



Supported using public funding by
**ARTS COUNCIL
ENGLAND**



INTERNATIONAL SHOWCASE FUND: IMPACT REPORT 2013-16



 **MUSIC
IS
GREAT**
BRITAIN

CONTENTS

3	About International Showcase Fund
4	Forewords
6	Summary
8	Infographic
10	Financial Impact
13	Artistic Impact, Reach & Diversity
15	Case Studies
21	Methodology
22	About the Partners
24	Acknowledgements

ABOUT THIS IMPACT REPORT

Marking the 10th year of International Showcase Fund (ISF), Nordicity was commissioned to undertake a study of the impacts the Fund has had over the last three years, from 2013 to 2016. With the Fund's growing catalogue of success stories, the study was needed to measure the financial and artistic impacts ISF has had on the careers of UK artists and the return it has generated for the UK's music industry.

We reviewed the funding data and business cases of all ISF beneficiaries over the last three years, and working with PRS for Music Foundation and statistician Paul Foss, assessed the qualitative and quantitative impacts of the Fund within this specific time period. After gathering further data and information on ISF beneficiaries, we interviewed six artists and their managers to acquire a nuanced understanding of each of their experiences and the subsequent impact it had on their career.

ABOUT INTERNATIONAL SHOWCASE FUND

In 2006, PRS for Music Foundation (PRSF) established the International Showcase Fund (ISF), in partnership with Arts Council England (ACE) and UK Trade & Investment (UKTI). British Underground and Musicians' Union subsequently joined the partnership. The aim was to provide financial support for UK artists to reach worldwide audiences at select international industry showcasing festivals and conferences. The target group of this fund is new exporters who are taking their first steps into international markets.

During the three-year period from 2013 to 2016, ISF has invested over £431,000, supporting **146 artists with their teams** (e.g. manager, label, agent, lawyer), which include an average of 4 companies. This means that across the three-year period, ISF has supported **584 UK companies to undertake new export activity**.

England-based artists who have been invited to perform at key industry-focused showcases around the world are eligible to apply for financial support of 75% of eligible

costs for travel, accommodation, visas and per diems (up to £5,000). Applicants must present a strong business case for attending. Assessment criteria are based on the feasibility of the business plan, the track record of the artist applying and the quality of their music. The Fund is highly competitive with only 30% of applicants being selected for investment.

The budget available for this fund is modest. However, in response to increasing demand and competition, it has grown from £130k to £165k since 2013 and other private sector partners will invest as of 2016.

Artists funded by the ISF include Slaves, Kate Tempest, East India Youth, Little Simz, Everything Everything, Woman's Hour, Happyness, Jay Prince, Sam Lee, Bat For Lashes, Wolf Alice, Gabriel Prokofiev, Lewis & Leigh, Wild Beasts, Dan Croll, The Square, Mallory Knox, Fat White Family, Gazelle Twin, Glass Animals, PINS, Bo Ningen, Ghetts, PC Music, DJ Ace, Danny and the Champions of the World, The Wytches, Spiro and MONEY.

FOREWORD FROM ED VAIZEY

Minister of State for Culture and the Digital Economy

The UK's music industry is an important part of the UK economy, representing £4.1 bn of GDP in 2014.¹ Thanks to its talented songwriters and performers, the UK is one of only three net exporters of music in the world, meaning that over 50% of the industry's value (£2.1bn) is revenues from activities overseas. The global success of the music industry's talent goes beyond just the economic, it contributes greatly to our cultural influence and reputation around the world.

PRS for Music Foundation's International Showcase Fund (ISF) with its focus on new exporters is an important contributor to this success. It supports talented musicians, with their managers and labels, to take those crucial first steps into new international markets. For the sample of musicians interviewed for this report, every £1 invested by ISF generated £8.90 in artist revenues. That's a return on investment of nearly 900% for the UK economy. Contributing to this success, 89% of the artists supported over the past 3 years enjoyed a range of direct benefits, securing new deals that have enabled them to increase their international reputation and fan base.



The case studies in this report demonstrate another strength of the International Showcase Fund: the breadth of the musicians it is helping to break into new markets. In recent months, over 20% of the artists supported by the International Showcase Fund are of BAME background and the fund has welcomed music creators working across a broad range of different music genres. This supports the Government's objective that the artistic talent we nurture should reflect the UK's rich diversity.

I'm delighted that a partnership between Arts Council England and UK Trade & Investment has been at the core of PRS for Music Foundation's International Showcase Fund for the past 10 years and that it's now contributing to the GREAT campaign. DCMS and UKTI are committed to working together more closely on global exports over the coming years. This fund, which is opening up new markets and diversifying the music industry's contribution to our cultural exports, is a great example of how we can achieve this.

Ed Vaizey
Minister for Culture and the Digital Economy

¹ Measuring Music 2015, UK Music http://www.ukmusic.org/assets/general/Measuring_Music_2015.pdf

FOREWORD FROM VANESSA REED

Executive Director, PRS for Music Foundation

The International Showcase Fund was established in 2006 to help UK-based artists take their first steps into new international territories. Like many of the funding programmes led by PRS for Music Foundation, it was set up in response to a challenge identified for some of the UK's most talented musicians – the costs of travelling to and performing at industry showcases overseas, which are proven springboards for an international career.

This report demonstrates how important the International Showcase Fund has been to the hundreds of musicians it has supported at crucial stages in their development. It also highlights the quality and diversity of UK music creators this fund is helping and the return on investment their trips have generated. For the vast majority of ISF recipients, tangible creative and business outcomes have accelerated their career to the next level, increasing their reach to live audiences and across digital platforms. For those interviewed for this report, the experience of performing in an international context has also resulted in new artistic collaborations, increased confidence and progress towards a more sustainable career.



The International Showcase Fund's success has been facilitated by the expertise and resources of the various public and private sector organisations involved. Arts Council England, PRS for Music Foundation and UKTI are founding partners with a

longstanding commitment to helping artists take their music to audiences across the world; Musicians' Union and British Underground bring additional support and understanding of the challenges faced by musicians working in different genres. We are hugely grateful for this joint commitment and continued investment.

This report gives us an opportunity to start planning for the next 10 years when we will work with additional partners so that more UK musicians can realise their potential in new markets. At present, we can support 30% of the talented UK artists who've been invited to attend international showcases. Our aim is to better meet musicians' increasing need for support, in line with many of our funding colleagues overseas.

Vanessa Reed
Executive Director, PRS for Music Foundation

SUMMARY

Showcasing is a critical component of the music industry's global infrastructure. It enables artists, promoters, programmers and other music companies to meet in a professional environment, see new work, create new links and strengthen existing ones. It also unlocks potential and creates opportunities for creative collaborations and new business deals.

For artists who are ready to develop their careers in new markets outside the UK, being invited to a B2B showcase can be a pivotal step in becoming a sustainable, exporting artist. It can help open new doors and advance an artist's career, both financially and artistically. Indeed, due to the different tastes of audiences around the world, certain music genres rely on international performances to reach target markets and maximise revenues.

Whilst the opportunity for showcasing is significant, the cost of travelling to these key business markets can be prohibitive. In order to level the playing field for UK artists invited to perform at showcases overseas, the [International Showcase Fund](#) (ISF) provides critical support to artists who would benefit the most from the showcasing opportunity and would not have the means of pursuing it otherwise.

This report is based on Nordicity's analysis of ISF beneficiary data from 2013-2016, alongside a series of stakeholder interviews.² It demonstrates the significant impact of ISF and the important role it has in the sector. Key impacts are as follows:

² The impact analysis was calculated using data provided by all 146 ISF beneficiaries from 2013-2015, and data subsequently reported by 53 of these beneficiaries in the form of an online survey. This data was analysed by independent statistician Paul Foss

- For every £1 of ISF investment, artists generated an additional £8.90 in revenues.
- The total revenue of ISF beneficiaries increased by 143%, from £2,807,812 prior to ISF, growing to £6,823,247 in the last 12 months, generating a cumulative increase of £4 million for the UK music industry and British economy.
- The total export revenue of ISF beneficiaries from international sources increased by 336%, generating a cumulative increase of £1.8 million for the UK music industry and British economy, delivering an ROI of over 400%.
- 89% of ISF beneficiaries over the past 3 years reported a range of tangible business outcomes since receiving ISF investment.
- The average attendance at live performances has doubled for ISF beneficiaries since their international showcase.
- Reach to fans via social media has increased significantly, with the average beneficiary increasing their Twitter followers by over half and nearly doubling their Facebook 'Likes'.
- Musicians working across a vast range of genres are attracted to the fund, with 11 genres supported.
- A notable 23% of investments made in 2015/16 benefited artists from a BAME background.
- Artistic impacts have been significant and include helping musicians to hone their craft in front of live audiences abroad and develop new artistic collaborations.
- Demand for the fund has increased in line with rising costs of international activity and reduced income from traditional sources.
- The fund is highly competitive with only 30% of applications successfully receiving a grant.

International Showcase Fund

2013—2016

Share of investment



International Showcase Fund
75%



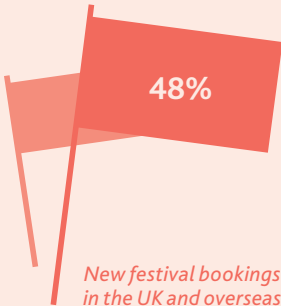
Applicant
25%

Clear business outcomes reported

89%



Record deal



New festival bookings
in the UK and overseas



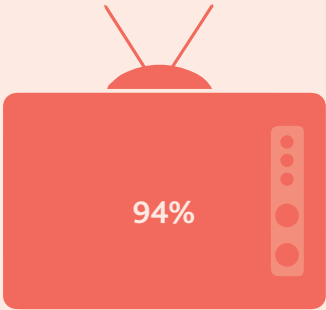
Business
relationships



Gained an agent in
their chosen territory



Overseas tour booked



Significant media and PR engagement
in a new territory as well as in the UK

Other outcomes
11%



Built
fanbase



Media
attention



Industry
relationships

The International Showcase Fund is run by PRS for Music Foundation in partnership with:



High level of competition



Successful grant applications

30%

Increased demand for the fund

2013 — 2015
applications

135

2015 — 2016
applications

201

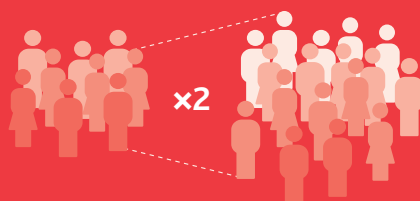
Return on Investment

For every £1 of ISF investment, artists generated an additional £8.90 in revenues



Average live audience increase

Average attendance at ISF beneficiaries' live shows has doubled since their international showcase



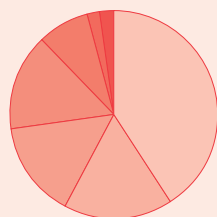
Social media increase

Significant social media reach increase, with Facebook 'Likes' almost doubling



2015—2016 additional data

Genre of those supported



41% Pop/Rock	8% Jazz
17% Folk	2% Classical
15% Electronic	2% Other
15% Urban	



Investments
benefiting artists
from BAME
backgrounds
23%

FINANCIAL IMPACT

The 146 investments made by ISF (2013-2016) have had a considerable impact on the beneficiaries' careers, financial growth and sustainability. British artists, music companies, the UK music industry and the UK economy have benefitted from the Fund's impact on artists' total revenues, export revenues, audience size and social media footprint. Other significant impacts for artists have ranged from securing international record deals and booking tours and festivals overseas, to acquiring international agents, managers and publishers (in the markets in which they performed and others), as well as album and merchandising sales.

TOTAL REVENUE

- For every £1 of ISF investment, supported artists were able to generate an additional £8.90 in revenues, delivering a return on investment (ROI) of nearly 900%.
- The total revenue of ISF beneficiaries increased by 143%, from £2,807,812 prior to ISF support growing to £6,823,247 in the last 12 months, generating a cumulative increase of £4 million for the UK music industry and British economy.
- The average revenue for ISF beneficiaries increased by over £27,000, increasing from an average of over £19,200 to over £46,700.

EXPORT REVENUE

- For every £1 of ISF investment, artists were able to generate an additional £4 in export revenues, delivering an ROI of over 400%.
- The total export revenue of ISF beneficiaries (from international sources) increased by 336%, from £539,182 prior to ISF support up to £2,350,540 in the last 12 months, generating a cumulative increase of £1.8 million for the UK music industry and British economy.
- The average export revenue for ISF beneficiaries increased by over £12,400, increasing from an average of nearly £3,700 to over £16,000.

BUSINESS OUTCOME VALUE³

- A vast majority (89%) of ISF beneficiaries from 2013-2016 have reported tangible business outcomes since receiving ISF investment.
- Business outcomes have included Record Deals (30% of ISF beneficiaries), Securing an International Agent (28% of beneficiaries), New Festival Bookings (48% of beneficiaries), Overseas Tour Bookings (63% of beneficiaries), Business Relationships (42% of beneficiaries) and an increase in Media and PR Engagement (94% of beneficiaries).
- The revenue value of Business Outcomes for ISF beneficiaries has been significant. Of beneficiaries surveyed, an average of 2.4 business results were reported per artist, with an average value of £49,711 of short-term revenue per artist (before the long-tail of returns come into effect).⁴
- Looking ahead, the long-tail of returns project an average £167,250 additional revenue per artist over the next 5 years.

AUDIENCE SIZE

- The total audience size of ISF beneficiaries nearly doubled, from over 28,300 prior to ISF support up to nearly 56,600 in the last 12 months, generating a cumulative increase of over 28,000 audience capacity for the UK music industry.
- The average audience size for ISF beneficiaries increased by nearly 200, increasing from an average of nearly 200 to over 385.

SOCIAL MEDIA FOOTPRINT

- For every £1 of ISF investment, artists were able to reach close to an additional 86,000 Twitter Followers with an ROI of over 85%, and 229,000 Facebook 'Likes' with an ROI of nearly 230%.
- The total social media footprint for ISF beneficiaries has nearly doubled in Twitter Followers from nearly 648,600 prior to ISF support up to 1,032,700 in the last 12 months, and more than doubled in Facebook 'Likes' from nearly 1,090,700 prior to ISF up to 2,115,450 in the last 12 months, generating an increase of nearly 400,000 Twitter Followers and an increase of over 1 million Facebook 'Likes'.
- The average social media footprint for ISF beneficiaries increased by over 2,630 Twitter Followers and 7,000 Facebook 'Likes', increasing by over half from an average of over 4,400 Twitter followers to over 7,000, and nearly doubling from an average of over 7,400 Facebook 'Likes' to over 14,400.

³ ISF partners consider a Business Outcome to be a tangible business result (e.g. record deal, licensing deal, securing new team members or live bookings). The value of such outcomes was reported and projected by online survey respondents.

⁴ In order to derive the Business Outcome Impact, a discrete in-depth survey was completed by 18 of the ISF beneficiaries from 2013-2016.

FINANCIAL IMPACT

Table 1: Average impact ISF has had per artist supported (2013-16)

	Average prior to ISF	Average from last 12 months	Average increase post-ISF	Increase from every £1 of ISF investment
Total revenue	£19,232	£46,735	£27,503	£8.9
Export revenue	£3,693	£16,100	£12,407	£4.0
Audience size/ capacity	194	388	193	6,300
Facebook 'Likes'	7470	14489	7019	229,000
Twitter Followers	4442	7073	2631	86,000

Source: Nordicity estimates of the 146 ISF beneficiaries calculated using a survey sample size of 53 based on data from PRS for Music Foundation and Paul Foss.

Table 2: Total impact ISF has had on the UK music sector (2013-2016)

	Prior to ISF	Last 12 months	Increase post-ISF	Increase percentage (%)	Return on investment (ROI)
Total revenue	£2,807,812	£6,823,247	£4,015,435	143%	891%
Export revenue	£539,182	£2,350,540	£1,811,359	336%	402%
Audience size/ capacity	28,374	56,590	28,216	99%	6%
Facebook 'Likes'	1,090,659	2,115,450	1,024,791	94%	229%
Twitter Followers	648,594	1,032,700	384,106	59%	86%

Source: Nordicity estimates of the 146 ISF beneficiaries calculated using a survey sample size of 53 based on data from PRS for Music Foundation and Paul Foss.

ARTISTIC IMPACT, REACH & DIVERSITY

The **artistic impacts** for ISF beneficiaries have been significant. The ISF has helped support artists to perform and hone their craft in front of live audiences abroad, facilitated artistic collaboration, and in some cases enabled musicians to reach significant creative breakthroughs.

In the following section there are six case studies, each illustrating how ISF beneficiaries have been able to leverage the investment in different ways. Artistic and career impacts shared by several of the beneficiaries interviewed include:

- **developing artistically from international experience** at a critical stage in their career. (This outcome derives from ISF partners' and independent advisors' capacity to judge timing of investments made and openness to differing forms of export readiness).
- **unlocking artistic freedom** made possible by the security of funding/new deals and reduced risk.
- being able to **hone their craft** for international audiences, **develop their artistic voice** and gain traction for future development in the target market.
- **increased confidence, drive and motivation** catalysed by exposure to other thriving artists from the UK and overseas.
- amplifying and **building the momentum of the musician's creative development**.
- **being able to advance their career and their music** without having to resort to pre-mature private sector deals or continuous public funding.

With three in ten applications achieving investment, ISF is a competitive fund consistently **in high demand**. The rise in average total costs and drop in contributions from traditional sources demonstrate how ISF support is now more crucial than ever.

- **Demand for the fund has increased over the past 3 years**, with only 30% of applications receiving funding in 2015 compared with 36% in 2013 and 42% in 2014.
- In line with this increased demand, artists interviewed have experienced **increased costs** associated with showcasing, such as rises in flight and visa costs.
- Noting that financial contributions from traditional sources (such as label tour support) are under increasing pressure, artists interviewed identified the fund as a **key source of investment**, filling a gap between other private and public investments.⁵

⁵ This is based on information provided via ISF beneficiary applications and interviews.

Despite being made available only to artists who have been invited to industry showcases overseas, **the fund's beneficiaries are diverse**, with significant reach across genres and strong female and BAME representation. ISF has worked closely with a diverse range of advisors and ambassadors to achieve this, enhancing awareness and access to the fund.

- From April 2015-March 2016, **23% of ISF beneficiaries were BAME** (Black, Asian and minority ethnic), almost twice the national BAME population proportion.
- In the same year, nearly one quarter (23%) of ISF investments went to **female-only artists**, and another quarter (20%) went to **gender-mixed acts**, exceeding the 16% representation of women earning royalties as songwriters.⁶

- ISF has invested across a diverse **range of genres**, and the mix of those funded generally reflects the mix of those applying. In 2015, 15% of ISF investments were made in urban music (hip hop and R&B/soul), 15% in electronic music and 31% were made in alternative/indie music.
- ISF has developed a network of contacts at **an increasingly broad spectrum of showcases**, and has invested in artists attending a range of diverse events from SXSW in Austin, US, and Canadian Music Week in Toronto, Canada, through to more genre-specific showcases such as A3C (hip hop event in Atlanta, US) JazzAhead in Bremen, Germany, and Americana Music Festival in Nashville, US.



⁶ Statistic provided by PRS for Music

CASE STUDY – KATE TEMPEST

Kate Tempest is a singular British talent, a rap, hip hop music and word artist from South East London. With the help of the ISF, Kate attended SXSW in 2015 and was introduced to a wider American audience beyond the US music cognoscenti, with whom she had already begun to garner critical acclaim.



Her solo album, *Everybody Down* was released in 2014 on the Big Dada label and was nominated for the 2014 Mercury Prize. It was off the back of this album that manager, Toby Donnelly, submitted an application for an ISF grant for attending SXSW in 2015 and planned a consequent US tour for later in 2015. This saw Kate go from playing pub venues prior to her SXSW performance to 1,000-person venues after her album launched, and then to a 40-date US tour in autumn 2015 after the SXSW showcase.

CREATIVE OUTCOMES

- A week in LA studios with producer Rick Rubin (including a sold-out gig in Echo Park).
- A week at SXSW playing 7 shows.
- A week in New York performing to live audiences most days.
- A pre-week of artistic development and networking in LA allowed Kate to spend time with acclaimed producer, Rick Rubin.
- Kate being introduced to and spending session time with five upper echelon mainstream US artists – all with the potential of significant future business and creative opportunities.
- Rich collaborative work with Rick and her own producer, Dan Carey, triggered a key turning point in her artistic career, and will result in a radical new approach for Kate on her new album.

BUSINESS OUTCOMES

- The process of applying to ISF was the catalyst needed to develop their business plan focusing on a key but notoriously difficult market to break for British acts.
- Clear demonstrable commercial impact on tour sales: prior to SXSW, ticket sales for the US tour were modest but as a consequence of the publicity and buzz of the showcases and subsequent gigs in New York, the tour was virtually sold out.
- ISF support has helped Kate to become a sustainable and viable artist without relying on public funding, as well as providing her with artistic independence, which for her multifaceted ability is of heightened importance.
- She has not had to subordinate one type of creative output to another, and has been able to hold out for the right 'deal' for each of her talents.

“ This has been the most successful foreign trip that I have participated in as an artist manager – and this was made possible by the wide range and quality of the contacts we made, from CEOs through to tech investors (and fans!).

Toby Donnelly, manager of Kate Tempest

CASE STUDY – THE SQUARE

The Square are a South London collective at the forefront of the new wave of grime.

They released two singles and an EP in late 2014 and early 2015 on label, No Hats No Hoods, which despite grime having little public recognition in the US, resulted in them being invited to A3C, a hip hop conference and showcase in Atlanta. At the encouragement of ISF partners they successfully applied for the fund which provided the necessary support to be able to attend.

Overall, the experience of seeing as many performances and attending as many meet and greets as they could, has seen the members of The Square develop personally and professionally, giving them the extra drive and desire to make it in the industry. In the few months since A3C in October 2015, the collective and individual members have enjoyed a number of important outcomes.



CREATIVE OUTCOMES

- First ever performance in the US.
- Increased confidence and a hugely maturing influence on the collective, nearly all of whom were still teenagers.
- Were able to mix with and collaborate with many acts in 'green room' environments - this has resulted in the development of more creative material.
- The opportunity to see other inspiring artists perform and witness the professional drive of these acts has had a motivational effect on the crew.
- A3C showcase led to a further showcase performances for band members Elf Kid (with BBC Introducing) and Blakie, both at SXSW 2016 (where grime was a focus in 2016).
- Artistic collaborators were identified, including with a female group from Atlanta called We R Charm who were interested in helping develop a US audience together.

BUSINESS OUTCOMES

- Booked to play in Oslo, Norway directly as a result of attending A3C.
- Mixing with acts in the US at A3C has seen the collective focus on not just creating great music but harnessing business opportunities.
- Established a network of contacts at A3C that was then used to develop relationships at SXSW 2016.
- Met with Peter Rosenberg of Hot 97, the leading hip hop radio station in the US.
- Elf Kid has successfully released a solo single – earning public recognition from Zane Lowe (Beats1) and Annie Mac (BBC Radio 1).
- Both Elf Kid and Blakie have had their own singles on iTunes subsequent to the showcase.
- Recent members have gone on to continue in the business, with Novelist and Syder Sides in particular having solo success.

“Many of The Square have never been to the US before. Getting the chance to interact and learn from other artists has been hugely beneficial and given them a renewed sense of purpose. [We] found the whole experience hugely positive and valuable.

Peter Todd, manager of The Square

CASE STUDY – LEWIS & LEIGH

Drawing upon the rich heritage of their roots in the Deep South and the Welsh Coast, transatlantic duo, Al Lewis and Alva Leigh create a unique blend of Celtic Folk and Americana.



Thanks to their ISF grant, Lewis & Leigh were able to attend the Americana Music Festival in Nashville in September 2015. Attendance at this AMA showcase involved 3 AMA-affiliated performances, participation in a panel discussion on Americana duos, an in-store showcase to various music labels, radio sessions and a number of interviews with the press – all within a 6-day period. ISF has allowed them to reach a sustainable footing in this early stage of their careers, which will provide the basis for them to develop their careers in the US and in Germany, as they plan tours in both countries.

CREATIVE OUTCOMES

- First performances to audiences outside the UK.
- The in-store performance resulted in a whole evening of live on-stage collaboration and artistic development with a range of local artists.
- Performing to audiences steeped in Americana was instructive for their live performance.
- Insight into how they could present themselves on stage, in their general look, artwork and packaging; helping them to develop a sense of branding for their music.
- They were nominated for Best UK Artist and Best UK Song at the UK's inaugural Americana Awards, increasing profile in the UK.
- Have seen interest from other UK artists wishing to collaborate with Lewis & Leigh, including legendary artist Billy Bragg who has invited them to perform with him.

BUSINESS OUTCOMES

- Applying for the ISF developed their business plan and sharpened their focus.
- As a result of the grant, Lewis & Leigh hired a US publicist, who was instrumental in successfully lining up radio sessions, press interviews and the in-store showcase.
- Following AMA performances, Lewis & Leigh have been invited back to New York and LA.
- Following press coverage in Rolling Stone, the duo have now secured a distribution and label licensing agreement for Germany and Austria.
- It is hoped future tours will be financed by advances as a result of their current reputation.
- Having played sub-100 capacity gigs 18 months ago, this year will see the launch their debut album at London's Bush Hall and supporting Rickie Ross (*Deacon Blue*) on a 40-date tour.



ISF allowed us to make a foot-hold in the American market. Without that help, awareness of our music in the US would have been minimal and our ability to progress our careers in the States would've been far slower. The knock-on effect of our appearance has been a greater awareness of our music not only in the US but across mainland Europe. It has also given our story extra credence when working here at home.

Lewis & Leigh

CASE STUDY – DAN CROLL

Liverpool-based, alternative pop, multi-instrumentalist Dan Croll is a solo artist who plays live with a full band, taking inspiration from a breadth of genres. Dan's first single, *From Nowhere*, in late 2010 generated a buzz across the Atlantic, where the single had travelled online. This led to his invite to perform at SXSW in 2013.



The most important impact of this trip was the opportunity to play directly to and establish his new audience in the US and to let word-of-mouth grow 'organically'. This trip also influenced the team's use of digital analytics to identify Dan's audience base and key tastemakers, and thus plan shows either side of the showcase. None of this would have happened without ISF investment, which was instrumental in covering the cost of travel: *"[the] trip has been incredible and something we're still experiencing the impacts of with every tour and release to date"*.

CREATIVE OUTCOMES

- First live performances in the US.
- Increased musical confidence.
- Insight into new audiences.
- Fresh perspective of his own work in a transatlantic context, not just UK.
- By seeing other bands perform and then talking with them, important relationships have been struck.
- New collaborations put in train that will hopefully come to fruition.
- Direct engagement with new live audiences.

BUSINESS OUTCOMES

- Release of debut album, *Sweet Disarray*, a year later on Capitol Records, as a direct result of conversations at SXSW.
- Increased confidence in dealing with industry professionals and a better understanding of the business of being a solo artist.
- Extensive relationship building prior to attendance and at showcase.
- Favourable press coverage up to, during and after showcase, both in the US and in the UK, especially with BBC coverage and Huw Stephens.
- Provided a foothold in the US, which has been cemented with 4-5 return visits, with lengthier tours, bigger shows and a core US following.
- Led to Dan receiving Music Export Growth Scheme investment from BPI and UKTI in 2015.

“ We put a lot of time in to really studying the analytics of plays, streams, and purchases of the single from both a fan base and industry point of view. We were able to look back at previous years of the festival to see which industry leaders had strong ties to the festival and target when and where we could play.

Dan Croll

CASE STUDY – JAY PRINCE

East London-based hip hop artist Jay Prince started recording and producing music in 2011, and launched his career as a live performer in London in 2013. Following two acclaimed EP releases and live performances in London, Manchester and Paris in 2014, Jay was invited to showcase at SXSW in 2015. Having never sought funding before, he successfully applied for ISF. Making the most of the investment which allowed him to pay for his visa and travel to the US, he levered it to embark on an 11 date sold out US tour with Soulection, culminating in a performance at Coachella.



CREATIVE OUTCOMES

- First experience touring and playing to an international festival audience.
- Supported his growth as an artist and live performer.
- Advanced his career at a faster rate, with opportunity to gain international experience at a critical time.
- Launched his new EP at a genre-relevant market.
- Gave debut US performance in context of an event at which he had always aspired to perform.
- Subsequently supported acts including Ghostface Killah, Badbadnotgood, Major Lazer, Snakehips, Raury, and Jay Electronica.
- Increased music online as a result of showcase performance.

BUSINESS OUTCOMES

- Signed a publishing deal with Sony ATV.
- Levered the investment to plan other business activity and a US tour around it.
- Able to reach his significant US fanbase for the first time, where there was high demand for him to perform live.
- Levered his relationship with Soulection (co-signer) and expand his team by working with US-based agent Windish Agency.
- Garnered significant interest from labels and developed new and existing relationships in the US, which could not have been achieved without ISF investment as it “would have been too costly to find funds in time”.
- Increased social media figures.
- Increases in online plays and interest from blogs and specialist music websites have trebled since the showcase performance.
- Earned an additional £3,000 export income from a tour off the back of the SXSW performance.



Without ISF I would not be in the position I am in today both financially and artistically. It gave my career a much needed boost at a perfect time. The funding allowed me to travel to the US to showcase at SXSW and to plot a US tour around it, which helped me to secure a publishing deal. And artistically, it allowed me to grow as a performer, playing to international fans on my first ever tour.

Jay Prince

CASE STUDY – EVERYTHING EVERYTHING

Everything Everything are an English indie band, described by Clash as ‘one of Britain’s Best Pop Bands’. In 2010, they received an ISF grant to attend the CMJ Music Marathon showcase and conference in New York, having spent two years playing pub venues and the small gig venue circuit. The application was made to build on the critical success they were beginning to get, including the nomination for BBC Sound of 2010.



Year by year, Everything Everything have developed and grown, and they see this international showcase as having been an integral part of the developmental process they have been through – a process, which includes 3 albums and 8 further singles since 2010. They consider that the success they currently have – i.e the release of their third album, *Get to Heaven*, its critical success in 2015, and a spring and summer of transatlantic touring in 2016 – the result of seeds sown by their international showcase experience.

CREATIVE OUTCOMES

- 3 performances at CMJ showcasing their then recently released debut album, *Man Alive*.
- Shockwaves NME Awards Tour with Crystal Castles, Magnetic Man and The Vaccines in 2011.
- Critical acclaim with a nomination for the Mercury Prize in 2011 for *Man Alive*, won The Times *Breakthrough Award* in 2011 and recent single *Kemosabe* won UK Single of the Year at the Music Producers Guild Awards.
- Quick progression to recording their second album, *Arc* in February 2012.

BUSINESS OUTCOMES

- Success of their UK autumn tour in 2010.
- The year following CMJ, Everything graduated from small venue circuit to playing a number of the big UK summer festivals, including Glastonbury, Leeds, Latitude and T in the Park in 2011.
- A year and a half of touring singles from the first album.
- The band is continuing to develop and have success 6 years after their showcase and have since released two Top 10 albums, *Arc* and *Get to Heaven*.



The whole thing is a chain reaction, it [current success] wouldn't have happened otherwise.
Everything Everything

METHODOLOGY

A combination of primary and secondary research was used, combining desk research, a document review of material from the ISF partners and a series of one-on-one interviews with artists and managers. The research took place in March and April 2016.

QUANTITATIVE ANALYSIS

PRS for Music Foundation provided programme data for the three-year period of 2013-2016. In this period, ISF made 146 investments in artists, totalling over £431,000. Of these investments, we were able to analyse data from all 146 funding applications, and make further analyses from a follow-up survey where we received reliable data from 53 of these. Therefore, the population size was 146 ('N'=146) and the survey sample size was 53 ('n'=53), representing a 36% response rate and resulting in a margin of error of $\pm 10.7\%$ with a confidence interval of 95% (19 times out of 20).

The survey sample was validated for reliability as it was a self-selecting subset of data. In addition, analysis was undertaken to validate proportional representation of genres, regions and territory of showcase to the overall population, comparing Sample vs Total. Further validation was undertaken via a spread analysis to strip outliers from the data that would skew any averages. The statistics for the total sample data of 53 was

then compared to the reduced sample of data, and assessed for consistency in the patterns, enabling conclusions to be drawn. After determining the full sample of 53 to be useable, caution was exercised in any analysis relating to the entire population of 146.

In order to derive the Business Outcome Impact, a discrete in-depth survey was completed by 18 of the ISF beneficiaries from 2013-2015.

CONSULTATION

A diverse range of artists and managers were identified and invited to participate in consultation interviews. With a focus on ensuring diversity and representation, stakeholders were drawn from a pool of differing genres, backgrounds⁷ and locations across the UK, including solo and group artists, and those with varying experience with and degrees of success from showcasing and international touring. From these categories, a total of nine stakeholders were interviewed.

⁷ Including those with Protected Characteristics (Equality Act 2010).

ABOUT THE INTERNATIONAL SHOWCASE FUND PARTNERS



PRS for Music Foundation is the UK's leading charitable funder of new music and talent development across all genres. Since 2000 PRS for Music Foundation has given more than £23.6 million to over 5,300 new music initiatives by awarding grants and leading partnership programmes that support music sector development. Widely respected as an adventurous and proactive funding body, PRS for Music Foundation supports an exceptional range of new music activity – from residencies and talent development programmes to festivals and showcases in the UK and overseas. PRS for Music Foundation has managed the International Showcase Fund since 2006 and has been delivering the pioneering Momentum Music Fund with public funds from Arts Council England since 2013.

prsformusicfoundation.com

UK Trade & Investment is the Government Department that helps UK-based companies succeed in the global economy. We also help overseas companies bring their high-quality investment to the UK's dynamic economy, acknowledged as Europe's best place from which to succeed in global business. We provide expertise and contacts through our extensive network of specialists in the UK, and in British Embassies and other diplomatic offices around the world.

gov.uk/ukti

Arts Council England champions, develops and invests in artistic and cultural experiences that enrich people's lives. We support a range of activities across the arts, museums and libraries – from theatre to digital art, reading to dance, music to literature, and crafts to collections. Great art and culture inspires us, brings us together and teaches us about ourselves and the world around us. In short, it makes life better. Between 2015 and 2018, we plan to invest £1.1 billion of public money from government and an estimated £700 million from the National Lottery to help create these experiences for as many people as possible across the country.

artscouncil.org.uk



British Underground is an Arts Council England NPO working with export ready musicians and music-makers to help them maximise opportunities at international showcases and conferences. The organisation focusses on genres outside the mainstream producing UK stages, panels and networking events in partnership with SXSW, A3C, Americana Festival, Iceland Airwaves, WOMEX and Porto Musical (Brazil). Recent projects range from hosting Stormzy's first US show with SBTU at SXSW to promoting 16th Century English traditional music at Folk Alliance in Kansas City. We are a long-term partner and advisor to the PRS for Music Foundation's International Showcase Fund and produce new music shows for British Airways.

britishunderground.net

The Musicians' Union represents over 30,000 musicians. We don't have corporate members, which means that everything we do from legal cases to lobbying and from campaigns to negotiations is done in the best interest of musicians. The MU negotiates with all the major employers in the music industry, as well as offering services, benefits and advice tailored to the needs of members at every stage of their careers.

musiciansunion.org.uk

GREAT Britain Campaign - Music is GREAT

Britain is one of the most exciting and thriving cultural destinations in the world, ideal for anyone keen to experience the UK's vibrant music scene and musical heritage.

The country that gave birth to Elgar and the Beatles remains at the forefront of the music scene with acts like Coldplay, One Direction, Adele, Jessie J and Tinie Tempah.

Over 9.5 million music-loving tourists visit the UK to experience Britain's music festivals and gigs. From rock to dance to opera, we put on a fantastic show whatever the weather. Some of these are in inspiring settings and iconic venues from Glyndebourne in Sussex to the Isle of Lewis in Scotland, and the Royal Albert Hall and O2 Arena in London to the SAGE Gateshead in the north of England.

ACKNOWLEDGEMENTS

We would like to express our sincere gratitude to all of the project partners (PRS for Music Foundation, UK Trade & Investment, Arts Council England, British Underground and Musicians' Union) and Paul Foss and Olivia Gable for gathering and analysing data collated for this report.

We would also like to thank all of the artists and managers who contributed to this report without whom we could not have undertaken this study. In particular, we would like to thank Al Lewis, Alessandro 'Moz' Moro, Dan Croll, Jay Prince, Jeremy Pritchard, Everything Everything, Debra King, Mark Sutton, Kate Tempest, Lewis & Leigh, Matt Vines, Peter Todd, Rowan Brand, Slaves, The Square, Toby Donnelly.

PRS for Music Foundation would like to acknowledge the ongoing contribution of the ISF team and partners including Joe Frankland, Bhavesh Patel, Phil Patterson, Ben Lane, Huey Walker, Horace Trubridge, Crispin Parry, Katie Weatherall and all ISF advisors.



The report was written by Stephen Hignell and Balvinder Chowdhary.

Brochure designed by Carbide Digital Ltd

Infographic designed by Jonathan Stanbrook

Photos by Christian Faustus, Ross Trevail, Thomas Jackson, Dan Dennison and Mike Massaro.

The delivery of this report was overseen by Vanessa Reed, Joe Frankland and Liam McMahon.