



International Showcase Fund

PRS Foundation

2016 – 2019 Impact Report

CONTENTS

About the International Showcase Fund	2
About this Impact Report.....	3
Forewords.....	4
Summary of Findings.....	6
The Importance of Showcasing.....	8
Developments of The Fund	9
Infographic.....	10
Financial Impacts	12
Audience and Artistic Impacts.....	15
Cultural Diplomacy, Soft Power and Return on Influence	18
Demand, Diversity and Reach	20
Partnership Working and Recent Developments	22
What's Next for ISF?.....	25
Case Study: Jade Bird.....	26
Case Study: John Smith	27
Case Study: Charlotte Haining.....	28
Case Study: Nubya Garcia.....	29
Case Study: Boy Azooga.....	30
Case Study: Freya Ridings.....	31
Case Study: This is The Kit	32
Case Study: Moses Boyd	33
Case Study: Fatherson.....	34
Case Study: 47 Soul	35
Methodology	36
Award Winners.....	38
International Showcase Fund Partners.....	40

ABOUT THE INTERNATIONAL SHOWCASE FUND

Established in 2006, the International Showcase Fund (ISF) offers support for music creators to take their first steps into international territories. ISF is managed by PRS Foundation in partnership with Department for International Trade (DIT), Arts Council England, British Underground, PPL, the Musicians' Union, Creative Scotland, Wales Arts International, Arts Council of Wales, Arts Council of Northern Ireland and Invest Northern Ireland.

Grants of up to £5,500 and support from fund partners enables artists to perform at key showcasing events and conferences around the world such as Eurosonic (Europe), SXSW (North America), Reeperbahn Festival (Europe), Zandari Festival (Asia), Womex (Europe), Americana Fest (North America), JazzAhead (Europe) and Mutek (North America) which attract thousands of people working in the music industry from every corner of the globe.

From April 2016 to March 2019, the International Showcase Fund supported 364 artists, bands and songwriters and invested over £850,000.



ABOUT THIS IMPACT REPORT

Marking the 13th year of the International Showcase Fund (ISF) since its launch in 2006, Nordicity was commissioned to undertake a study of the impacts the Fund has had over the last three years, from April 2016 to March 2019. This report follows on from Nordicity's International Showcase Fund Impact Report 2013-2016.

A combination of primary and secondary research was used, combining desk research and a document review of material from ISF partners, a series of interviews with beneficiaries, ISF partners and other key stakeholders, and a survey of beneficiaries. The research took place from April to July 2019.

Nordicity analysed ISF programme data for the three-year period consistent with the methodology deployed in the previous Impact Report. A survey administered by Nordicity to 364 ISF beneficiaries achieved 166 completed responses (a response rate of 46%). The survey sample was validated for reliability as it was a self-selecting subset of data. A diverse range of artists and managers were consulted with as part of the research.

We would like to express our sincere gratitude to all of the project partners, music creators and managers who contributed to this report and without whom we could not have undertaken this study. In particular, we would like to thank Vanessa Reed, Joe Frankland, Winnifred Sandy and Liam McMahon at PRS Foundation. The report was written by Stephen Hignell, Shruti Srinivasan and Sophie Hollows of Nordicity.

ISF Impact Report September 2019: Ministerial Foreword by Graham Stuart

Since 2014, HM Government has worked with PRS Foundation and other music industry and public sector partners to give grant support to artists, through the International Showcase Fund.

The fund supports artists in making their first international steps: from performing at showcases to taking part in camps for songwriters and writer-producers. Artists who have benefited from this support include BRIT Award winner Sam Fender, Mercury Prize winner Wolf Alice, Jade Bird with her appearance on The Tonight Show with Jimmy Fallon and Nilüfer Yanya who performed on The Late Show with Stephen Colbert.



Enabling UK artists to expand into new markets and promote their work to industry executives is as important as ever, as technology, through streaming and social media, is making music from across the world instantly available and increasing global competition.

The International Showcase Fund provides that vital initial route to market for UK artists from different music genres, including folk, jazz, electronic, grime, hip-hop, world music, classical and Americana, to perform at music showcases.

Artists perform in front of key music executives, including record labels, publishers, management, sync supervisors, promoters, agents and distributors, enabling them to make vitally important contacts to enter the international business.

The commercial returns have been impressive. Over the past 3 years, during the latest period of DIT support, the International Showcase Fund has provided grant support of over £875,000 to 364 artists, bands and songwriters. This has generated a return on investment of over £5.3 million for the music industry and the UK economy and every £1 of DIT's contribution has generated £15 in export revenues.

Alongside this commercial success, the International Showcase Fund has been successful in engaging the regions and nations of the UK, with funding partners in all the devolved administrations and around 40 per cent of funding recipients coming from BAME backgrounds.

The UK's creative industries are a vitally important part of our economy and I want to take this opportunity to thank all the funding partners for their commitment in supporting the International Showcase Fund.

Joe Frankland, CEO, PRS Foundation

Established in 2006, the International Showcase Fund responds to the needs of the UK's most talented music creators to showcase their work to industry figures and new audiences around the world.

Since March 2016, the fund's budget has doubled, benefitting hundreds more music creators and small businesses who simply could not afford to export without co-investment from ISF partners and the music industry. A staggering 98% of beneficiaries agreed they would not have been able to showcase internationally without our support.

The financial impacts for the UK economy and the music industry are clear for all to see. Especially encouraging is the impact for individual creators and their teams, with 91% reporting tangible business outcomes, including label and publishing deals and international bookings.

For those wanting to break through to a sustainable career, international development is more crucial than ever, and showcasing remains the most effective way to fast-track business and audience development. As well as supporting a 94% increase in average export revenue, the average audience size has nearly tripled and 88% of grantees reported an increase in media coverage. This is particularly relevant in 2019 now artists and labels release music in every country simultaneously.

This report also demonstrates the ISF's alignment with UK Government's focus on the influence and power of the UK creative industries overseas. The UK is a hotbed for emerging talent and the scheme provides our most exciting creators with the platform to influence international culture and solidify the UK's global prominence.

PRS Foundation is hugely grateful to partners Department for International Trade, Arts Council England, British Underground, PPL, the Musicians' Union, Creative Scotland, Wales Arts International, Arts Council of Wales, Arts Council of Northern Ireland and Invest NI.

We must ensure that current and future export challenges are addressed through a robust and flexible funding programme. Continued success relies on further investment to explore new ways to meet pipeline gaps and to increase the ISF's impact on a diverse range of music creators.

@Joe_Frankland





Ider



Ms Banks

SUMMARY OF FINDINGS

Total Revenue

- ISF investment from April 2016 to March 2019 has generated a cumulative increase of **over £5.3m for the UK economy**. This increase is 33% higher than in 2013-16.
- For **every £1 of total ISF investment**, artists **generated an additional £6.20 in revenues**.
- For **every £1 of DIT's contribution**, artists **generated £26.70 in total revenues**.
- The **average revenue** for a beneficiary artist **increased by over £14.5k (66%)** after ISF support, increasing from an average of £22.3k to £36.9k.

Export Revenue

- ISF investment from April 2016 to March 2019 has generated a cumulative increase of **over £3m for the music industry and UK economy**.
- For **every £1 of ISF investment**, artists **generated an additional £3.50 in total export revenues**, delivering an ROI of 350%.
- For **every £1 of DIT's contribution**, artists **generated £15.20 in export revenues**.
- The total **export revenue** of beneficiary artists **increased by 94%** after ISF support, from £3.2m to £6.3m.

Business Outcome Value

- **A vast majority (91%) of ISF beneficiaries** from 2016-2019 have **reported tangible business outcomes** since receiving ISF investment.
- ISF beneficiaries surveyed reported an average of **3.5 tangible business outcomes**.

Audience, Media Coverage and Digital Growth

- The **average audience size** for a beneficiary artist after **ISF nearly tripled**, increasing from 225 prior to ISF to 644.
- Grantees report **significant media and PR impact**, with artists being booked to perform on **The Late Show, The Tonight Show**, and securing coverage in the **New York Times, NPR, The Guardian** and **Billboard**.
- The **average social media footprint** for a beneficiary artist after ISF increased by over 1,900 Twitter Followers, or 73%, and 4,200 Facebook 'Likes' or 66%.

Diversity and Inclusion

ISF recipients reflect the breadth of talented music creators making music in the UK:

- **40%** of grantees are from **BAME backgrounds** (up from 23% for 2013-16).
- **43%** of grantees are **Female, Non-Binary, Trans or Mixed Gender Groups**.
- **ISF continues to reflect genre trends**, with 17% of grantees working in Black British music genres and more support for the thriving UK Jazz scene.



Sky Adams



Kelly Lee Owens



The Ninth Wave

THE IMPORTANCE OF SHOWCASING

Showcasing is an important part of career development for artists and songwriters, and for the music industry's talent development pipeline. Unlike traditional live performances and touring, showcasing is a B2B environment bringing together a concentration of industry professionals with a focus on conducting business. In this way it is vital for connecting artists with those who will take them to market. Showcasing is one of the primary means of presenting work to key international buyers, who ultimately open up new markets by connecting artists with new audiences.

In an increasingly crowded marketplace, showcasing helps cut through the tyranny of choice faced by industry professionals and audiences. It provides a curation of export-ready artists to showcase in front of a delegation of investment-ready 'buyers'.

Showcasing also commands attention from trade press and media, along with social media and influencers – all of which have an impact on an artist's career trajectory. Being selected to showcase provides a seal of approval or a kitemark of success which unlocks further support, funding and audiences in the future. The demand for showcasing is significant, with eligible events occurring in great numbers around the world.

In an increasingly digitally connected world, it is becoming ever more important for artists to travel and showcase their work in different markets. The harmonisation of music markets reflected by the introduction of the standardised Global Release Day mean that artists need to be everywhere to promote their work in increasingly tight timeframes.

Not only does showcasing present UK artists on the global stage, but it also introduces and orients UK artists in becoming acquainted with new markets and the businesses and contacts necessary to establish a market presence.

*"Receiving the funding has made all the difference in assisting me to achieve some of my most pivotal targets to date. Speaking as an independent artist, the funding from PRS Foundation is a much-needed provision to enable unsigned artists to have equal opportunities in the music industry – SXSW being the most recent for me". **Mercury Music Prize nominee, Novelist***

DEVELOPMENTS OF THE FUND

The fund's budget has more than doubled since 2016 expanding partnerships significantly, including with PPL, Creative Scotland, Wales Arts International, Arts Council of Wales, Arts Council of Northern Ireland and Invest NI, illustrating the effective collaboration of collection societies, funding bodies and industry partners coming together.

Thanks to new partnerships, **ISF is now available across the UK**, meaning those based in England, Wales, Scotland and Northern Ireland can apply. The UK-wide approach has fostered greater coordination and collaboration and realised creative and business benefits to the sector as a whole.

The fund has also expanded its remit beyond artists to include songwriters and writer-producers in a move to support those working behind the scenes. ISF is also one of the only music funds providing support for artists' managers.

ISF complements the work of PRS Foundation Talent Development Partners, such as FOCUS Wales and British Underground who support talent on the ground and forge stronger relationships with international showcase organisers.

*"I was aware that artists from Scotland were previously unable to obtain support. We are grateful this has now changed. The most important outcome was being able to showcase the live performance in front of bookers for key European festivals. I am delighted with the business we have done in the immediate aftermath of the festival. I am also certain that more international bookings will emerge... it was a huge success for us". **Be Charlotte***

*"Since partnering with Wales Arts International, ISF has supported many artists based in Wales, including Boy Azooga, Kidsmoke, Art School Girlfriend, and Seazoo. The grant support is complimented by showcasing opportunities and on-the-ground support from FOCUS Wales. FOCUS Wales exists to provide showcase opportunities to emerging artists from Wales at home and abroad, including a high-profile showcase for artists at SXSW each year. Artists performing at the Wales at SXSW showcase have received invaluable support from ISF over the last two editions of the festival, and we will continue to promote the fund to artists in future". **Sarah Jones, FOCUS Wales***

International Showcase Fund

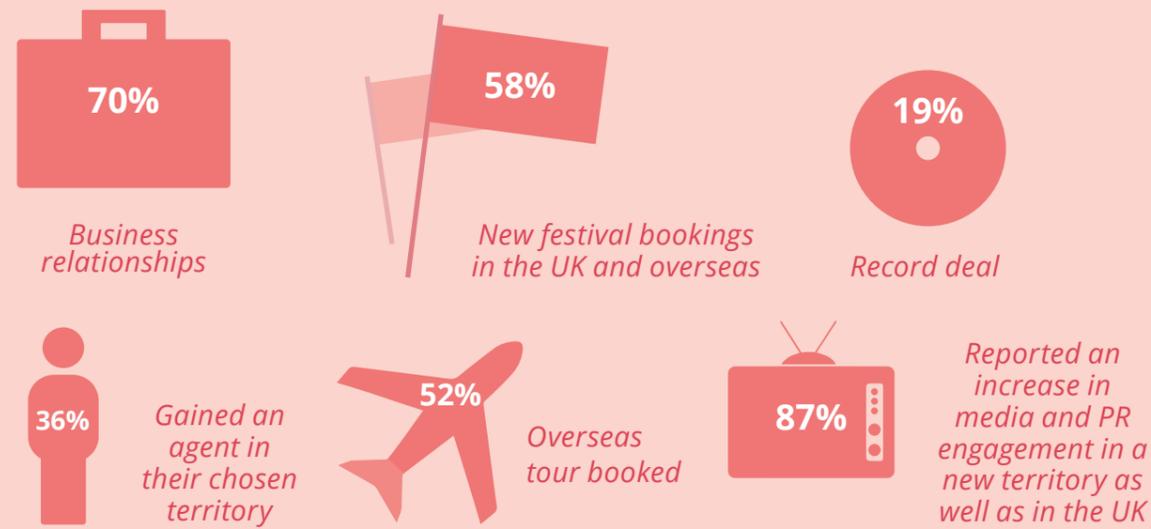
April 2016 – March 2019 Impacts



Investment

£850,000+
invested to support first-steps into international territories

91% reported clear business outcomes including:



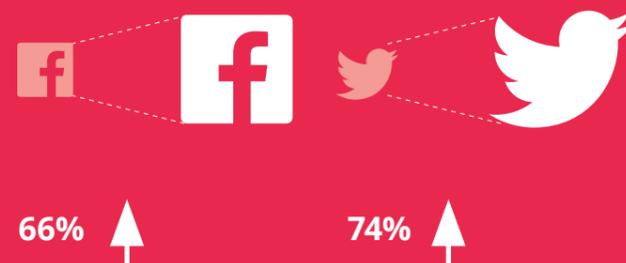
ISF beneficiaries surveyed reported an average of 3.5 tangible business outcomes

Supported artists, bands and songwriters



Social media increase

Significant social media increase.



With every £1 of total ISF investment generated an additional £6.20 in revenues, meaning £5.3m has been generated for the music industry and UK economy

For every £1 of DIT's contribution, artists were able to generate £27 in revenues

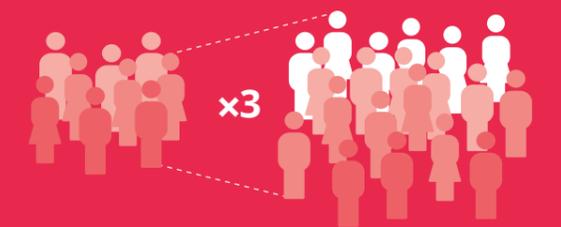
Average export revenue for a beneficiary increased up to **£17.2k**
A 94% increase in the last 12 months



For every £1 of DIT's contribution, artists were able to generate £15 in export revenues

Average live audience increase

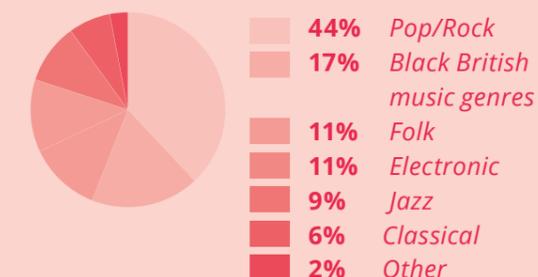
Average attendance at ISF beneficiaries' live shows has nearly tripled since their international showcase



Grantees report significant media and PR impact, with artists being booked to perform on **The Late Show**, **The Tonight Show**, and securing coverage in the **New York Times**, **NPR**, **The Guardian** and **Billboard**.

2016—2019 additional data

Genre of those supported



ISF continues to reflect genre trends, with 17% of grantees working in Black British music genres and more support for the thriving UK Jazz scene



Investments benefiting artists from **BAME backgrounds** **40%**



43% of grantees are Women, Non-Binary, Trans or Mixed Gender Groups

FINANCIAL IMPACTS

The grant support has had a considerable impact on the beneficiaries' careers, financial growth and sustainability, and had opened up new opportunities for the UK's music businesses.

UK 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, and opening new doors for UK businesses. Other significant impacts for grantees 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 increasing income from recordings including sales and streams.

ISF Investment

- From April 2016 to March 2019, the International Showcase Fund has supported **364 artists, bands and songwriters** and **invested over £857k** to support first-steps into international territories.
- The **vast majority of ISF beneficiaries would not have been able to participate in their respective international showcases without the support of ISF**. A staggering 84% of beneficiaries strongly agreed they would not have been able to showcase internationally without ISF support, while 14% somewhat agreed, and only 1% indicated they somewhat disagreed.

Total Revenue

- ISF investment from April 2016 to March 2019 has generated a cumulative increase of **over £5.3m for the UK economy**. This increase is 33% higher than in 2013-16.
- For **every £1 of total ISF investment**, artists **generated an additional £6.20 in revenues**, delivering a return on investment (ROI) of over 600%.
- For **every £1 of DIT's contribution**, artists **generated £26.70 in total revenues**. Approximately £1.50 (23%) of the £6.20 in the total additional revenues generated were supported by DIT investment.
- The **average revenue** for a beneficiary artist **increased by over £14.5k (66%)** after ISF support, increasing from an average of £22.3k to £36.9k.

Export Revenue

- ISF investment from April 2016 to March 2019 has generated a cumulative increase of **over £3m for the music industry and UK economy**.
- For **every £1 of ISF investment**, artists **generated an additional £3.50 in total export revenues**, delivering an ROI of 350%.
- For **every £1 of DIT's contribution**, artists **generated £15.2 in export revenues**. Approximately £0.80 of the £3.50 in additional total export revenues generated were supported by DIT investment. ¹
- The total **export revenue** of beneficiary artists **increased by 94%** after ISF support, from £3.2m to £6.3m.

ISF helped increase artist exports and income from international markets

- Nearly half of ISF beneficiaries strongly agreed that ISF helped increase export income from international markets (44%), while 35% somewhat agreed, and 12% somewhat disagreed.

Business Outcome Value

- A **vast majority of ISF beneficiaries** from April 2016 to March 2019 have **reported business outcomes** since receiving ISF support (**91%**). This has increased from 89% in 2013-2016.
- The business outcomes following ISF support have included **New business relationships** (70% of beneficiaries), **New festival bookings** (58%) and **New overseas tour dates booked** (52%). These were followed by generating **Significant media and PR** (43%), **Gaining a booking agent in the territory** (36%), **Signing a record deal** (19%), **Signing a sync deal and Signing a publishing deal** (13% each). Nearly half of ISF beneficiaries reported **other business outcomes** such as building a fanbase and gaining media attention.
- The average ISF beneficiary reported generating **3.5 tangible business outcomes as a result of ISF**.

Without ISF support, we would not have signed our worldwide exclusive publishing agreement, with Mothership Publishing, who were in attendance to see the band play at SXSW 2018. Catholic Action



Let's Eat Grandma by Francesca Allen

AUDIENCE AND ARTISTIC IMPACTS

Audience, Media Coverage and Digital Growth

- The **average audience size** for a beneficiary artist **nearly tripled** after ISF support, increasing from 225 to 644.
- ISF beneficiaries report **significant media and PR impact**, with artists being booked to perform on **The Late Show, The Tonight Show**, and securing coverage in the **New York Times, NPR, The Guardian** and **Billboard**.
- The **vast majority** of ISF beneficiaries **reported increases in their media coverage** since receiving ISF support. Nearly half of ISF beneficiaries reported significant increases in media coverage (49%), 43% reported small media increases, and 9% reported no increase in their media coverage after receiving ISF support.
- **Online media coverage increased the most**, with 88% of beneficiaries reporting small to significant increases, followed by increases in radio coverage reported by 74% of beneficiaries, print media coverage reported by 67% of beneficiaries, and TV coverage reported by 27% of beneficiaries.

*Having a great PR presence and the support of NPR, The Guardian, American Songwriter, The Times and Bluegrass Situation amongst many other publications has massively changed my profile and I haven't even got to utilizing all of the contacts I've made there are so many...Big thanks to Crispin Parry and the team at British Underground for hooking this whole thing up and supporting me so much on my trips to the US **Yola***

Social Media Footprint

- The **total social media footprint** for beneficiary artists has grown with the number of **Twitter Followers increasing by 74%** and **Facebook 'Likes' increasing by 66%** after ISF.
- Nearly **90% of ISF beneficiaries saw an increase in their online streaming** following after receiving ISF support.



Keir

Artistic Outcomes

The ISF played an important role in shaping artists' creative development and furthering their careers by exposing them to both new markets and new business opportunities. In most cases these opportunities were only available because of the ISF grant – over 84% of respondents strongly agreed that the artist would not have been able to participate in the event without ISF support.

The ISF also helped benefit the wider sector by raising the profile of UK music overseas and reinvigorating the sector more generally through the introduction of new approaches, skills and sounds. By helping to expose emerging artists to musicians from other countries, and providing the opportunity to collaborate with them, the artistic and career impacts have been significant.

*AJ was able to link up with an American based producer who was in town for the Conference and to go to the studio with him. This track has ended up being on the debut album. **Andy Musgrave, Manager, AJ Tracey***

- A majority (54%) of **ISF beneficiaries strongly agreed that ISF helped increase the artist's international profile or media coverage**, while 36% somewhat agreed, and 3% somewhat disagreed.

*I was able to gain new, loyal supporters and come across great industry links who will help me on my journey. Performing in North America gave me wider perspective on working a different audience and boosted my confidence for future shows. **Ms Banks***

- **Nearly three-quarters of ISF beneficiaries reported ISF as helping to develop their creative skills.**
- **97% of ISF beneficiaries cite the importance of ISF as helping to add credibility to their career.**
- **92% felt that support empowered them to have more creative freedom in their work and reduced the pressure to sign deals prematurely.**

*The experience of performing abroad has made me a much more confident performer. It was also a great opportunity to meet other musicians present at Tallinn Music Week and talk about potential collaborations. **Emilie Levienaise Farrouch***

- 94% of beneficiaries agreed that **ISF helped artists develop their business skills.**
- ISF has helped to advance their careers. 70% strongly agreed and 25% somewhat agreed that their **ISF has helped to develop their careers.**

*Suzi Wu was signed to Def Jam on the back of her SXSW... her coming out to do showcases cemented the deal, and with it, major investment for the US market. Suzi has already been back to perform a headline run of shows and has started to gain significant press and media attention there. **Joss Acock, Manager, Suzi Wu***

- **ISF supports artists in developing sustainable livelihoods in music and helps beneficiaries to become full time artists:**

Over one-third of ISF beneficiaries reported increases in the sustainability of their music livelihood after receiving ISF support. There was a 15% increase in beneficiaries who were fully able to sustain their livelihood from music, from 26% prior to ISF support to 39% after.

- **ISF supports artists in growing their team size.**

Over half of ISF beneficiaries reported growing their team of managers, agents, labels and publishers after receiving ISF support. Many artists attributed the increase in their team size to ISF for the connections and introductions made at the showcases and in different markets.

*Getting the International Showcase Funding as support to bring my band to SXSW in 2019 really helped to progress my career to the next step as I started working with an American booking agent [Paradigm] as a result of the visit. This has set me on the path to internationalising my career. **Joshua Burnside***



Anna Meredith by Kate Bones



Kakoroko by Adama Jalloh

CULTURAL DIPLOMACY, SOFT POWER AND RETURN ON INFLUENCE

International music showcasing is a unique and effective contributor to the UK's wider 'brand' and its cultural influence globally. ISF's support in helping UK artists break into new international territories helps showcase some of the best of UK culture to global tastemakers, buyers and decision-makers. Showcasing artists also espouse UK values, provide an inimitable launchpad for UK business, while fostering cross-cultural diplomacy, global influence and understanding – solidifying the UK's prominence on the global map.

ISF supports a wider UK agenda and contributes to improved trade and diplomatic relationships through the soft power agenda.

The UK is notable for its success in promoting itself through soft power and leveraging resulting opportunities has been significant, ranking as the top country in Portland Communications Soft Power 30 in 2018 ². Ensuring that multiple avenues are exploited and stakeholders are engaged in profiling and highlighting UK music and artists is essential, and ISF ensures that high profile music festivals and industry showcasing events around the world are used as vehicles for the UK's soft power agenda.

This contribution of ISF is only poised to become more important and significant as the UK prepares to leave the European Union. Indeed, the Portland report noted that the UK's 'robust soft power performance' was surprising, and in this context, the importance of sustaining the country's presence and bolstering its attractiveness cannot be overstated. Many ISF recipients showcase in Europe and therefore directly contribute to the UK's aim to develop and sustain positive relationships with European countries through the arts.

The arts play an important role in using soft power to support the UK's wider economic growth, with programmes like ISF **supporting the UK's soft power strategy alongside wider economic growth by showcasing its artistic output combined with business and export campaigns such as the GREAT Campaign.**

ISF is a formidable partner in international trade and investment initiatives, ensuring that export income increases and that foreign partners are encouraged to invest in the UK music industry. According to UK Music, the UK's music industry is worth £4.5 billion, and exports increased by 7% in 2017 to 2.6 billion ³. ISF plays a central role in ensuring that this growth and prosperity continues by developing a pipeline of artists with experience performing overseas and with contacts to support them and increase their export income.

Through ISF, the UK music scene is also able to influence international culture and music industries around the world. ISF magnifies the UK's creative and innovative output, **helping partners leverage the UK's cultural assets**, and exposing artists to new audiences and to artists to collaborate with and influence.

ISF gives artists the opportunity to increase their own awareness of trends and developments in the global music sector, allowing the UK music industry to continue to appeal to international audiences and push boundaries. ISF has helped bring UK grime music to the US and has played a significant role in supporting London's innovative jazz scene on the global stage through individual grants and partnerships with innovative organisations such as British Underground and Jazz re:refreshed. ISF has highlighted the diversity and innovation of the UK's creative output. The increased demand for UK Jazz musicians internationally has a clear economic impact and supports the soft power agenda of the country.

ISF supports the UN Sustainable Development Goals, notably SDGs 5: Gender Equality by focusing on engaging more women, non-binary and trans artists through ISF; and SDG 8: Decent Work & Economic Growth through providing career development support, international exposure and experience and networking opportunities to expand the sustainability of music as a livelihood. And opening new markets for music artists and businesses.

*London's vibrant jazz scene is ready for its crossover moment, and saxophonist Nubya Garcia is one of its most compelling stars, tearing through compositions that draw inspiration from Afrofuturism, grime, hip-hop and other genres that hovered around her club-kid youth. **Mayra Johnston, The Rolling Stone (12 March 2018)***

*We are very grateful to the International Showcase Fund for supporting our international endeavours as a band, without them we would not have been able to open ourselves to the opportunities we have been given...We consolidated offers for some major European festivals including Roskilde, Lowlands and Oya. It also allowed the band the opportunity to meet international teams interested in working with them early on. **Black Midi***

DEMAND, DIVERSITY AND REACH

Industry barriers and market factors indicate a continued need for ISF

- ISF beneficiaries reported a combination of market factors that were significant barriers to their music careers, including increasing costs of performing at showcases alongside decreased financial support for touring and export.
- Beneficiaries overwhelmingly report ISF as supporting their career and helping to address these market challenges by filling a funding gap in private and public support. This was reported as the most significant market factor.
- ISF's impact is also felt domestically, with increased audience and industry attention in the UK as a result of high-profile international attention (e.g BBC Music coverage at SXSW).
- Beneficiaries also reported the importance of ISF in adding credibility to one's career as a form of 'seal of approval' that helps open other opportunities. This was reported as the second most significant market factor.
- Beneficiaries also reported ISF as helping to alleviate the pressure to sign deals prematurely and afford artists more creative freedom. This was reported as the third most significant market factor.
- Beneficiaries reported the costs of performing at showcases (including travel and registration costs) as having increased. The increasing costs and administrative requirements for obtaining artist travel visas were deemed prohibitive, and many artists cited not only the financial support of ISF as being critical but also the administrative support in securing their visas. In many cases, the artists were able to re-use their visas acquired through ISF for subsequent trips for up to a year, many of which would not have been possible otherwise. Beneficiaries also cited the uncertainty around travel within Europe resulting from Brexit as a concern and would turn to ISF for support in this area. In addition, the grant limit per showcase may be a constraining factor for beneficiaries.
- Meanwhile, beneficiaries reported decreases in the traditional financial support available for touring and export, such as tour support coming from labels.

97% of ISF beneficiaries report the fund filling a funding gap left between private and public investments.

ISF is in increasingly high demand from the sector

- **Demand for ISF has increased 150%** from a total of 336 applications between April 2013 to March 2016 to 838 between April 2016 to March 2019.
- The demand for ISF support in applications exceeded the supply of funding by £2,140,002.
- **43% of applicants received support** (compared to 30% from April 2013 to March 2016).
- The significant increase in demand for ISF correlates with the value beneficiaries place upon it for its role in filling the gap between public and private financing, and in the context of increasing financial pressures and market factors cited by beneficiaries including the increasing costs of international showcasing and exports alongside decreasing levels of support.

A Diversity of Beneficiaries

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 women and BAME representation across Scotland, England, Wales and Northern Ireland. ISF has worked closely with a diverse range of advisors, ambassadors and partners to achieve this, enhancing awareness, suitability and access to the fund.

- From April 2016 to March 2019, **40% of ISF beneficiaries were BAME** (Black, Asian and minority ethnic), an increase of 39% from 2013-16.
- 43% of grantees were **Female, Non-Binary, Trans or Mixed Gender Groups** and accounted for 44% of the financial value of the grants awarded.
- ISF continues to reflect genre trends, with **17% of grantees working in Black British music genres**, 11% in electronic and 9% each for the thriving UK Jazz scene and folk music.
- **5% of ISF beneficiaries reported having a disability.**
- From April 2016 to March 2019, **49% of supported artists resided outside of London at the time of ISF support.** Within England, 38% of supported artists resided outside of London.
- **ISF applicants from Wales had the highest rate of success, with 76% of applications being granted**, followed by applicants from **Scotland (61%) and Northern Ireland (54%).**
- **67% of ISF beneficiaries showcased in North America**, followed by **28% in Europe**, and **6% in the rest of the world.**

Awareness of Financial Support and Funding Progression Routes

ISF is a cornerstone for talent and business development progression routes and a crucial stepping stone in the music sector support ecosystem. Many ISF supported artists have previously received PRS Foundation support at early career stages, and there is a strong relationship between ISF and flagship talent development programme Momentum Music Fund, which invests in the UK activity of artists at crucial career tipping points. As of July 2019, **63 Momentum grantees have progressed into ISF support.**

ISF's key role in supporting first-steps into new territories through showcasing presents a natural progression route between ISF and the BPI's **Music Export Growth Scheme (MEGS)**, which was launched in late 2013 with DIT funding to support non-showcase related international projects. And as of July 2019, **50 of the 189 artists supported through MEGS had been funded through ISF.**⁴

PRS Foundation Open Funding had reasonable awareness as a complementary fund, with only 16% of ISF beneficiaries having not heard of it.

Help Musicians UK schemes were the second most commonly accessed complementary funds after Momentum.

PARTNERSHIP WORKING AND RECENT DEVELOPMENTS

- ISF's **best practice model** combines Government funding, public investment and co-investment from the music industry to generate significant returns. **Every £1 invested by DIT is matched by £4.29 of investment from other ISF partners.**
- ISF was **originally launched in 2006 with Government, Arts Council England and PRS Foundation support**, and has grown substantially, with contributions from **10 funding partners.**
- **ISF is now available across the UK**, meaning those based in Northern Ireland, Wales, Scotland and England invited to any international showcasing event can apply.
- **ISF now funds one-off international camps for songwriters and writer-producers**, resulting in dozens of international releases and deals including Danny Shah signing to Universal Music Publishing Group following support at SXSW Songs.

Artists supported within this period include:

Sam Fender, Jade Bird, Yola, Ezra Collective, AJ Tracey, Black Midi, Nadine Shah, Be Charlotte, Boy Azooga, Dave, Freya Ridings, IDLES, Novelist, Fatherson, Ms Banks, Shame, Moses Boyd, Suzi Wu and Nubya Garcia





Kobi Onyame

WHAT'S NEXT FOR ISF?

ISF has had a significant impact on the UK's music industry, the development of UK artists, the generating of international exports and contribution to the UK's soft power and influence globally.

With further investment, ISF would be able to meet more of the growing demand from the sector in supporting more artists and industry professionals with their international showcasing. ISF could also help to counter the growing costs of international showcasing, along with the crucial associated costs not currently eligible for support. ISF may also need to further increase the financial limit per grant to reflect the increasing costs of showcasing.

Building on ISF's active work for increasing the diversity and geography of grantees, with further investment the fund could increase its impact by working closely with partners to support more diverse artists from different socio-economic backgrounds and outside London. Moreover, ISF could increase its support for showcasing at markets outside of North America and Europe, looking to diverse and emerging markets across Asia, Africa and South America. This may mean adapting eligibility for events not adopting traditional showcase models.

Given trends of more artists showcasing and touring to reach the global music market and the retrenchment of support for artist travel at the early stage of their career, more investment in ISF could help increase the fund's impact by addressing these issues. There remains a gap for funding international touring at a pre-MEGS level, and more can be done to signpost international progression routes.

In addition to funding, further ISF investment could help provide increased non-financial business support and services for artists to help them make the most of their investment, offering more care and support on the ground. With the lack of a music export office, UK artists are at a disadvantage from their contemporaries in Scandinavia, Europe, Australia and North America.

ISF has built a solid track record for supporting internationally recognised names and as such, ISF partners could explore forging innovative brand and commercial partnerships.

CASE STUDIES

Jade Bird is an emerging English singer-songwriter and musician. With the support of ISF, in 2018 Jade travelled to SXSW to promote her new single and generate timely momentum behind her mounting album campaign.

This opportunity opened many doors for Jade, helping to follow-up on US audience interest in her work in a timely fashion by playing 14 performances, including showcases for BBC Radio 2, BMI, Pandora and Vevo.

It also allowed her to hold over 20 crucial face-to-face meetings to establish new contacts and develop deeper business relationships with key industry members and key parts of her US-based and international team including her label, Glassnote. Jade had meetings with Kobalt, who soon signed a publishing deal with her, and brands such as Bose who subsequently signed branding deals.

At the festival, Jade won the coveted SXSW Grulker Prize, putting the spotlight on her career as one of the most promising new artists internationally.

The opportunity also provided Jade a platform to generate significant media and press coverage across the US, such as performing on The Late Night Show with Stephen Colbert, as well as UK and international coverage.

The showcase helped connect Jade with creative forces that would have a major impact on her career, including meetings that led to her touring around the US as a support for major acts Hozier and First Aid Kit, and a joint tour with Brent Cobb.

Making the most of her time in the US, Jade travelled to Woodstock, New York to collaborate and record material with producer Simone Felice for her debut album which reached No.1 on the US Heatseekers Chart, and No.14 on the US Folk Chart. Three of the singles from the album charted in the US AAA Chart, revealing extensive radio support across the US.



Jade Bird

Creative Outcomes

- Won the SXSW Grulker Prize for best new international artist
- Produced and recorded new material for her debut album in Woodstock, NY, with acclaimed producer Simone Felice
- Developed relationships with producer Dave Cobb and acclaimed artists First Aid Kit, Hozier and Brent Cobb with whom she co-wrote a song
- Performed 14 shows to key industry figures
- Met the band Flight, with whom she brought to support her subsequent US tour

Business Outcomes

- Signed publishing deal with Kobalt
- Conducted 20 business meetings with key industry players
- Bolstered her US audience base to a level where she could launch her own US tour
- Signed branding deal with Bose
- Advanced her relationship with US-based label Glassnote
- Developed business relationships with brands BBC, Pandora, Vevo and BMI who subsequently supported another US tour with First Aid Kit, Anderson East and Colter Wall

Originally from the South-West of England, John Smith is a guitarist and songwriter. In addition to releasing five records of his own, he has played guitar for artists such as David Gray and Joan Baez, and supported acclaimed musicians including John Martyn, Davy Graham and John Renbourn, who called him 'the future of folk music'.

With the support of ISF, John was able to attend the AmericanaFest in Nashville in 2018. Through this, he was able to consolidate his relationship with his new team in the USA, meeting his representatives face-to-face for the first time. This enabled the team to develop an impactful strategy for the launch of his album in the US and corresponding promotional tour.

John was able to truly embrace the opportunities offered by the showcase, performing four times over the course of the weekend. Leveraging his official showcase slot, he obtained the opportunity to perform at the British Underground Showcase, and performances for AMA UK and the Thirty Eagles Brunch.

Through American musician Rodney Crowell, he met session bass player Michael Rooney. This connection in particular means that further work in Nashville and the United States is now more feasible – he now has a reliable band with whom he can perform, and vital industry connections he can draw on. Throughout his time in the US, John experienced the importance of acting as a representative for the UK music sector.

John has since launched and toured his album domestically, and as a result of his ISF showcase at Americana, returned to the US to tour with musician Patty Griffin.



John Smith

Creative Outcomes

- Collaborated with new musicians
- Explored the genre of music that interests him in greater depth
- Because of the ISF grant he was able to focus on his music and creativity

Business Outcomes

- Further developed relationships with US and UK representatives
- Shaped clear strategy for album release in the US
- Confirmed his collaboration with British Underground, with whom he had previously worked
- Networked with figures in the industry in the US and was taken seriously because of the ISF grant. Some of the opportunities he now has are a direct result of Americana
- Subsequent tour of the US with Patty Griffin
- Experience applying for the grant was useful and prompted further applications. He has since been awarded Momentum funding

"Funds like this are crucial in giving developing artists a platform where they can perform their music to new audiences all over the world."

"The support enabled me to travel to SXSW Festival in March 2018. I ended up performing 14 shows in 4 days and was awarded the Grulker Prize for Developing Non-US Act at SXSW and had one of the best experiences of my career so far." Jade Bird

"Attending the festival without grant support] would have meant that everything else I was trying to do after, like bankrolling a tour, which I do independently, would have probably been very close to impossible. The fact that ISF paid for my flights and my accommodation and for my ground transport just meant that I could do it, and be out there, without lying awake at night thinking about how I am actually making this work. Instead I was able to relax, and really enjoy the opportunity that was afforded to me." John Smith

Charlotte Haining is a singer, songwriter and top-line vocalist originally from Leeds and now based in London. She graduated from The Liverpool Institute for Performing Arts with a First Class Honours degree in Music in 2013 and has worked mainly with EDM musicians as a vocalist.

With ISF support, Charlotte was able to attend ADE in Amsterdam for her first ever writing camp in 2017. The ADE writing camp was sponsored by Sony ATV and PRS for Music. At the writing camp, in pairs, participants wrote two songs per day in preparation for a listening and feedback session in the evening.

In addition to developing and maintaining the network of other writers attending ADE, Charlotte met several new collaborators including Kelly-Leigh and Katya Edwards with whom she has now co-written new songs.

As a direct result of her participation at ADE, Charlotte has several deals in the pipeline.

As a result of ISF support, Charlotte's experience at ADE allowed her to consider new sounds and to innovate in her writing, rather than explicitly focusing on what would appeal to UK radio. This has meant her writing and musical career is more resilient, likely to thrive internationally, and well placed to innovate and have an impact on the UK music scene.

As an artist at the start of her career, the ISF support was pivotal for Charlotte in thinking and working internationally and has prompted her to attend other writing camps. In addition, the ISF support was an important kitemark of success for Charlotte in advancing her career, and lent confidence to an artist in the EDM genre that is often quite separate from the mainstream music sector.

"I think it's really important because for me, personally, I'm not from a super-rich family. I don't have a publishing deal, I don't have a record deal, anything like that at this stage, I'm completely independent. So without the funding, and without the help from PRS Foundation, I wouldn't have been able to go to ADE and have that experience, because living in London is very expensive. So it's been amazing."

Charlotte Haining



Charlotte Haining

Creative Outcomes

- Focused on a specific genre, gaining further experience in a high-pressured environment
- Wrote two songs a day in collaboration with songwriters published by Sony ATV and obtained vital critical feedback to help advance her craft
- First experience writing outside the UK, and of the value of changing contexts to change creative outputs. She has since attended other writing camps and sought to work more globally
- Has since collaborated with Kelly-Leigh and Katya Edwards
- Felt a confidence boost- the grant showed that others believed in her

Business Outcomes

- Has since received money from PRS Foundation's Writer Producer Fund
- Making industry connections and strong networking opportunities with international musicians
- Some deals in the pipeline directly linked to her participation in ADE
- Developed an awareness of how to write music for markets outside of the UK
- Gained further experience writing grant applications – collaborated with her manager to write the grant for ADE



Nubya Garcia

Nubya is a saxophonist and composer. She creates innovative Jazz music, and collaborates regularly with fellow musicians around the world, such as Makaya McCraven. She is also a founder of Domino-signed septet NÉRIJA and plays in groups Maisha and the Theon Cross Trio.

With ISF support, Nubya was able to showcase as part of Jazz re:freshed and British Underground's Outernational showcase at SXSW 2018. For Nubya, this experience was part of a larger, coordinated attempt to crack the US market. She took advantage of her time in the United States to also perform a second Outernational concert in New Orleans, and to take meetings with potential managers and A&R teams. She also credits the experience with giving her the opportunity to gain exposure and meet bands and musicians from around the world.

In 2018, Nubya released her second EP, 'When We Are', and the title track was named one of NPR's Best Songs of 2018. She won the Jazz FM Breakthrough Act of the Year Award 2018, the Sky Arts Breakthrough Act of the Year Award 2018, and the Jazz FM UK Jazz Act of the Year Award in 2019.

In the past few years, she has performed four separate concerts in the US, 3 of which have been funded by PRS Foundation. The long-term market development supported by ISF has led her to lead a follow-on tour to the US and Canada funded solely by ticket sales.

"The ISF has provided me with an invaluable opportunity to grow my profile both in the UK and internationally. I received an invitation to play North Sea Jazz Festival...I'm about to go on tour for 10 days in the states and Canada, and I don't think that would have happened [without ISF support]. I've done 4 show separately now in the States in the last two years, 3 of which have been funded by PRS Foundation. And this is unfunded now, so people are paying to come and see us."

Nubya Garcia

Creative Outcomes

- Exposure to wide range of artists and music from around the world
- Opportunity to play additional shows, and to very different audiences
- Developed relationships with artists she is likely to collaborate with
- Performed to new and existing audiences in the USA for the second time

Business Outcomes

- Gave her experience in financing her tours – she later received Momentum funding and headlined a US and Canada tour without public funding support
- Met with 2 potential managers
- Met with 3 A&R representatives and is in discussions for potential deals
- Secured European festival offers

Boy Azooga is a Welsh band of four, led by Davey Newington based in Cardiff.

With the support of ISF, the band was able to showcase at Eurosonic in January 2019 and SXSW in March 2019.

At Eurosonic in Groningen, the band attended the showcase for one day, with their manager and agent staying on to hold more meetings including with their US booking agent. While there, the band conducted interviews with media and a live radio appearance on 3voor12 Radio in the Netherlands. The band had the second most registrations on the Eurosonic app that year, were featured on Spotify playlists in the Netherlands and saw a spike in their social media following. This experience helped set up success at SXSW two months later.

At SXSW in Austin, the band performed 7 shows including a showcase at the esteemed band White Denim's Radio Milk Studios. Through meeting White Denim on this trip, Boy Azooga collaborated on recordings together and subsequently planned a UK tour together for summer 2019.

The ISF supported transportation for the band and their equipment as well as crucial visa support for entering the US and afforded some support for the manager to join the band for meetings. The band played multiple showcases as a result and performed live on air for KEXP Radio and were booked to perform at Secret Sounds in Australia which has led to an Australian tour in Autumn 2019.

These two showcasing events opened up new opportunities for the band to meet international music industry players, develop new audiences, increase their export potential, develop their creative practice and performance skills, and gain the confidence to take the next steps in their career.

With a new album around the corner, ISF support has helped the band to develop their album and merch sales potential and develop the profile and skills to be able to perform live in front of larger audiences internationally.

"Without ISF the band would not have been able to go to Eurosonic or SXSW and go on to the other territories as a result of playing there. ISF has helped the band go to places we didn't think would be possible." Daniel McEvoy, Band Manager



Boy Azooga

Creative Outcomes

- Performed with international artists in front of live audiences and on international radio
- Developed relationships with White Denim which resulted in collaborative new recordings and a subsequent UK tour together
- Subsequently performed as opening act for Neil Young on a European tour in 2019, which helped them develop to perform for significantly larger audiences
- Worked with the company Secret Sounds at SXSW which led to an Australian tour in Autumn 2019
- Generated increases in media coverage and social media followers in the US and Europe

Business Outcomes

- Subsequently obtained major bookings at Iceland Airwaves 2019 (Reykjavik), Practice Festival (Belgium), EBK Festival (Bilbao), Tromso Festival (Norway), Noorderzom Festival (Groningen), Rockingsign Festival (Paris) and Glastonbury (UK)
- Increased their income nearly tenfold since receiving support, and more than doubled their export income
- Fully able to sustain their livelihood from music after ISF support
- Increased the size of the band's team
- Nearly doubled the size of venues in which they perform
- Made international radio appearances and had songs featured on Spotify playlists



Freya Ridings

Freya received ISF support to showcase at Eurosonic in 2017, Her management team identified the opportunity as something that was uniquely suited to her as she prepared to launch her new album. Being industry-oriented, the showcase enabled Freya to play to over 100 key music industry contacts comprising promoters and radio programmers, indie and major labels including representatives from Universal.

Freya was nominated for the European Music Awards at Eurosonic as a result of her playing at the Showcase and one-year later, Freya signed a European partnership deal with Universal.

Leveraging her time at the showcase, Freya worked hard on promotion and held meetings with key radio programmers and promoters. Several of the relationships developed at Eurosonic have resulted in programmers and tastemakers actively promoting Freya's music overseas.

The showcase opportunity was crucial in boosting Freya's career by connecting her with key industry representatives all in the same place at the same time. Since the event, her single, 'Lost Without You' was certified Platinum in February 2019, achieving 600,000 chart sales in the UK.

"ISF gave us early access to the European and Scandinavian markets which have become an important part of the artists' business. It allowed us to mix with an international industry audience which helped open doors for future, licensing, sync and live opportunities...we were able to introduce her to all sorts of people because everyone is in the same place at the same time." Ollie Cartwright, Good Soldier Songs

Creative Outcomes

- Opportunity to meet other artists
- Delivered a very strong performance
- Performed for an audience of over 300, including roughly 100 key industry contacts

Business Outcomes

- Universal representatives saw the performance and later signed a partnership agreement
- Promoters they met there now represent Freya
- Broke into the Dutch music sector –she met a radio programmer who has since pushed her music



This Is The Kit

Bristol based Kate Stables, aka This is the Kit is accompanied in her performances by Rozi Plain, Neil Smith and Jamie Whitby-Coles, amongst others. Her evocative music focuses on the universality of more personal narratives and has earned the adoration of peers including Guy Garvey, The National and Sharon van Etten.

Supported through PRS Foundation's Momentum Fund to develop and record her Rough Trade released and Ivor Novello-nominated album 'Moonshine Freeze', ISF support enabled the band to showcase at Reeperbahn 2017 in Hamburg. The opportunity came at the right time to gain international exposure, and to attract a large number of international promoters went on to book the group at festivals around Europe.

Following the exposure at Reeperbahn Festival, This is the Kit performed at a festival in Paris and then European and US tours. The following summer, the band performed at several EU festivals.

With several albums under her belt, including LPs released through Rough Trade and Third Man Records, This is the Kit has gone on to release an album of remixes on Rough Trade, and a further album on Third Man Records. She is a key contributor to international collective PEOPLE's output, guesting on The National/Bon Iver side-project Big Red Machine's album in 2018 and featuring heavily on The National's critically acclaimed new album 'I Am Easy to Find'.

Creative Outcomes

- Performed for an international and influential crowd
- Gained international exposure at the right time
- Has gone on to tour and collaborate in Europe several times
- The trip helped her to secure playlists including France's Inter

Business Outcomes

- International income increased significantly in the 12 months following the showcase
- Following Reeperbahn Festival, the band were able to carry out a 16-date European tour
- They travelled with their tour manager, label representative and booking agent. Those meetings led to further opportunities
- The subsequent summer they performed at several EU festivals. Reeperbahn definitely helped to build awareness of the group
- Later received funding from the BPI/DIT's Music Export Growth Scheme to tour abroad

"The performance was designed to promote This is the Kit's first album for Rough Trade. It was the right time for her to get international exposure. In the subsequent summer she did loads of EU festivals, and Reeperbahn definitely helped to build that awareness. It was a really good opportunity." **Ollie Jacob, Manager**

Moses Boyd is a rising jazz musician based in South London. Starting his musical training at age 13, his sound emerged over time as a mix of all genres from Afrobeat and Reggae to Jazz. By the age of 18 he became a full-time musician who has evolved into producing and performing his own music entirely over the years.

After performing at SXSW 2017, Moses performed at the 2018 SXSW Jazz re:refreshed and British Underground Outernational Showcase, which would not have been possible without the help of the ISF. Attending SXSW for a second year allowed Moses to strengthen and progress his business activities by providing him a forum to set up meetings with industry professionals, including record labels, sponsors, and media organizations, from whom he received interest in 2017.

Moses met with manufacturer Evan Drumheads who put him in touch with Yamaha Drums. Since then, he has secured endorsement deals with both companies which has helped him boost his international profile. They also supply him with musical equipment during performances.

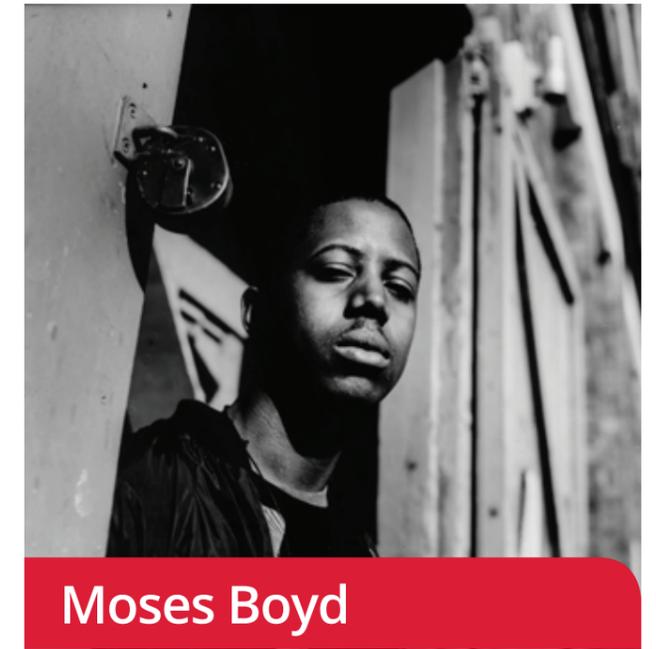
Moses' public profile grew particularly strong in America through his showcase appearances. He met with US-based jazz record company Impulse! Records in 2018 and his performances led to major international and national media coverage including a radio documentary on NPR and the New York Times.

SXSW invited Moses to perform at two separate events following his 2018 performance; one of which involved opening for the former Head of Def Jam records and current Global Head of Music at YouTube, Lyor Cohen's packed Keynote interview.

Moses went on to play at Afropunk New York a few months after SXSW and ended up scheduling a few more performances due to the relationships he built during his showcase. He credits the ISF for enabling the convergence of the London Jazz scene at SXSW, which allowed them to send a statement and solidify the validity of the new jazz sound movement as it happened.

"[SXSW] sent a statement and a message. We're championing something. It helped solidify a time and a moment that's happening and presented in a genuine honest way. From fans to labels and press all in one place. It's like Studio 54 back in the day. Transporting everyone in so everyone can enjoy."

Moses Boyd



Moses Boyd

Creative Outcomes

- Was a part of the Outernational convergence of the London jazz scene at SXSW 2018, performing alongside Zara McFarlane, Ashley Henry and GoGo Penguin
- Was invited by SXSW to open for a Keynote interview with Lyor Cohen, the Global Head of Music at YouTube
- Met with international and UK-based bands that he keeps in touch with
- Performed at Afropunk New York a few months after SXSW where he was able to refresh the artistic connections he made

Business Outcomes

- Improved his profile in America by meeting with US-based record labels, sponsors, and media personnel who featured him in press materials, including a feature in NPR and coverage in the New York Times
- Gained more PR due to his association with the UK jazz explosion around the time of SXSW 2018
- Met with major US-based jazz record companies
- Signed endorsement deals with Evan Drum Heads and Yamaha Drums, which supply him with musical equipment during international tours and strengthen his image on social media

Fatherson is a Scottish Indie band - a group of childhood friends from Kilmarnock. After growing their audiences in the UK and Scotland, Fatherson expanded their business team internationally, hoping their audiences would expand with them. They have been represented by Sony Music in the past and currently have a publishing deal with US-based Reservoir Media.

Funding to attend SXSW 2019 provided an opportunity for Fatherson to bolster their international market presence. They invited music supervisors, festival bookers and live promoters to showcases, which bettered their chances of negotiating future international licensing and touring opportunities. The band and their team conducted at least 100 meetings with key industry personnel over the festival week.

The ISF's support resurged their label's focus on the group, unlocking further investment in their North American PR and marketing efforts. They added a Radio Plugger, Planetary, to their team and embarked on a college radio campaign which ranked 110 on US college radio charts and amassed 250 spins across the campaign.

Fatherson established relationships with other like-minded bands at SXSW, including Nova Amor from Wales with whom they have plans to co-write with.

Alongside the funded trip to Austin, Fatherson played 3 performances at New York's The New Colossus Festival which would not have been possible for them without the support of the ISF. Having the ability to meet face-to-face with their NY-based publishers, Reservoir Media, through these events prompted favourable discussions about their contract which resulted in them agreeing to re-sign a significant deal.

ISF provided vital support in financing Fatherson's US showcase attendances, allowing them to strengthen existing relationships with their US agent, distributor, and publisher while making new industry connections to build partnerships with. Through these initiatives, Fatherson was able to strengthen a foothold in the international indie music industry, putting them in a favourable position for future business dealings.



Fatherson

Creative Outcomes

- Were offered to play 3 shows at New York's New Colossus Festival
- Participated in live sessions with Paste Magazine and BTR Today which secured over 35K views
- Met Wales-based Nova Amor who they will now co-write with
- Met Canadian band Lost Cousins who they are planning to set up a tour with
- Undertook a press and radio campaign that solidified their entrance into the US market
- Achieved number 110 in the US college radio chart

Business Outcomes

- Advanced their relationship with their label, unlocking further investment in the band's marketing and PR initiatives, which included a college radio campaign
- Added a Radio Plugger, Planetary, to their team
- Met with bookers from Asia, North America and Australia, and announced a new European tour for the autumn)
- Conducted at least 100 meetings with key industry personnel cumulatively
- They are setting up meetings in Autumn 2019 with industry professionals in LA
- Re-signed their publishing deal with Reservoir Media
- Met with their US teams face to face to further develop their relationship

"ISF provided vital support to make it possible for the band to travel to the US - both to showcase at SXSW, and New Colossus Festival (New York). This allowed them to spend time with their US teams (agent, distributor, publisher), building relationships and meeting their respective business partners. The support also allowed the band to undertake a promo campaign including US press and radio - giving them an important foothold in the market and making it possible to return in future."

Michael Lambert, Manager

47Soul is an alternative band best known for creating their own genre of electronic dance music, Shamstep. Composed of members of the Palestinian diaspora from Jordan, the band has been based in London since 2013.

47Soul received ISF support on a few occasions which helped them fund two showcase appearances- one at WOMEX 2017 in Poland and one at GlobalFEST 2019 in New York. These showcases were extremely useful in helping the band enter international markets, particularly in Europe. The visibility the ISF provided the band with was substantially helpful in attaining international visas, attracting press around their brand, and developing industry connections which resulted in spin-off showcase appearances and performances, one of which was at SXSW 2019.

Prior to their WOMEX 2017 appearance, 47Soul had a strong social media presence, boasting 10m+ YouTube views. Despite their digital popularity, the band had a hard time securing gigs and financing performances. The ISF provided a financial runway for them to break out - funding their travel to Poland and allowing their management team to travel with them. With funding, their manager was able to stay at the showcase for a few additional days to conduct meetings on the band's behalf. This eventually resulted in the band making a SXSW presenter connection and receiving a subsequent showcase invite as well as the addition of European bookers and sub-agents to their team.

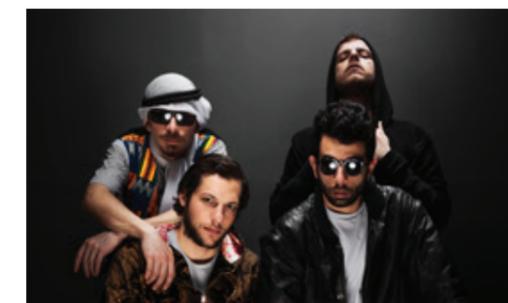
The ISF's support added credibility to 47Soul's brand, encouraging the deals they had previously been negotiating to materialize. In between their WOMEX and GlobalFEST performances, 47Soul signed with UK-based independent record label Cooking Vinyl. The band believes they can attribute the ISF as a motivating factor in encouraging Cooking Vinyl to finally close in on their deal.

Attending WOMEX provided development opportunities to the band's administration as well. In attending the various one-on-one tutorials the showcase offered, 47Soul's manager, Fadi Haddadeen, enhanced his management skills and helped advance the band's deal-making and pitching practices. As a delegate at the event, Fadi put his skills to work, building the band's network of performers and industry professionals to collaborate with in the future.

With the ISF's help in financing their showcase appearances, adding credibility to their name, and encouraging further press around their brand, 47Soul was able to strengthen their presence in the international market and further cement their relations with presenters and bookers for future opportunities. Since their 2019 showcase appearances, the band has had consistent shows booked across Europe and North America.

"It's just a domino effect. Without the ISF funding, none of this is possible"

"It's like having a credit score at a bank - once you get a good touring reputation, others will be willing to give you a chance to perform at their shows." Fadi Haddaden, 47Soul's former manager



47 Soul

Creative Outcomes

- Were set to launch a full-length album as part of the WOMEX 2017 showcase performance
- They further established their sound as an international genre, coining the term Shamstep
- Met a representative from SXSW at WOMEX which amassed in an invite to perform at SXSW 2019
- A US tour subsequently emerged out of their SXSW 2019 performance
- Translated their social media popularity into paid performances and media visibility

Business Outcomes

- Provided networking opportunities with international bookers
- Encouraged their signing with UK-based independent record label, Cooking Vinyl
- Provided a forum for 47Soul's management to develop deal-making and pitching skills
- Grew their team to include bookers and sub-agents in numerous European countries
- Now have a full-time management company to manage their increased number of bookings

METHODOLOGY

A combination of primary and secondary research was used, combining desk research and a document review of material from the ISF partners, and a series of interviews with ISF programme beneficiaries' partners and other key stakeholders. The research took place from April to July 2019.

Quantitative Analysis

Nordicity analysed ISF programme data for the three-year period of April 2016 to March 2017 consistent with the methodology deployed in the previous Impact Study. Nordicity and PRS Foundation administered a simplified survey to the 364 artists receiving ISF support totalling £857,532.

The population size was 364 ISF beneficiaries ('N' = 364) and the survey sample size was 166 respondents ('n' = 166), representing a response rate of 46% and a margin of error of ±5.6% with a confidence interval of 95% (19 times out of 20). The response rates increased significantly from the 2013-2016 Impact Study. 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 ISF population.

ISF beneficiaries rated their experience in using the reporting survey highly with 4.3 stars out of 5.

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, backgrounds and locations across the UK, including solo and group artists, and those with varying experience and degrees of success from showcasing and international touring.

Acknowledgements

We would like to express our sincere gratitude to all of the project partners, artists and managers who contributed to this report and without whom we could not have undertaken this study. In particular, we would like to thank Vanessa Reed, Joe Frankland, Liam McMahon and Winnifred Sandy at PRS Foundation. The report was developed by Stephen Hignell, Shruti Srinivasan and Sophie Hollows of Nordicity.

Artists supported within this period include:

47SOUL, A Class, Aisha Orazbayeva, AJ Tracey, Alex Hackett, ALGOBABEZ, Belisha Beacon, co34pt, Ali Meredith-Lacey pka Novo Amor, Alice Jemima, Allman Brown, Alpines, Amber Run, Ana Silvera, Ani Glass, Anna Meredith, Ariwo, Art School Girlfriend, Ashley Hicklin, Astroid Boys, audiobooks, Azekel, Be Charlotte, Beating Heart, BEATRICE DILLON, Beats & Pieces Big Band, Belle Chen, Bellevue Days, Benin City, Benjamin Brown, Big Zuu, Binker & Moses, Black Midi, Blair Dunlop, Blanck Mass, Blanco White, Blue Lab Beats, Boy Azooga, Breakfast Muff, Brigid O'Neill, C Cane, C.MacLeod, Cabbage, Call Me Unique, CALLUM BEATTIE, Cardboard Fox, Carla J. Easton, Catholic Action, CC Smugglers, CHAIN OF FLOWERS, Charlie Cunningham, Charlotte Bray, Charlotte Haining, Chelou, Childhood, Clare Dove, Conner Turner, Crosa Rosa, D Double E, Dan Bettridge, Dan Lyons, Danni Nicholls, Danny Shah, D'arcelle, Dave, Dave Hanson, Dean Owens, Dephlex, Dinosaur, Dizraeli, Django Bates Belovèd, Doc Daneeka, Doe, Donae'ò, Douglas Dare, Drahla, Draper, Dream Wife, Duncan Lloyd, Dylan Cartlidge, ELDA Trio, Elektric, Elephant Sessions, Eliza Shaddad, Elle Exxe, Elliot Galvin Trio, Emilia Martensson, Empirical, ENEMY, ephemerals, ESKA, Estrons, Eyez, EYRE LLEW, Ezra Collective, Fatherson, Febueder, Fenne Lily, Ferris & Sylvester, Fifi Rong, Findlay Napier, Fizzy Blood, Flamingods, Flats & Sharps, Flats and Sharps, FLIGHT BRIGADE, Flohio, Fond Of Rudy, Forest Swords, Francobollo, Free Love, Freya Ridings, Frisco (Boy Better Know), Gallops, Gaz Coombes, George Cosby, George FitzGerald (Live Band), Gez O Connell, Girl Ray, Girls Names, Goat Girl, GoGo Penguin, Gwyneth Herbert, Hakeem Baker, Hannah Sanders & Ben Savage, Hannah Scott, Happy Meals, HAUS, Helm, HMS Morris, Holly Macve, Honey Lung, Housewives, I Set The Sea On Fire, Ibiblio Sound Machine, IDER, Irini Mando, Jade Bird, Jake Morley, Jake Morrell, Jally Kebba Susso, James Gosling, Jamie Isaac, Jamie Joseph, Jammer, Jarlath Henderson, Jazz Morley, Jealous of the Birds, Jessica Curry - Composer, Joe Armon-Jones, John Law's Congregation, John Smith, Jonny Hockings, Joshua Burnside, Julian Siegel Quartet, Jyotsna Srikanth, K Trap, Kara Marni, Kate Simko & London Electronic Orchestra, Kate Thomas, Keir, Kelly Lee OWens, Kidsmoke, King Creosote, Klavikon, Kobi Onyame, Kojey Radical, Kokoroko, KY'ORION, L.A. Salami, LAPS (Ladies As Pimps), Leo Richardson Quartet, Let's Eat Grandma, Livy, Longfellow, Lostboy (Pete Rycroft), Lovestarrs, LUCIA, Lucy Rose, Luke Jackson, LXS, LYLO, M3nsa, Mabel Rogers, Malik MD7, Malojian, Mamas Gun, Mánran, Marianna & the Zappi Band, Marsicans, Maxwell Quartet, Meilyr Jones, Michael Taplin, Morecroft David, Moses Boyd - Solo X, Mowgli, MS BANKS, Mt. Wolf, Muncie Girls, Mystry, n/a, NADINE SHAH, Namiwa Jazz, Natalie McCool, Neil Cowley Trio, Nerija, Nilüfer Yanya, Nina Nesbitt, NOVA TWINS, Novelist, Nubya Garcia, Ocean Wisdom, Ola Onabulé, Onipa, Only Girl, Organised Scum, Oscar Jerome, Otzeki, Our Girl, P Montana, Paigey Cakey, Partikel, PAWS, Pete Barringer, Phoenix O'Neill, Pinact, Poté, Puma Blue, Queen Zee, Rachel K Collier, Red Telephone, Robert Vincent, ROE, Rude Kid, Ryan, ryan green, Safone, salute, Sam Fender, Sam Gellaitry, Samantha Whates, Samuel Cramer, SANS, Sarah Tandy (band), Sarathy Korwar, Scope, Scrufizzer, SEAZOO, Shabaka and the Ancestors, Shakka, Shame, She Drew The Gun, SIBA, SILVASTONE, Single By Sunday, Sir Spyro, Skerryvore, Sky Adams, SNE, Soom T, Space Afrika, Spinning Coin, Sports Team, Squid, Stealth, Stylo G, Sundara Karma, Superorganism, Suzi Wu, SWEAT, Swedish Death Candy, Talisk, Telemann, Tender, The Black Feathers, The Blinders, The Changing Room, The Fish Police, The Honey Ants, The Japanese House, The Jellyman's Daughter, The LaFontaines, The Little Kicks, The Moonlandingz, The Ninth Wave, The Pooches, The Sandinistas, The Slow Readers Club, The Snuts, The Spook School, The Trials of Cato, The Turbans, The Young'uns, Theme Park, Theo Douk, This Is The Kit, Thyla, Tim Arnold, Treetop Flyers, Trish Clowes - My Iris, Trudy and the Romance, TrueMendous, Tusks, United Vibrations, Urban Monk, Violet Youth, Warmduscher, Warren Morris, Westerman, Where Fires Are, WiDE AWAKE, William the Conqueror, Willie J Healey, WOMPS, Worry Dolls, Yellow Days, Yola Carter, Yussef Dayes, Yxng Bane, ZARA MCFARLANE, and Zeo Zeonardo



AWARD WINNERS

ISF Grantees receiving Awards and Nominations at Major Industry Awards include:

BRIT Award Winner:

- Sam Fender – Winner of BRITS Critics Award, 2019

BRIT Award Nominees include:

- IDLES
- DAVE
- Wolf Alice
- Kate Tempest

Mercury Music Prize Winner:

- Wolf Alice (ISF, 2014), Winner 2018 Mercury Award

Mercury Music Prize Nominees include:

- Black Midi
- Dave
- IDLES
- Little Simz
- Novelist

- Nadine Shah
- Kate Tempest

AIM Awards

2019 AIM Award nominees supported through the ISF include:

- Freya Ridings
- Georgia
- Jade Bird
- Little Simz
- Nilüfer Yanya
- AJ Tracey
- Black Midi
- Dave
- Ezra Collective
- Kokoroko
- IDLES

MOBO Awards Winners:

- DAVE
- Moses Boyd

Rated Award Winner:

- AJ Tracey

Jazz FM Award Winners:

- Nubya Garcia
- Moses Boyd

Americana Awards UK Winners:

- Yola
- Lewis & Leigh

BBC Folk Award Winners include:

- The Young'Uns
- Sam Lee

Scottish Album of the Year Winners and Nominees:

- Anna Meredith (Winner)
- Kobi Onyame (Shortlist)
- Free Love (Shortlist)

Welsh Music Prize Winner:

- Boy Azooga

INTERNATIONAL SHOWCASE FUND PARTNERS

About PRS Foundation

PRS Foundation is the UK's leading charitable funder of new music and talent development. Since 2000 PRS Foundation has given more than £32 million to over 6,800 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 Foundation supports an exceptional range of new music activity – from composer residencies and commissions to a network of talent development partners and showcases in the UK and overseas.



www.prsfoundation.com | [@PRSFoundation](https://twitter.com/PRSFoundation)

About DIT

The Department for International Trade (DIT) helps businesses export, drives inward and outward investment, negotiates market access and trade deals, and champions free trade.



<https://www.gov.uk/government/organisations/department-for-international-trade>

About British Underground

British Underground is an arts development agency supporting international showcasing of UK talent in music, technology and culture. The company is an Arts Council England NPO housed in the Musicians' Union HQ and is a PRS Foundation Talent Development Partner.



www.britishunderground.net

About Arts Council England

Arts Council England is the national development body for arts and culture across England, working to enrich people's lives. We support a range of activities across the arts, museums and libraries – from theatre to visual 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 2018 and 2022, we will invest £1.45 billion of public money from government and an estimated £860 million from the National Lottery to help create these experiences for as many people as possible across the country.



www.artscouncil.org.uk

About PPL

Founded in 1934, PPL is the UK music industry's collective management organisation (CMO) for over 100,000 performers and record companies. We license recorded music in the UK when it is played in public (shops, bars, nightclubs, offices etc.) or broadcast (BBC, commercial radio, commercial TV etc.) and ensure that revenue flows back to our members. These include both independent and major record companies, together with performers ranging from emerging grassroots artists through to established session musicians and influential festival headliners.



We also collect performance rights internationally when music is played in public and used on TV, radio and some online streaming services, as well as for private copying. This is achieved through our network of 92 agreements with CMOs around the world. International revenues are an increasingly important revenue stream for performers and recording rightsholders – since 2006 we have collected £429.1 million.

In 2018 we collected £246.8 million while also distributing money to 105,192 performers and recording rightsholders.

www.ppluk.com | [@PPLUK](https://twitter.com/PPLUK)

About Musician's Union

The Musicians' Union is a globally-respected organisation which represents over 30,000 musicians working in all sectors of the music business. As well as negotiating on behalf of musicians with all the major employers in the industry, the MU offers a range of services tailored for the self-employed by providing assistance for professional and student musicians of all ages.



www.themu.org

About Creative Scotland

Creative Scotland is the public body that supports the arts, screen and creative industries across all parts of Scotland on behalf of everyone who lives, works or visits here. We enable people and organisations to work in and experience the arts, screen and creative industries in Scotland by helping others to develop great ideas and bring them to life. We distribute funding provided by the Scottish Government and the National Lottery.



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This Is The Kit



AJ Tracey

About Wales Arts International

We facilitate international work in the arts through collaborations, projects, networks and communication. We provide advice and support to artists and arts organisations from Wales who work on an international level. We are also a contact point for international artists and arts organisations working in Wales.



Wales Arts International fosters international artistic excellence in Wales and ensures international impact and recognition for the arts and culture of Wales.

Wales Arts International is a partnership between Arts Council of Wales and British Council.

wai.org.uk

About Arts Council of Wales

Arts Council of Wales is responsible for funding and developing the arts in Wales. We believe the arts are central to the life and wellbeing of the nation. We invest public funding, using these funds to create opportunities for people to enjoy and take part in the arts.



Our principal sponsor is the Welsh Government. We also distribute funding from the National Lottery and raise additional money where we can from a variety of public and private sector sources. Working together with the Welsh Government, we are able to show how the arts are helping to meet the Government's policy ambitions.

arts.wales

About Arts Council of Northern Ireland

The Arts Council of Northern Ireland is the lead funding and development agency for the Arts providing support to arts projects throughout the region, through its Treasury and National Lottery funds. Our funding enables artists and arts organisations to increase access to the arts across society and deliver great art that is within everyone's reach.



LOTTERY FUNDED

National Lottery-funded arts programmes are bringing communities closer together, tackling prejudice, racism, isolation and mental health and improving emotional wellbeing.

www.artscouncil-ni.org | (twitter) @ArtsCouncilNI | (facebook) \ArtsCouncilNI

The Arts Council of Northern Ireland Lottery Fund distributes a share of the money raised by The National Lottery for good causes.

- Over £30m is raised for good causes every week
- More than 500,000 projects have been funded
- Over £36bn has been raised since the Lottery started

About Invest NI

As the regional business development agency, Invest NI's role is to grow the local economy. We do this by helping new and existing businesses to compete internationally, and by attracting new investment to Northern Ireland. We are part of the Department for the Economy and provide strong government support for business by effectively delivering the Government's economic development strategies.



invest.ni

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www.prsefoundation.com



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