

World Jazz Festival Network

Impact Survey Report

10 November 2020



Rabobank
AMERSFOORT
JAZZ
© Walter Ceyen

Compiled by IKS Cultural Consulting for the Rabobank Amersfoort
Jazz Festival and Foundation JazzNL

CONTENT

Page

Executive summary	1
Context	2
What motivated this research?	3
How did we do the research?	4
What do other similar reports discuss?	6
6. Findings	
6.1 Who were the respondents?	8
6.2 Loss of revenue	9
6.3 Country impacts	9
6.4 Turnover	10
6.5 National relief policies	10
6.6 Strengths and weaknesses	11
6.7 Opportunities and threats	12
6.8 Future perspective on participation in the World Jazz Network	13
7. Case studies	
7.1 Paul Pace, Ronnie Scotts Jazz Club, UK	14
7.2 Sylwester Ostrowski, Szczecin Jazz Festival, Poland	16
7.3 Josh Grossman, Toronto Jazz Festival, Canada	17
7.4 Ülker Uncu, Jazz Holiday Festival, Turkey	18
7.5 Prof. Karendra Devroop, University of South Africa	19
7.6 Mantwa Chinoamadi, Joy of Jazz Festival, South Africa	21
7.7 Philip Woolever, All About Jazz, Germany	22
7.8 Anita Verheggen, Kunstenbond, Sena Performers and Jazz NL	23
8. Options for recovery	
8.1 What help did respondents ask for?	24
8.2 Success in securing relief	24
8.3 Respondents' suggestions about forms of support	25
8.4 Respondents' survival strategies	25
9. What should the world jazz sector look like post-Covid-19?	27
10. What didn't this research cover and where should we focus research next?	28
10.1 Live streaming	
10.2 Expanding and strengthening the network	
10.3 Assessing the economic and social contribution of world jazz	
10.4 Opening the research to speakers of the world's languages	
10.5 Longitudinal strategies for recovery research	
11. What other reports did we consult?	29
12. Thanks, and acknowledgements	32

Executive Summary

Before the SARS CoV-2 virus became the Covid-19 world pandemic, the World Jazz Festival Network's events attracted an audience of more than a million people annually in 19 countries.

Threats

- The pandemic has had a devastating impact on revenue streams and funding for festivals worldwide: 35% reported losing between 75% and 100% of their income.
- 35% of respondents feared being able to continue in the near future; almost all expressed the same fear for continuation over the next 4 years.
- In 2020, all festivals reported cancellation or postponement of festivals in their intended format or on their pre-planned dates.
- Festival respondents from only three countries – Australia, Canada and the Netherlands – reported that their governments gave support to the jazz network.
- Festivals receiving support from their governments expressed far greater optimism about their futures than those predominantly reliant on sponsors and ticket income.
- Responders report greater hesitance among potential audiences about attending live music events.
- The almost total cessation of international travel by 'headline' acts precluded creating an international line-up.
- Older musicians were apprehensive about performing in clubs and travelling internationally.
- Talent development, although still valued, had been de-prioritised in a context where most festivals now have other urgent concerns. Jazz was already a niche market driven more by passion than revenue before the pandemic. The negative impacts noted above forced respondents without subsidies to focus on survival and visibility.

Opportunities

- The festival network demonstrated its strengths, most notably resilience.
- The pandemic gave musicians opportunities to develop stronger technical online skills, permitting more innovative engagement with audiences.
- The development of online streamed events opened attendance to larger international audiences.
- Digital reach is likely to be most effective in attracting new younger audiences and allow the platforming of novel creative and presentation formats.
- Festivals with strong local embeddedness and targeted programmes for groups such as children and the elderly were well placed to adapt to a locally focused post-Covid reality.
- Festivals with an established online presence before the pandemic were in a better starting position than newcomers. They had experience, had built up a fan-base and have already familiarised their audience with the platform and the need to purchase access.

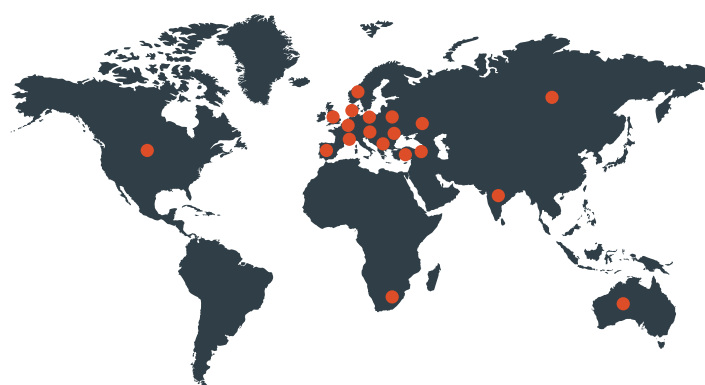


Context

JazzNL is a widely supported Dutch foundation which creates and produces a wide array of activities for Dutch jazz, world and improvised music. The foundation has a strong focus on talent development and internationalisation. It aims to bring together buyers and sellers of talent by various means. One of the biggest events for JazzNL is the network meeting event World Jazz Conference that takes place during the Amersfoort Jazz Festival in the Netherlands. The world jazz conference participants are mostly festivals with a value chain that comprises of influential professionals from across the world. Figure 1 below shows the 19 countries from which respondents were sampled.

World jazz festival network respondents

Figure 1:



The Netherlands

Bulgaria

Norway

Germany

India

Czech Republic

Belgium

Canada

Ukraine

Russia

France

Serbia

Spain

Australia

South Africa

Turkey

Poland

Romania

United Kingdom

The findings of the research demonstrated the need to develop a spectrum of hybrid business models that could form the basis of wide and equitable collaboration among world jazz festival role players. This spectrum ranges from well-funded models in contexts where cultural lobbyists are able to contribute to national policy, to models that can serve contexts where government policy is unsupportive and jazz festival projects are driven by a belief in the societal and creative value of music.

The international literature produced to date by practitioners and researchers on the impact of the pandemic – on music generally and the jazz sector specifically – paints a dismal picture. It highlights the close connection between the downward spiral of the world economy and the devastation of music activities. Respondents demonstrated a sharp awareness of these realities. Nevertheless, they predominantly expressed determination to continue and gratitude for the opportunities offered by this network. They believed the network offered a platform to inspire collaboration towards recovery from the pandemic's negative impact and collective work towards a more positive future.

This report demonstrates the need, now more than ever, for a sector-specific recovery plan for world jazz music, as well as joint initiatives with other creative industry actors and sectors in lobbying governments for effective support.





What motivated this research?



Before 2020, festivals such as the Rabobank Amersfoort Jazz Festival were key platforms where musicians could access audiences, collaborate with artists from other countries, generate income, experience cultural heritage and attract sponsors, in a market that drew millions of music lovers to live performances each year.

From March 2020, Covid-19 ended this virtually overnight. Live music in all genres and on most platforms, including festivals, was cancelled or postponed across the world. Events were suddenly forced to pivot to online platforms or find other new ways to continue their music related activities. The live Rabobank Amersfoort Jazz Festival was postponed in May 2020 and will now take place as an online event from 20 to 22 November 2020. It will take place alongside a World Jazz Festival Conference that aims to exchange ideas and visions, kickstart initiatives for international collaboration on talent development and build an international movement of strong world jazz festivals. The aim of this survey was to feed into those processes by assessing the impact of the pandemic across the diverse festivals network and engaging with respondents and practitioners at all levels of the world jazz ecosystem.

To our knowledge, there has been no study to date specifically focused on the effects of Covid-19 on the international jazz music festival sector. This research aims to fill that gap. The respondents and interviewees whose opinions contributed to this research were drawn from contacts obtained through the Amersfoort Festival database. Both interviews and a questionnaire-based online survey were conducted, and respondents included practicing musicians, academics, artist managers, event organisers, cultural activists, journalists and workers in the jazz festival sector.

Respondents were interviewed after the collation of the questionnaire data. The motivation behind the survey data was not driven by a large number of responses received but more by the quality of information received from network members in order to understand how the pandemic impacted them in their different contexts.

The performing arts in general, and, within them, live music, were particularly hard-hit by virus-related safety measures. The case studies presented here show the existence of a strong sense of resilience and a realisation of the value of collaborations across the sector. Musicians practicing in the world jazz festival value chain used to get most of their income from live performances. COVID-19 has resulted in live music being mostly shut down in countries where the infection rates are high and governments across the world are limiting foreign travel, making it difficult to have an international music career. This stop-start situation is likely to prevail for the foreseeable future, pending the development and roll-out of effective and accessible vaccines and protocols for their use.

Even if there is a vaccine, restrictions will continue because there are over 7 billion people to vaccinate. (Professor Karendra Devroop)

The impact of lockdowns in different countries is assessed primarily from a qualitative point of view, but is grounded in the quantitative data mapping the network. We include options for recovery and enhanced resilience that offer scope for further expansion into practical solutions. These provide discussion items for November's World Jazz Festival Conference.

How did we do the research?

This research set out to investigate the impact of the coronavirus pandemic on respondents' lives as well as their organisations. The **questionnaire** was structured to provide a picture of the festival network before the pandemic and lockdown hit, to depict events during the pandemic and to gather and document respondents' perspectives on the future of the festival network post COVID-19.

Interview questions thus probed attitudes, the diversity of respondents' contexts and their sense-making about responding to lockdowns. Questions explored the role of policy frameworks and regulations in supporting festivals and their value chain. Finally, questions investigated what support is available to network members, and how that can be leveraged to benefit all role players in the world jazz festival network.

Respondents were also offered the opportunity to select options for aiding recovery, strengthening the World Jazz Festival Network and building resilience against future shocks. These aimed to gauge attitudes about support for audience development; Questions explored the role of policy frameworks; diversifying income generation; and enhancing inclusivity.

Data provided by the responses to these questions contributed to answering the overall research questions:

- What has been the impact of the Covid-19 pandemic so far on world jazz festivals and individual members of the organisation?
- What are the perspectives in the world jazz community about the future and the role the organisation can play going forward?
- What resources and strengths can world jazz festivals build on for recovery?
- What kinds of relief support have proved most useful so far and do they suggest strategies applicable elsewhere?



The survey questionnaire built on extensive research conducted for the South African Cultural Observatory (SACO), (which measured the economic impact of the virus on live music in South Africa) and on a study by Concerts SA investigating live streaming in South Africa. It incorporated valuable suggestions and recommendations made by Amersfoort Festival conference organisers Alexander Beets and Floor Visser at the design stage.

The questionnaire was published on IKS Cultural Consulting's website with a shareable link initially circulated by the Amersfoort Festival team who introduced the research to the network. Thereafter, IKS Cultural Consulting followed up with email reminders targeting those who had not responded and additional contacts suggested by the Amersfoort Festival team. The results of all these online inquiries yielded quantitative data, which was collated and analysed. Online interviews were subsequently conducted with World Jazz Festival Network members via Zoom and Google Meets between 8 – 23 September 2020. These sampling and distribution strategies ensured engagement with stakeholders along the whole festival value chain. Information from both questionnaires and interviews was used to yield common themes and add additional nuance.

Analyses of pre-existing desktop research and international literature were also conducted. The account of these in the next chapter outlines the broader industry and socio-economic context worldwide. International research largely concurs with the main findings of this research.

These processes together ensured the data presented is comprehensive and grounded as accurately as possible in current conditions. Thus the data:

- Presents the pre-lockdown situation
- Explores implications for future scenario planning
- Maps the patterns of impact of the pandemic
- Reflects festival organisers' responses

Building on these foundations, the report considers options for accommodating health-related distancing measures and opportunities to monetise online performance platforms. The case studies lay out granular evidence about the contribution of live performance to income, work generation, economic growth, in all of the diverse contexts network respondents come from. The survey further explores the role of policy, legislation, and regulations (including licensing) in facilitating or constraining performance opportunities.

What do other similar reports discuss?

Similar reports discussed the economic impact, an industry that appeared to be collapsing in some countries and a negative outlook on the future of the creative industries. The strengths, weaknesses, opportunities and threats shared by survey respondents revealed that, despite the pandemic, the World Jazz Festival Network's strengths outnumber its weaknesses.

As one example, in an article titled *This is How COVID-19 is Affecting the Music Industry* by Stefan Hall, the 6-month shutdown is estimated to have cost the industry more than US\$10bn in sponsorships, with longer delays being even more devastating. A London Jazz News report of industry research conducted showed that 64% of musicians in the United Kingdom were considering leaving the profession.

The literature also details a range of recovery strategies, both potential and in early implementation. One example is the Independent Music Companies Association's (IMPALA) roadmap to urgently build a five-year recovery plan. Helen Smith, coordinator of IMPALA, has urged the industry to work proactively towards facilitating its recovery. 'As life across Europe gradually takes on some level of normality, a recovery timeline is needed for the cultural sectors,' Smith notes. 'The key is putting the right financial and non-financial tools in place to promote investment in creativity.'

Streaming was widely discussed, both in terms of its viability as a monetisation tool, and the complex regulatory environment. As one example, entertainment and digital media law specialist Gregor Pryor noted in *IQ Magazine* that, in the UK, streamers need to be aware of regulations such as the *Consumer Protection from Unfair Trading* and the *UK Code of Non-Broadcast Advertising and Direct and Promotional Marketing* to avoid facing the Advertising Standards Agency and the risk of being sanctioned. "The technological and operational investment required to operate a stable multifunctional and global online live streaming capability, at scale, is huge," a point underlined by Pryor.

The Digital Futures? Livestreaming in South Africa report by Concerts SA revealed that while online platforms have been essential to ensure the survival of the sector, under lockdown, the revenue levels from live streaming and video-on-demand (VOD) work have not matched earnings from live performance in the case of almost all role players.

For the World Jazz Festival Network to continue as the cornerstone of developing artists' careers it is imperative that the network explores solutions to turn the trajectory away from pessimism and towards proactive strategies, plans and actions that will inspire confidence in the future.

The survey findings further suggest that entities such as this festival network could add value in coordinating a system of reciprocity and sustainable mobility strategies across the world. The collective voice of the predominantly European network could motivate powerfully for increasing the allocation of funds towards world jazz festivals and related activities in future EU budgets in particular; this jazz festival network is predominantly European.

As the industry recovers from the pandemic, it is imperative to ensure that relief mechanisms actually reach the musicians who are the most vulnerable in the value chain. The World Economic Forum reports that without a proven vaccine, less than half of US consumers plan to attend concerts in future. This will directly affect artists, for whom an estimated 75% of income is generated from live shows.

Government and private sector relief funds have been effective in countries such as Canada where there is federal support for individuals, businesses, and landlords.

The revenue generated through online streaming on international platforms such as YouTube and Spotify and the South African Watcha TV has increased sharply over the past five years – although varying and sometimes very small percentages of that income reaches the musicians. Further, the existence of streaming, even where it generates viable musician income, does not eliminate the need and space for live music, which generates experiential, societal and health benefits not provided via digital platforms.

Nevertheless, because music streaming has grown from 9% to 47% of total industry revenues in just six years, future opportunities exist for festival business models to combine digital, live radio and onstage world jazz programming for audience development, and for live festival productions to re-balance their overdependence on live revenue streams.

Developing stronger relationships between the world jazz lobbyists and policy makers from other countries could inform lobbying for more effective government relief strategies. Valuable institutional knowledge exists elsewhere. For example, in Survey Results: Australian Jazz & COVID-19, accessed on *The Usefulness of Art blog*, musician and teacher Adam Simmons provides an overview of the Australian federal government's response to the country's jazz sector.

There, two out of five artists have seen a reduction in physical wellbeing, three out of four a reduction in mental wellbeing during the pandemic to date. Only one in eight was satisfied with the federal government's response to the coronavirus. 'The arts/jazz was not even in the conversation vis-à-vis emergency/ongoing funding support,' Simmons states. In a second article, *Jazz Sector Looks to the Future Despite COVID's Discord*, Simmons writes, 'We need to find grass-roots leadership who will raise these matters to state and federal levels.'

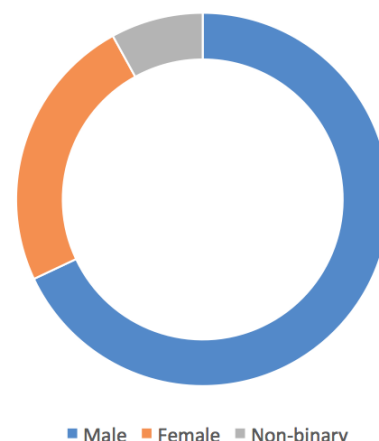
While the experiences of overseas role-players can enhance institutional knowledge, the strength of the World Jazz Festival Network lies in the collective support it can provide for members to shift focus to positive affirmations based on action to stimulate more opportunities for growth.

Findings

This is my main work. It felt like someone ripped it out from under me, like a ship without sails. (Josh Grossman, Toronto Jazz Festival)

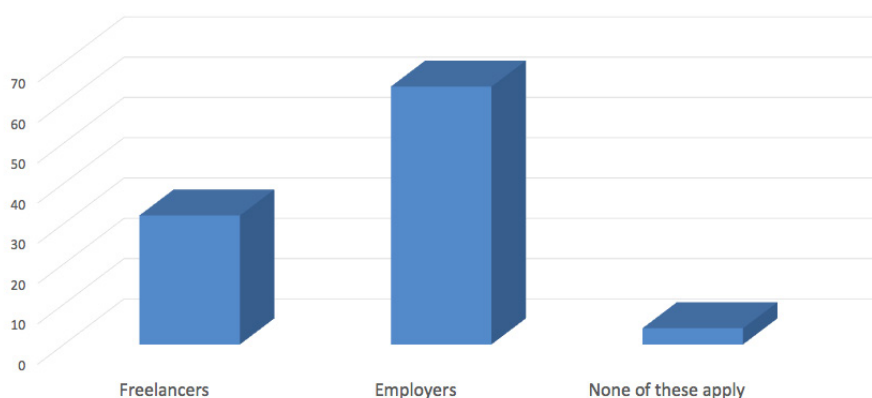
6.1 Who were the respondents?

In terms of career, respondents in the survey show an average of 21 years' experience in the world jazz music sector. In terms of gender, 68% of respondents are male, 24% female and 8% non-binary. The majority (34%) of those surveyed are festival producers. Independent music service professionals, music journalists and platforms for jamming jazz musicians. Sponsors and music publishers represent the smallest cohort at 2%; 5% are venue owners and record label owners. Artist managers represent 14% of respondents; booking agents 7%; while 3% of respondents work in the context of music competitions and export music offices.

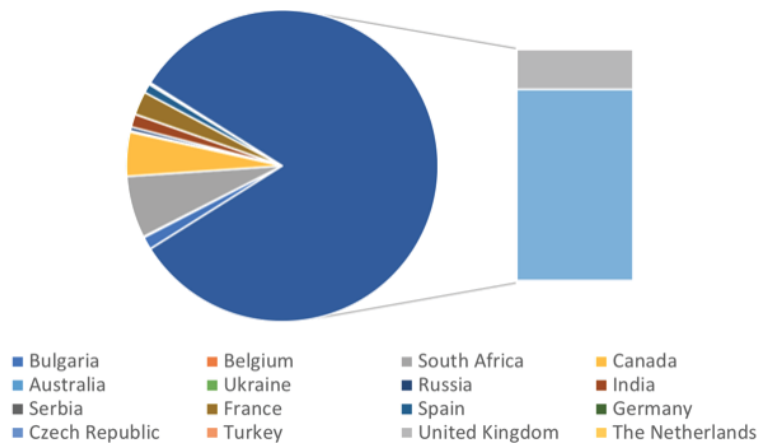


Gender and roles (figure 2)

Rabobank Amersfoort Festival's World Jazz Network is made up of 64% employers who hire full-time wage workers and 32% of role-players who are freelancers, working on a contract basis; 4% are neither.



Respondents by profession (figure 3)



Databases (Figure 4)

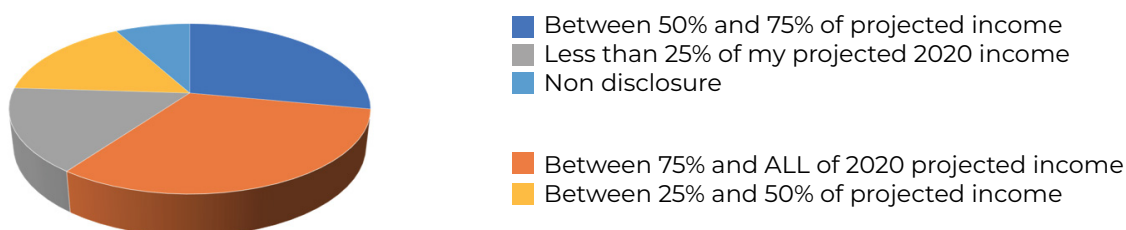
If network members joined forces and engaged in a lobbying campaign, they would be able to reach more than 740 000 people through their databases alone, as indicated in Figure 4 above.

6.2 Loss of revenue

Most network respondents lost between 75% and 100% of their projected music income for 2020. Among the remaining respondents, 30% reported losing between 50% and 75% of their income. 17% reported the loss of between 25% and 50% of 2020 income, and the same percentage the loss of between 0% and 25%.

Respondents representing public funding institutions further predicted that they would see a decrease in their budgets for 2021. The impact was felt most strongly by organisations and practitioners who relied on ticket sales, food and bar sales, wages, sponsorships in kind, and monetary grants that had been cancelled.

Diminished incomes in 2020 (Figure 5)



6.3 Country impacts

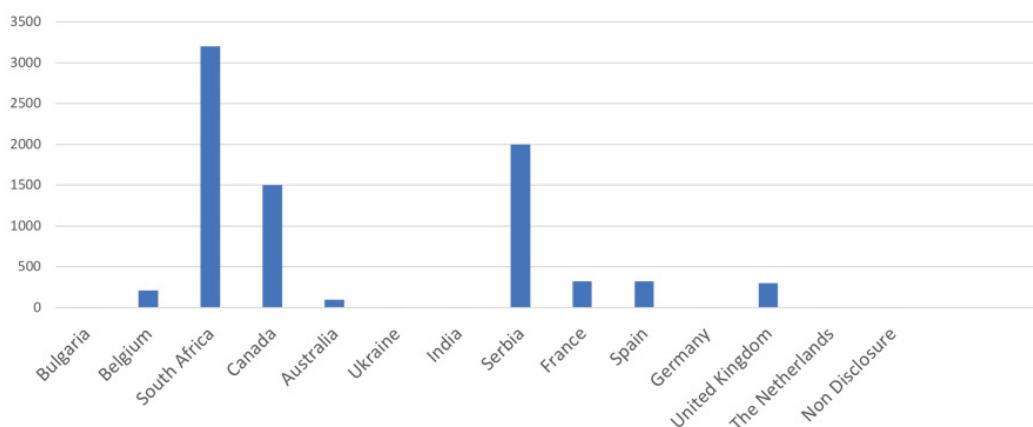
In numbers, these percentages translate into more than 7 990 world jazz music professionals having been negatively impacted by the coronavirus.

Figure 6 shows South Africa, Canada and Serbia as the three countries whose organisations represented the most adversely affected practitioners, although Canada had a more supportive response to the virus. Toronto Jazz Festival director Josh Grossman stated that federal support for individuals, businesses, landlords, and municipality level support for music had worked well in Canada.

6.4 Turnover

In the survey, 40% of respondents did not disclose their annual turnover. The responses of those willing to disclose were converted to the Euro value on 24 September 2020 at a combined total of approximately €8 million. These responses were consistent across both the 68% of respondents who were directly involved with festivals and the 32% who were not.

7990 Affected professionals by country (Figure 6)



6.5 National relief policies

The largest segment of respondents (42%) reported that there was no clear policy for the World Jazz Festival Network in their respective countries, and that in some cases, existing policy may have been affected by adaptations not approved by government. A further 38%, including the Netherlands, said that their country's policy framework was adequate, especially where funding continued despite COVID-related cancellations.

Where relief packages were valid for only up to six months from March, respondents relying on that type of support to survive could plan only for that period. By contrast, 64% of respondents reported being able to plan six to 12 months in advance; 28% one year in advance; and 8% for four years or more in advance because they enjoyed sustained access to funding.

A soon-to-be published survey of the impact of Covid-19 on live music, undertaken for the South African Cultural Observatory (SACO) reports that 68.3% of musician respondents (including functions related to event organisation and administration) reported being aware of the country's Department of Sports, Arts and Culture (DSAC) Relief Funding. However, only 32.6% indicated that they had applied for assistance – many expressing an inability to comply with formal documentation requirements – and only 20.5% reported a positive outcome.

6.6 Strengths and weaknesses

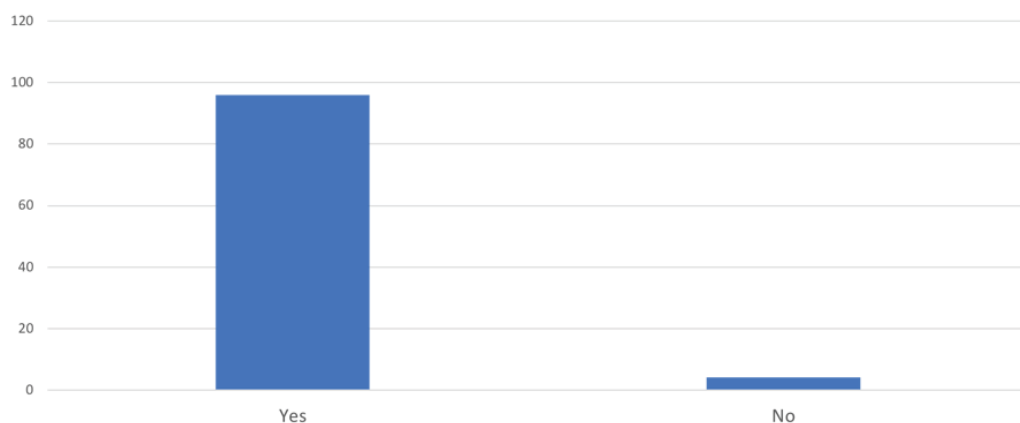
Strengths	Weaknesses
New projects launched to support needy artists	Inadequate professional filming/recording and archiving systems
Ability to unite many different businesses during the festival	For profit festival business models with limited budgets in the context of a weak economy and low live event ticket sales
Innovative concepts for live experiences and world class presentations	Risk aversion on the part of festivals in a highly competitive market that takes major risks in getting brand exposure
Professionally researched and high-quality festival curation	Inability to bring in sponsorship and support for pivots to a new direction
Ability to build audiences by incorporating multiple genres in a festival and introducing artists to new audiences	Poor livestreaming ticket sales
Higher spend on local artists and service providers	Lack of personnel dedicated to outreach activities
A well-organised youth volunteer programme	
An agile operational structure	
A year-round operational structure supporting the creation of sustainable work	
Ability to sell out the majority of shows	
Ability to remain optimistic	
Keeping the organisation afloat despite limited access to funds	
Being accustomed to emergency situations and knowing how to maneuver in them	
Flexibility and open-mindedness	
Able to react quickly and book at short notice	
Being able to organise high profile events	
A strong team	

6.7 Opportunites and threats

Opportunities	Threats
A loyal fanbase that looks forward to the events on a yearly basis	Sponsors doubts about the return on investment in small markets for jazz
Access to touring opportunities through a thriving and committed festival network	The lack of effective marketing initiatives to overseas markets
Stable access to funding	Lack of qualified personnel
Good relations with role players	Limited marketing and communications budgets impacting negatively on audience development
An internationally recognised reputation	More performers than performance opportunities leading to an unsustainable music career for most world jazz musicians
Providing outstanding access to music for free	Inability to access information on new technology
A low-cost operational structure	Lack of capacity to secure other revenue streams
A strong and stable organisational structure	Difficulty of lockdown landscape for organising public events
Free time and less event management panic during COVID-19	A limited funding pool and insufficient reserves for a rainy day in most countries who were represented by survey respondents
Using online platforms to engage with the audience	Uncertainty
Having the equipment and systems for the creation of online content	Unsympathetic venue management insensitive to the needs of audience, musicians, and promoters
Ability to lobby sponsors and municipalities to broadcast concerts on their channels	Over-selective, specialised activities creating limited opportunities to connect with local and broader communities
Regular programming to keep the brand in the public eye	Strict government measures and travel restrictions
Ability to work with advanced technology	A political change in leadership and budgets for world jazz music in some countries
	COVID protocols

Survey respondents said that the impact of the pandemic created more threats than opportunities. This network has limited weaknesses and is incredibly resilient.

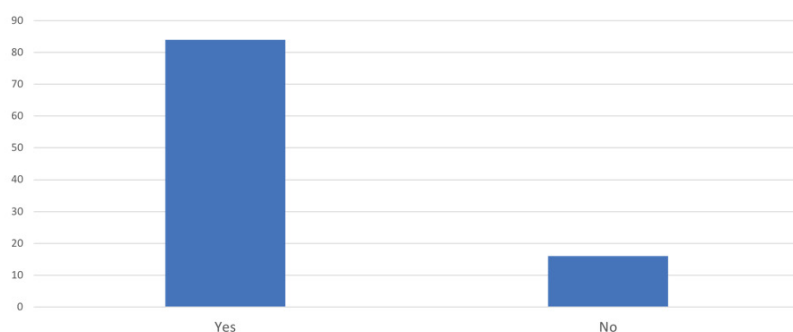
Continue to be part of this network (Figure 7)



6.8 Future perspectives on participation in the network

Of the respondents, 96% said they would like to continue being part of this network. Only 4% expressed that they did not currently have funding in place to host presenters at their festival from other markets. However, they were prepared to investigate this option for the future.

Would you like to contribute to this idea? (Figure 8)



Adding strength to this positive perspective on future collaboration and participation, the majority of those surveyed expressed openness to opportunities to connect with colleagues in similar roles and to share lessons learned from other markets. 84% said they would like to contribute to this idea and 16% said they would not. Those who opted not to contribute felt that their experiences were too limited currently to permit more active participation, or that their interest was mainly in exporting their artists to other festivals.

Case studies

All respondents experienced cancellations or postponements in their programming because of the pandemic. However, the case studies that follow demonstrate the diversity of experiences in the network and nuanced contextual information about the impact of the pandemic. Case studies were selected based on the varied points people made during the interviews. After the following 8 interviewee responses were recorded, we noticed that statements became similar as we interviewed more network members so in order to avoid duplication, we chose these for the different points they communicated.

7.1 Paul Pace, Ronnie Scotts Jazz Club, UK

Respondent Paul Pace, bookings coordinator at Ronnie Scott's Jazz Club and Spice Jazz at the Spice of Life, Soho, UK, contracted the virus on 13 March 2020. He went to an Italian restaurant, felt strange, had a fever, then realised he had the symptoms. At the time of this interview, 11 September 2020, Pace reports continuing feelings of fatigue. From his professional perspective, Pace says he does not think the UK government had adequately evaluated their policies, commenting that there was confusion and uncertainty as to how the lockdown would affect venues such as clubs and restaurants. At Ronnie Scott's, for example, it was decided to cancel performances in the interests of public safety. Furthermore, older musicians did not feel safe coming to London to perform.

Freelance musicians and other workers in the sector were similarly affected by this context of confusion and last minute cancellations. Pace reports that his venue had applied for assistance from a fund of £1.7 billion facilitated through the Arts Council England, but he was unable to say whether this had been successful.

The club had planned to reopen on 1 August. But two days previously, at the end of July, they had to cancel again, and money was lost from the tickets sold, food and marketing. He had learned to be cautious. In London, where at the time of the interview no more than six people were allowed to gather at a table: 'The situation keeps changing and no one can predict what will happen next.' However, Pace reported that most young people did not practice social distancing, so infection rates were high. England had the highest deaths in Europe. He was anxious. If the club had to close, they would be able to survive until June next year. His staff were on a small retainer but they were hopeful that freelance work will come through in the interim.

Ronnie Scott's is a 61-year-old venue with high overheads. For a promoter who is not paying overheads, the loss may be less severe. Prominent venues in London are streaming performances via PayPal. At Ronnie's, donations from patrons are contributing. The club is down to 30 audience members from a previous 100. **Pace regrets having initially offered free live streaming of club events, as he feels this has led to diminishing returns and further undermined the club's ability to earn some form of income.** Pace feels that patrons in general do not want to pay for music, although they could be generous depending on the profile of the artist.

On state policy frameworks, Pace wonders to what extent these are read, digested, and put into practice. **A viable and clear framework could lead to people being employed; his feeling is that policies should be simple to understand so that everyone affected can act on the provisions: 'Music is simple.** We should go back to those principles and not become convoluted,' he says. 'Maybe we should have fewer people involved in trying to make a living from music for it to work. Keep it as concise as possible.'

Notwithstanding the difficult context of the pandemic, Pace believes that the World Jazz Festival Network has the resources to stage an online event such as a gala concert with celebrity artists. The network should be considered as a charity and permitted to raise funds. 'You have to do something different and label it as such so that people buy into it.'

'Creative people are driven to get their message out,' says Pace, adding that maintaining financial viability tends to be difficult for musicians and artists in general. 'There's depression. Jazz is a niche market unless you are well known. Visibility is a struggle unless you have a subsidy. The music industry is not great for making a living; it's a passion business. This network is great as several heads are better than one.' Pace says he has decided to go back to being a grassroots promoter. 'That's where the roots of music are nurtured,' he said. **'Having Bokani Dyer at the Amersfoort Jazz Festival in 2017 and connecting with international professionals was priceless for me. I can't wait to live normally again.'**

On BBC News, Prime Minister Boris Johnson announced that he seeks to win support for a four-week lockdown starting from 5 November 2020. (Chris Mason, 3 November 2020)



7.2 Sylwester Ostrowski, Szczecin Jazz Festival, Poland

We cannot give up. As jazz people, we have to improvise. (Ostrowski)

IKS spoke to bandleader and saxophonist Sylwester Ostrowski via Zoom about his experience. He is based in Poland and owns the rights to the Szczecin City Jazz Festival. He sees this effective partnership as capitalising on his industry knowledge and contributing to building expertise in jazz music with funding from his city government. **Jazz festivals, he believes, are a great tool for promoting cities and creating a favourable environment for an economy to thrive while saving on the costs of publicity.**

Ostrowski's festival employs 10 people who are fully occupied organising not just the ticketed festival but concert tours, and events such as free educational shows for children and concerts for expectant mothers. Before the lockdown, the team produced mainly indoor concerts, with the biggest showcase selling 5 000 seats. **To grow their audiences, they began offering free online streaming five years ago.** Both the Szczecin City Jazz Festival and its online offerings are now among the biggest attractions in Poland, catering for all music enthusiasts from infants to high art jazz lovers.

Ostrowski explains how the virus changed everything for him. Lockdown struck two days before his festival, so the team had to immediately postpone it, renegotiate agreements with all involved and accept losing the money spent on publicity, flights, legal and human resources. Now, however, open air concerts may become more attractive in summer. But audience attendance has been cut from 5000 to 500 people by strict social distancing regulations. Before the pandemic, top artists blocked the right to stream their live performances. Now, it is a requirement because of the limited in-person access.

World jazz music post COVID-19 will never be the same again, he reflects. Yet jazz and good music will survive. Royalties, too, will never be the same again. **The streaming aspects of a performance will now become standard practice whether there is a live audience or not.**

However, the challenge is how to earn additional income from streaming, given that the experiential aspects cannot be comparable to a live performance. Currently, the Szczecin City Jazz Festival is streaming free to grow its fanbase. Luckily they already possess equipment that can produce high-level broadcast quality. Other festivals in Ostrowski's network reported that when they charged for online streams they lost their audiences.

In addition, Ostrowski and his team stage club events for 50 to 60 people. The budget, although adequate at this stage, could create challenging constraints in the context of ambitions to increase scale and the need to generate a good royalty. Now the team is faced with the challenge of putting this differently-platformed festival on the world jazz map. Ostrowski's team have worked 24/7, he says, to reach the level they now occupy, competing with festivals that have been in existence for 50 years. Their original intention was to grow the festival as fast as possible, a strategy to address the question of artists and their copyright. At this festival, artists retain ownership of their intellectual property: an important ingredient in the future financial success of musicians.

The Szczecin City festival network's strength lies in its shared contacts and ideas, and its ability to operate at an internationally professional level. **Although Ostrowski lost 70% of ticket income, luckily, his funders did not withdraw or alter the amount of funding they had allocated to his festival.**

"There is a lot of learning and experience that can go into the work of creating a framework for festivals from this network," Ostrowski believes, **"If you have 10 festivals cooperating so that each festival chooses one group from their country that all festivals would book, this will do wonders for developing artists."** "Everybody should pay the same fee to each artist to make it fair. Maintaining good relationships with your network is vital to the success of all practitioners. It's all about effective communication and delivering good results."

7.3 Josh Grossman, Toronto Jazz Festival, Canada

For a perspective from a long running and experienced festival, IKS spoke to Toronto Jazz Festival director Josh Grossman. The Toronto festival was established in 1987. Grossman narrates how his personal wellbeing affected his work as lockdown was extended. His festival was scheduled for 10 June 2020. Things became difficult when the Canadian government told him to cancel. At first, he took a positive approach, hoping that the cancellation would translate into time for professional training and musical enrichment. But when his kids started their virtual schooling, he had to make virtual plans at the festival too, making it hard to balance work and his family's schedule. He had thought he would have more time to practice his music, but this did not happen. Making the switch psychologically was the most difficult aspect of the pandemic, Grossman says.

Although jazz as an artform will continue to evolve, some musicians and venues might not survive, he feels “Those who have diversified income streams will be fine but those who rely solely on live performance are in big trouble.”

Canada supported their plight at every level, from local government level to national, where funding schemes rolled out in response to the virus. “You were basically approved if you applied,” he explains. “Red tape was not an issue.” Grossman also found that funders would allow festival organisers to defer expenditures to until the project could take place. He says that in situations where the government received more applications for funding than they had bargained for, the state lobbied the private sector and arts patrons in Canada to contribute additional funding.

However, on the business and venue side, levels of satisfaction among those affected varied. Grossman explains that the smaller venues that closed in Toronto had focused on booking emerging artists, the cover charge was not high or consistent, and payment guarantees were not offered. **“It’s a difficult business model. Those who have a maximum capacity of 50 people could not even open because it was not viable.”** Grossman reports that **everybody in his network believes streaming is the way to go, despite the many remaining questions about how to monetise it.**

At a time when many jumped onto the online streaming wave, the Toronto Jazz Festival took its time with online activations. Grossman and his team were not impressed by the quality of videos initially flooding the online market. The Toronto Jazz Festival administrators helped their artist network with DIY tips on how to secure sponsorship for live streaming, and staged free live streamed concerts. Some festivals in the Toronto region produced a combination of live and pre-recorded online broadcasts. Grossman tells us he invested in artists and performers with compelling content and production quality. Even so, he found there was only so much live streaming one could disseminate to connect with an audience.

Post the pandemic, he feels, musicians will be far more tech-savvy. They will be able to engage with their audiences in radically different ways. Sadly, though, he fears older musicians may be left behind because many lack the capacity to engage through new media.

7.4 Ülker Uncu, Jazz Holiday Festival, Turkey

Creative arts organiser Ülker Uncu from the Jazz Holiday Festival in Turkey, explains how her country, support for music organisations depends on political will. In some cases, funding has been switched from some organisations to others more supportive of the ruling party.

Uncu's festival was postponed when Covid-19 struck, and will probably be booking only local musicians going forward because of the risks in contracting international acts. Outdoor concerts will be more viable, because organisers are only permitted to sell half the tickets for indoor venues.

Further venues and freelancers have not been supported through any government Covid-19 relief funds. Uncu reports that in some meetings with government, officials argued that the live music sector did not generate a sufficiently significant tax contribution to the fiscus to merit support. Municipalities have paid musicians for live streaming concerts of an average 25 minute length, which have been broadcast on the Istanbul municipality's YouTube channel. However, an initially small number of views dropped further after June, as audiences lost interest in live streaming when it became possible to go out more frequently. **Nevertheless, Uncu wishes her organisation could access quality equipment for live streaming.**

It has been a very uncertain situation, she says. Many musicians moved back home to seek family support. The coronavirus posed a serious threat to her own health and so she remained indoors until August and could only work online. She feels that it will be more difficult to run her business next year as the economic pressures intensify.

Amid all this uncertainty, people are waiting until the last minute to buy tickets, not knowing whether the government will order further Covid-19-related cancellations or not. Given the absence of official support, Uncu wishes there was a greater level of private sector support for world jazz music in Turkey.



7.5 Prof. Karendra Devroop, University of South Africa

For Professor Devroop, jazz saxophonist and director of the Music Directorate at the University of South Africa (Unisa), 2020 had been set to be a productive year with several live concerts planned, four of them outside South Africa. All had to be cancelled. It is very likely that these performance opportunities will no longer be available even if circumstances improve; artist appearances are scheduled two to three years in advance.

Professor Devroop had expected to release his own latest album in March 2020, but lockdown made it impossible for him to undertake promotion activities or arrange a launch event. His own availability for such activities in 2021 is limited, so he will have to postpone his plans until 2022. The ten artists who perform with him will also have to wait.

As the faculty leader responsible for staging Music Directorate concerts involving 1400 learners (alongside, in 2020, several international acts whose attendance had already been booked), Devroop had to suspend all scheduled concerts alongside Tuition for students also came to a standstill. This has affected all those contracted to the university as music tutors – many of whom have no other form of income.

Thus the pandemic is impacting on all areas of skills development. As one example, Professor Devroop describes the shortage of piano technicians in his teaching environment. There is a danger, he says, that this skill may disappear in South Africa, as most piano-tuners active today are over the age of 70. Unisa partnered with the Netherlands Conservatory to transfer this skill to South Africans. The partners gave a full scholarship to one student who qualified and has been certified as a Steinway technician, the first in Africa. Before the pandemic, this technician was scheduled to be employed by Unisa to train three young black piano tuners as part of an initiative to establish a piano repair centre at the university.

Now this local opportunity has dried up, the technician is instead responding to international demand from, for example, Aspen in the US. As another example, Unisa's Music Directorate had identified two young candidates for training as woodwind and brass technicians. That too has stopped, since such training cannot be conducted solely on online platforms. In these ways, the virus and subsequent lockdowns have impacted all levels of previously ongoing work: both performance and behind the scenes.

Unisa tried to lobby government to assist; the university has no funds to continue supporting music tutors. However, in a context where government Covid-19 relief funding in the arts has no provision for sole contractors, this fell on deaf ears. As noted in the literature survey above, such negative results have been the norm in South Africa.

Outreach activities in townships have also come to a pause. Smartphones and feature phones are widely owned even in impoverished communities, but data and internet access in South Africa constitute both practical and financial challenges. Many areas have poor, often interrupted electricity supply, connectivity is patchy, and data costs are high. Although the Music Directorate has made efforts to develop creative solutions, more than 90% of its projects and activities have come to a standstill.

Professor Devroop has no expectation that things will return to how they were. Many venues have shut their doors or are on the verge of shutting down. Work will be scarce. International acts will be prioritised because they attract larger crowds. **“The A-list artists will be the first in demand and everyone else will struggle,” he predicts.** In a situation where all countries are taking on massive debt, funding in support of the arts is often the first area to be cut by government.



“Unisa has been warned that there will be freezes on salaries and hiring. There will be no increases or bonuses,” he says “As an administrator, I don’t know whether we will be able to do it if the university doesn’t support the concerts.” Nevertheless, he reflects, **“the arts have managed to survive on their own for centuries.”**

Professor Devroop believes artists should promote themselves, engage an impresario, or try to work through a private network such as the World Jazz Festival Network. All these offer routes for collaboration and creating opportunities at all levels within the music sector, nationally and internationally. Participants thinking about how to make this ‘new normal’ situation work post-Covid should consider staging open air concerts to accommodate larger audiences, hold lunch or breakfast festivals, or stage shorter events that could be repeated during a single day. **He notes, though, that such a reconfiguration of concert formats would require everyone to be thinking along the same lines for success.**

A global network such as the World Jazz Festival Network offers the best vehicle available for such collective re-thinks. Practitioners at all levels can collaborate to figure out a new model for the sector. Because it is a global entity, the network can bring significant weight to applications for support from prominent sponsors, and thus improve the chances of securing funding to benefit a greater number of artists. Furthermore, the potential to leverage government and private funding should be considered from a marketing perspective. The World Jazz Festival Network, he believes, should surround itself with the smartest minds available to take advantage of such opportunities.

7.6 Mantwa Chinoamadi, Joy of Jazz Festival, South Africa

Mantwa Chinoamadi is producer of the Standard Bank Joy of Jazz Festival, which is held annually in Johannesburg. For her, this is a depressing time. She tells how artists continue to call her in disbelief: they were looking forward to participating in the festival's 2020 chapter. She believes the live streaming events she has attended need pre-recorded applause to encourage the artists. "Some musicians resort to clapping for themselves," she notes.

To survive the 'new normal' post-lockdowns, her organisation will need financial support: the new platforms being rolled out require additional money. "A whole new business model needs to be developed. How do we grow the industry when there is no return on investment?" she asks. "We need to learn from other countries. We can use platforms like the Joy of Jazz to source funding from government to apply for travelling and artist's tours. Each festival can then administer that project. Perhaps we should approach Coca-Cola, think out of the box, tour an artist in Europe or in America where Coca-Cola is based."

Last year, Chinoamadi applied to the US Chamber of Commerce for funding towards a tour of South Africa by Winton Marsalis. "Nothing came through, not even a response," she says. "Our kids would have been empowered through his teachings and collaborative performances. Our main problem is support for the arts."



7.7 Philip Woolever, All About Jazz, Germany

Music journalist Philip Woolever, originally from the US, has been based in Germany for the past ten years. Prior to his move, he says he was ignorant about the world outside America; coming to Europe opened his mind. Woolever began attending concerts in Germany but found them extremely expensive – and that led him to start writing for the All About Jazz website as a volunteer. He also works at an international school.

“In journalism, a limited number of people can make money,” Woolever explains. In Germany, the national government and individual states support the arts: small concerts and multi-day festivals underwritten by government take place across the country. Although German tax rates can be as high as 60% of income in the upper brackets, German citizens enjoy many returns from these, including in the cultural sphere. “There’s free music everywhere there,” Woolever says. **Even under Covid conditions, Germany and the Netherlands have both been able to facilitate free music outdoors and now musicians are focusing on performing on live streaming platforms.**

During COVID, Woolever says festivals in Germany have pivoted to online, with 300 to 400 performers being live streamed from events featuring mainly German performers, but also some from other neighbouring countries such as France and Belgium. Limited live attendance was also possible – usually for a maximum of 50 people – so some journalists could also be there. Such events set a standard for how it could be done online, he believes, and some have attracted as many as 120 000 viewers from around the world. These productions reminded him of being in a studio while a band was recording. Most bands were from Germany with some from France and Belgium. “It was stunning after not hearing music for three to four months,” Woolever reflects.

He believes we should think of music as “an important part of the social fabric, like schools, roads and security. Music makes us special. We need it. The future will have a social focus and not be capitalistic. At least with taxes, people pay for it whether they use it or not. **If you get something for free by looking at it on a device, you are less likely to go to a concert. As a result, some German youth in their 20s have never been to a live concert.** That’s a strange contradiction, because Germany has an abundance of live shows.” To counter this, Woolever would like JazzNL to create a documentary of its programme as well as its conference, with music integrated, as a way to market the organisation.

Woolever sees dangers in the significant decline in the appreciation for jazz globally over the past 30 years, even genres such as country music have grown. He cites the fact that Rolling Stone magazine now has a section for country music. He feels that there is potential for jazz to grow, but that it is not regarded as sufficiently innovative. “The tendency is to book crossover music to attract audiences,” he notes. **“Having younger performers and a mix of electronics will also help. No matter how good the people are, if they continue with trios, it will be a less popular artform. Most artists start with art-based incentives. That won’t change.”**



7.8 Anita Verheggen, Kunstenbond/Dutch Musicians' Union, Netherlands

Because of the nature of her work, JazzNL board member Anita Verheggen of the Kunstenbond (Dutch Musicians Union) and Sena Performers (a funding body that assists socio-culturally related music projects in the Netherlands) says that she was much busier than usual after the coronavirus hit. Her organisation was busy lobbying government to access additional funding for the 550 COVID relief applications they had received.

Verheggen has more than 43 years' experience in the industry and reports she has never seen anything like this in her life. But as part of Sena Performers, she felt supported by the relief policy established to provide € 1,5 million for musicians to make recordings. The money was matched by the Netherlands Ministry of Culture, producing a budget totalling 3 million Euros, with a deadline for the last round of applications in November 2020.

As part of its mandate SENA subsidises music festivals, and the organisation has insisted that affected festivals pay artists in full regardless of cancellations. It went as far as seeking proof of payment from musicians to ensure that the money went where it was supposed to go. Most musicians were paid 100% of the fee agreed with festival producers. The Netherlands government will provide a further €200 million in the next round of payments to ensure the money does not only go to big institutions. The Dutch Musicians Union (Kunstenbond), together with other cultural groups, will continue to lobby politicians to ensure that relief funds reach musicians. **After the 2008 financial crisis, these organisations realised they need to form a cultural cluster lobby group to be more effective in discussions with government, but it took years to build the coalition.** Because of the pandemic, however, SENA will now collect 30% less money for performing artists. With composers, the situation is even worse. "If we don't stick together, we are done," says Verheggen.

Verheggen believes that the Netherlands government fears the entire economy will collapse. Around 3.6% of its GDP is created by the entertainment industry – more than the contribution from the construction industry. "Young people are protesting because they cannot go to clubs and festivals," she says. "The Amersfoort Jazz Festival secured funding from the Performing Arts Fund because the fund sees potential in their method of collaboration internationally. That is an important acknowledgement and endorsement for our International Jazz/World network."

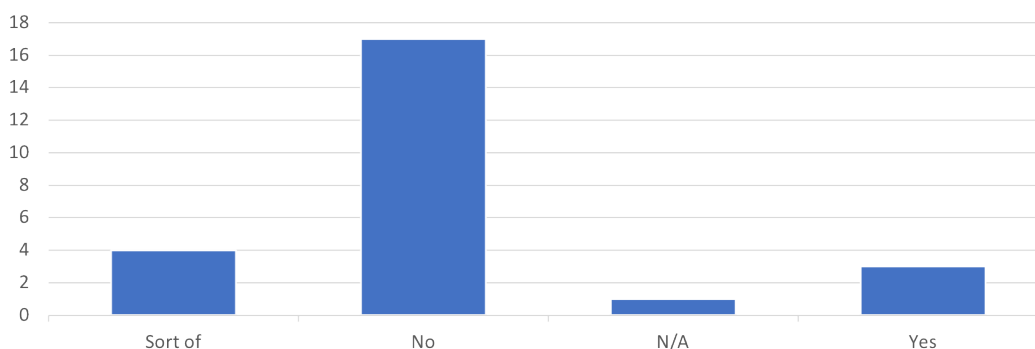
Options for recovery

I think the whole streaming concept and how to make money with that, how to make it work to build a community, will be a big thing. (Elliser van der Molen, director at the JazzNL Foundation)

8.1 What help did respondents ask for?

26% of network members expressed a desire to continue connecting with colleagues in similar roles for knowledge-sharing, followed by 22% of network members who would like to connect with festivals interested in booking their artists and cultural exchange. A further 19% would appreciate a travel and accommodation fund for the network, while 7% wished to explore ways in which JazzNL can support the network, involve the media to grow audiences for the sector and provide funding for artists to develop new projects. 4% of respondents expressed a need for help securing private sponsorships, recording, archiving content, and developing sustainable educational programmes.

COVID-19 relief beneficiaries (Figure 8)



8.2 Success in securing relief

An overwhelming majority (72%) of respondents said they did not benefit from COVID relief funding in their countries, while 12% said they 'sort of' benefitted – often because they were a public agency or administrators of Covid relief funding budgets for artists. Other respondents reported receiving funding related to a different, non-music-related employment source. (Some governments enabled employee access to an advance payment, so that if the individual became unemployed, they would receive a 4-month payment package, but 4% of our research respondents said this was not applicable to their situation.) These responses, taken together, underline the need for the World Jazz Festival Network to build good relationships with policy makers so they can play a proactive role in shaping the frameworks that will impact on the sector's recovery.

8.3 Respondents' suggestions about forms of support

- 30% wanted increased funding to specifically enable artists / businesses to have an international music career.
- 23% wanted free access to government infrastructure (e.g. state theatres, community parks) to create live-streamed music programmes, and financial support to be able to produce a festival.
- 13% wanted a reduction of VAT on essential working equipment (instruments, audio-visual recording gear).
- 8% wanted a deferment of tax.
- 2% wanted low-interest loans and other forms of bridging finance.

Among individual support initiatives, some network members are starting a membership programme for corporate companies. This invites funding contributions to the music sector, at even minimal levels. Other respondents report considering broadcasting as a business model. All these ideas reflect the need of the world jazz sector for improved visibility and support in comparison to other popular genres that in many cases attract more funding.

8.4 Respondents' survival strategies

- 68% of respondents reported reaching agreements with clients to postpone (but not cancel) work to a future date
- 56% said they were:
 - Moving business activities online e.g. meetings and festival production
 - Pre-recording and live streaming festival content
 - Implementing greater flexibility to work from home
 - Working on aspects e.g. practicing, fundraising, archiving, administration, developing innovative ideas that do not require face to face interaction
- 44% reported using the time to upskill or train themselves or their employees
- 28% had reduced the scale of their operations
- 20% had cut the salaries of employees and were applying for a new loan or an extension of a current loan
- 16% are restructuring their businesses
- 8% in each category reported ending the employment of short-term/contract / informal employees; seeking support from other festivals or organisations; seeking support (financial or non-monetary) from friends, family; or entering business rescue
- 4% reported being unable to use any strategies to continue with their business. They had decided to leave the music industry and were selling equipment and assets.

Local musicians reported being supported by festival programmes that produced online content and live-to-air concert series on local radio stations and even created a platform for emerging artists. As travel restrictions continue, some festivals report accommodating international acts by livestreaming their performances from elsewhere. Network participants expressed a strong need to connect local clubs / festivals and organisations through a virtual platform on which music stories could be shared. This would also create opportunities to connect for audience development, not only establishing a professional network for reciprocal cultural trade, but also to support mental wellbeing and social connection.



What should the world jazz sector look like?

Respondents would like to see more world jazz events in partnership with the Amersfoort Jazz Festival, and to benefit from collaborations and audience development initiatives. All would like things to return to what they used to be. However, some believe this will not happen and that there will be losses – but also gains.

The experience of the pandemic will cause future organisational planners to think about preventing potential subsequent waves of coronavirus infection, based on the lessons learned in the past few months. A seated / ticketed event with fewer people than before the pandemic is likely to become more acceptable, both to comply with official guidelines and to build audience confidence. In this context, smaller ensembles and niche events are likely to prove more bookable than expensive large-scale mainstream shows that require big audiences to be financially viable.

The overall healing of the economy will have a profound effect on the success of the world jazz sector, but it will still take some time to heal the industry. Audiences, patrons and sponsors who need to survive may concentrate their spending on the essentials, allocating less money to cultural events. There is no evidence that the age and musical preference of the average audience member will change much, and people will continue to access music, using it to help cope with the stresses the new situation has triggered. Many musicians have been using their down-time to compose new music that needs platforms.

Collaborations, including cross-national collaborations, have been facilitated and made more familiar through the use of online platforms such as Zoom, and are likely to continue at similar levels even after the pandemic. However, this kind of engagement is not possible in conditions of restricted or expensive online access. A major need going forward is for high-quality, affordable internet access.

Travel between countries will remain challenging for some time. Those musicians who stay in music – and the research suggests that, tragically, some will not – are likely to spend more

time doing workshops and educational work than touring. However, any international artists who do travel for live events in the near future are likely to attract enthusiastic audiences, because such events are likely to be rare. This presents a perfect opportunity for emerging artists to attract attention outside their home countries.

However, the future of the world jazz festival sector post Covid-19 could look extremely bleak if no effective vaccine becomes available soon. Business relief is only a short-term strategy; what is needed is a return to some version of previous activities. Even with that, not every organisation will survive.

If events are available in only remote online versions, the live music experience risks being transformed in music consumers' minds into a less appealing, watered-down version of itself. Budgets may fall as governments experience reduced revenue and find themselves unable to maintain or increase their allocations to culture. This makes a lobbying body such as this network even more important for strengthening the relationship with policy makers, sponsors and crowd-funders to advocate for continuing support based on the value world jazz can bring in job creation and the speedy recovery of the economy.

However, this research has revealed that producers are still dedicated to presenting the best possible festivals given their circumstances, and that lobbyists remain determined to continue arguing for jazz to have more access to resources from government, the private sector and crowd-funding. This lays the foundations for reaching new, younger audiences and exercising innovative creativity to present quality music.

What didn't this research cover and where should we focus research next?

10.1 Live streaming - Given the hopes invested in this strategy, further research should be undertaken to investigate, considering best practice examples, the viability of live streaming for the world jazz festival sector as a hybrid business model .

10.2 Expanding and strengthening the network - Additional data needs to be collected to identify those who may not be included in the network, to profile the network's potential and measure collective growth over time. On this basis, the World Jazz Festival Network can invite other jazz festivals to be part of the network to strengthen its bargaining power as it advocates for long-term growth in the sector.

10.3 Assessing the economic and social contributions of world jazz - Given the major economic contribution made by the creative industries overall and noted in earlier chapters, the World Jazz Festival Network would benefit from a similar but more tightly focused assessment of the value and contribution of activities in its sphere. This could provide evidence when motivating governments to strengthen their investments in the sector. Above and beyond the economic benefits that accrue, governments should also be made aware of the priceless contribution music activities in all genres make to health, social wellbeing and the vibrancy of public life. These far surpass quantifiable monetary value.

10.4 Opening research to speakers of the world's languages - Music, it is said, is a universal language. Thus it is regrettable that interviews with respondents who were fluent in English resulted in deeper access to information. Where respondents were less fluent in English their responses were perforce shorter and less informative. In future, some translation and interpretation support in the respondent's preferred language would yield improved qualitative responses.

10.5. Longitudinal strategies for recovery research - Because the pandemic is a rapidly developing but long-run situation, it is recommended that a review of recovery plans and strategies be conducted every two years to track recovery and refine existing strategies, so that they remain relevant to developing circumstances and take advantage of in-process learnings.

What other reports did we consult?

64% Musicians Considering Leaving the Music Profession at <https://londonjazznews.com/2020/08/24/64-musicians-considering-leaving-the-music-profession-survey/> accessed on 2 September 2020

A to Jazz 2019 After movie at <https://www.youtube.com/watch?v=-jIXyDdvFQ9k> accessed on 20 September 2020

Act for Music Donate at <https://act4music.org/product/td-toronto-jazz-festival/> accessed on 7 September 2020

Canada Emergency Response Benefit at <https://www.canada.ca/en/services/benefits/ei/ceerb-application.html> accessed on 7 September 2020

Canada Emergency Wage Subsidy at <https://www.canada.ca/en/revenue-agency/services/subsidy/emergency-wage-subsidy.html> accessed on 7 September 2020

Canada Emergency Commercial Rent Assistance for Small Businesses at <https://www.cmhc-schl.gc.ca/en/finance-and-investing/covid19-cecra-small-business> accessed on 7 September 2020

City of Vancouver(2018) Vancouver Music Strategy Interim Report at <https://vancouver.ca/docs/council/Vancouver-Music-Strategy-Report-2018-07-10.pdf> accessed 29/07/20

COVID-19 Response Effort Initiatives at <https://torontoartsfoundation.org/support-the-arts/covid-19-response-efforts> accessed on 7 September 2020

COVID-19 Resource Centre at <http://www.imc-cim.org/news-imc/imc-news/6393-covid-19-initiatives.html> accessed on 20 August 2020

Dozens of Toronto Live Music Venues to get Tax Break to Help Ease COVID-19 pressures at <https://www.cbc.ca/news/canada/toronto/toronto-mayor-announces-one-point-seven-million-dollars-property-tax-relief-music-venues-1.5694201> accessed on 7 September 2020

Get in your Car. Stay in your Car. Experience CityView Drive-In at <https://cityviewdrivein.com> accessed on 7 September 2020

Government Responses to the Impact of COVID-19 on the Arts and Creative Industries at <https://www.byp-group.com/blog/2020/3/21/government-arts-responses-to-covid-19?fbclid=IwAR3AWGluf35VfhlgUz50bbimzcddxVqK46xcixmtq5V-0fOHCCniUnsfZWI> accessed on 27 July 2020

Going Live: The legalities of Paid Live Streams at <https://www.iq-mag.net/2020/07/going-live-the-legality-of-paid-live-streams/#.XyfaCxMzYnX> accessed on 27 July 2020

How Music Festivals are Surviving Coronavirus Cancellations at <https://www.dw.com/en/how-music-festivals-are-surviving-coronavirus-cancellations/a-54374343> accessed on 2 September 2020

Impala's Crisis Plan and Recovery Roadmap at <https://www.impala-music-covid19.info/crisis-plan-recovery-roadmap> accessed on 20 September 2020

Jazz Sector Looks to the Future Despite COVID's Discord at <https://www.artshub.com.au/news-article/features/covid-19/adam-simmons/jazz-sector-looks-to-the-future-despite-covids-discord-261155> accessed on 2 September 2020

Lockdown: MP Warns of Covid-19 Deaths 'Twice as Bad' as Spring at <https://www.bbc.com/news/uk-54773196> accessed on 3 November 2020

Sena Jazz Laureates at Amersfoort Jazz 2019 at <https://www.allabout-jazz.com/sena-jazz-laureates-at-amersfoort-jazz-2019-by-phillip-woolever.php> accessed on 8 September 2020

TD Toronto Jazz Festival Summer Concert Series at <https://jazz.fm/td-toronto-jazz-festival-summer-concert-series-jazzfm91/> accessed on 7 September 2020

The Financial Impact of COVID-19 on the African Music Sector at <https://www.musicinafrica.net/sites/default/files/attachments/article/202005/miafreport-thefinancialimpactofcovid-19.pdf> accessed on 2 September 2020

This is how COVID is Affecting the Music Industry at <https://www.weforum.org/agenda/2020/05/this-is-how-covid-19-is-affecting-the-music-industry/> accessed on 20 August 2020

We are Witnessing a Cultural Bloodbath in Australia that has been Years in the Making at <https://www.theguardian.com/culture/2020/apr/06/we-are-witnessing-a-cultural-bloodbath-in-australia-that-has-been-years-in-the-making> accessed on 7 September 2020

Thanks, and acknowledgements

We would like to thank the incredible team at the Foundation JazzNL and Rabobank Amersfoort Jazz Festival for commissioning this research and advocating for this network to be strengthened. This research would not have been possible without the valuable insight shared by those who responded to the call for the survey. We would like to specifically thank those who made the time for our research including:

Alexander Beets
 Floor Visser
 Anita Verheggen
 Paul Pace
 Professor Karendra Devroop
 Mahesh Babu
 Adam Simmons
 Mantwa Chinoamadi
 Olivia Ignatescu
 Philip Woolever
 Regis Guerbois
 Loui Lance

Rosa Galbany
 Sylwester Ostrowski
 Thomas Eckardt
 Ülker Uncu
 Josh Grossman
 Ellister van der Molen
 Andre le Roux
 Gwen Ansell
 Michel Peek
 Kgomotso le Roux
 Dr Jill Weintroub
 Monica Newton
 James French





World Jazz Festival Network

Impact Survey Report

10 November 2020