline or **highlight** as many answers as you like.
We record the number of bands that are all-male, or not all-male
We record the gender of individual band members
We did not record gender balance in 2021, but we do now
We do not record gender balance

50. If you recorded the gender balance of the bands you promoted in 2021, what percentage were all-male?

51. If you recorded the gender of individual band members in 2021, what percentage identified as
Male
Female
Other
They did not say

52. Which of the following statements do you agree with? You can choose more than one. <u>Underline</u> or **highlight** your choices.
We achieved a good gender balance in the concerts we promoted in 2021
We are working to achieve a better gender balance
Gender balance is not a high priority for us

53. If you commissioned composers in 2021, how many identified as
Male
Female
Other
I don't know
We did not commission in 2021

SOCIAL MEDIA

54. How many visitors, or followers, do you currently have online and on social media?

Your website		Your website	
Facebook		Instagram	
Twitter		YouTube	
* Other			

55. If you are using other social media channels, please tell us which

PROMOTING NATIONAL ARTISTS

56. Does your organisation fund or promote national artists?
Yes *No*

If your answer to this question is NO, there are no more questions to answer. Please save and send to [address provided]

57. In 2021, how many artists did you support to perform, in your own country?

58. How many performances did these artists give in your own country, with your support?

59. In 2021, did you support national jazz artists to perform abroad?
Yes *No*

60. If yes, how many artists did you support to tour abroad in 2021?

61. How many individual performances did you support these artists to give abroad, in 2021?

62. Did you organise a showcase in the 2021 financial year?
Yes *No*

63. If you organised a showcase, how many artists too part?

64. Please estimate the percentage of the audiences for your showcase(s) in each of these groups:

Artistic directors, programmers and promoters from your own country
Journalists from your own country

Others from your own country

Artistic directors, programmers and promoters from other countries

Journalists from other countries

Others from other countries

Survey questions ended here.

APPENDIX 3

Notes on the numbers and calculations in the report

The number of responses

112 EJN members returned a survey of which 111 contained enough information to be included in the analysis. This was 58% of EJN's organisational members when the survey closed at the start of December 2023. The full membership was 191 organisations.

The median

The median is the middle number in a sequence of numbers that have been organised by size, usually starting with the smallest. When reviewing a large collection of numbers of very different sizes, the median number is considered to be more representative of the respondents than the mean (or average). The median has an equal number of figures either side of it. For example, the middle number in a list of 45 is the 23rd in the sequence, with 22 numbers either side. In a series where the total is an even number, say 46, the median is the sum of the two central figures (the 23rd and 24th in the sequence) divided by two.

The mean (or average)

This is calculated by adding together all the figures provided (for example, 11 + 60 + 23 + 42 = 136) and dividing the total by the number of figures (136 divided by 4). The mean (or average) figure in this case is 34.

The trimmed mean (or trimmed average)

The trimmed mean prevents the calculation of the mean (or average) from being distorted by a few very large or very small numbers. These very large and very small numbers are known as outliers. To calculate the trimmed mean, all of the numbers are laid out in sequence, from smallest to largest. An equal number of the largest and smallest figures are set to one side. For example, in a series of 86 numbers provided by EJN members in this survey, there might be four numbers much larger than the others. These four and the four smallest are set to one side. The trimmed mean (or trimmed average) is calculated by adding to together the remaining 78 numbers and dividing the total by 78.

Extrapolation

Like previous *Strength in Numbers* reports, this report includes estimates of what some of the numbers would have been if all 191 members had completed a survey. While an extrapolation is always an estimate, it helps to get a sense of the size and impact of the whole membership (as employers, for example). To extrapolate a figure, the trimmed mean is multiplied by the total membership of 191 minus the number of outliers in each case. So, if there are 8 outliers, the trimmed mean is multiplied by 183 (191-8). That figure is then added to the sum of the 8 outliers.

Total income and expenditure figures

This report uses the figures provided by EJN members. Some of the figures are estimates. The report does not differentiate between estimates and audited figures.
In a very few cases, a respondent provided details of income or expenditure but no total, and so a total was calculated using the information provided.
Where information on the total income and expenditure of British organisations had not been provided, we were able to find this in published annual accounts.

Exchange rates

Respondents were asked to provide financial information in their national currency, to save them the time involved in converting it to euros. Non-euro currencies used by 56 respondents were converted to euros using the European Central Bank's historic record of exchange rates. The first trading day of each quarter was used to calculate a rate for the year. The two exceptions were conversions of the Turkish Lira and the Macedonian Denar, which are not covered by the ECB. For these we used figures provided by www.exchangerates.org.uk. No allowance was made for inflation.

European Central Bank	2021	2020	2019
Bulgarian lev	1.95	1.95	1.95
Czech koruna	25.76	26.59	25.69
Danish krone	7.43	7.45	7.46
GBP Pound sterling	0.86	0.88	0.88
Polish złoty	4.56	4.44	4.3
Romanian leu	4.91	4.83	4.72
Swedish krona	10.17	10.59	10.49
Swiss franc	1.09	1.07	1.11
Icelandic krona	150.3	152.7	137.02
Norwegian krone	10.17	10.69	9.79
Turkish lira*	9.8	7.67	6.23
Australian dollar	1.58	1.66	1.61
Israeli shekel	3.86	3.91	4.04
Macedonian denar*	61.6		
	2021 average		

Source: European Central Bank and * exchangerates.org.uk/
Information from North Macedonia related only to 2021 so no conversion was needed for earlier years.

EUROPE JAZZ NETWORK

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