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ADMINISTRATIVE REPORT

Report Date:	July 6, 2018
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Meeting Date:	July 10, 2018

TO: Vancouver City Council

FROM: General Manager, Arts, Culture and Community Services

SUBJECT: Vancouver Music Strategy – Interim Report

RECOMMENDATIONS

A. THAT Council acknowledge that Vancouver is home to a vibrant, diverse and world-class music industry, which generates significant economic impact, contributes to community well-being and is a vital part of the city's social, artistic, and creative ecology.

B. THAT Council approve $400,000 one-time funding to support early initiatives arising from the extensive Vancouver Music Strategy work to date, as identified by the Vancouver Music Steering Committee, the Vancouver Music Advisory Committee, and City staff. The source of funds to be the 2018 Innovation Fund, allocated to:

   i. A temporary full-time staff resource with a focus on the music sector, to complete the Vancouver Music Strategy final report and deliver on recommendations, as per this report. The final Vancouver Music Strategy report and recommendations will be aligned with other City of Vancouver strategies, initiatives, and policies; and,
   ii. Grants to Vancouver-based, music-focused projects aligning with the current directions identified in this report.

C. THAT Council direct staff to explore opportunities to further align and leverage the funding in Recommendation B, through alignment with Cultural Services grants, and partnerships with existing programs at all three levels of government, including Creative BC's Music Fund, the Department of Canadian Heritage's Canada Spaces Fund, and FACTOR.

D. THAT Council authorize the General Manager of Arts, Culture and Community Services to negotiate and execute any agreements required to partner with other agencies as described in Recommendation C, on the terms and conditions set out herein and such other terms and conditions as are satisfactory to the General Manager of Arts, Culture and Community Services and the Director of Legal Services.

REPORT SUMMARY

This interim report comes forward at a time when there is unprecedented alignment of policy priorities with key partners and other levels of government, particularly with initiatives already underway at the Provincial level. The recommendations in the interim report are based on extensive stakeholder engagement and research.

This report provides an update on the work arising from a February 2016 Council motion to develop actions to support the music industry in Vancouver. It is presented in advance of the Vancouver Music Strategy final report and recommendations. This interim report highlights initiatives that can commence immediately, as well as findings for consideration within the larger context of other City of Vancouver strategies, including the Creative City Strategy.

Staff request Council approval of the priority recommendations detailed in this interim report, in order to leverage investment opportunities in partnership with the community, other agencies, various levels of government and the private sector. Approval of the recommendations would address critical issues the music community currently faces in interacting with the municipal departments, and strengthens the music sector's overall capacity within the creative sector ecology. Approval of the recommendations would better position the music sector to participate in, and benefit from, other related City of Vancouver strategies, initiatives, and policies.

COUNCIL AUTHORITY/PREVIOUS DECISIONS

- In 2008, Council adopted the *Cultural Facilities Priorities Plan 2008* (RTS 07315) as a part of the implementation strategy of the *Culture Plan for Vancouver, 2008 – 2018* (RTS 06994), which outlined strategies for enabling the sustainable creation and operation of cultural spaces.

- In 2013, *Vancouver's Culture Plan: Strategic Directions* (RTS 10309) was presented to Council providing a framework to support a diverse, thriving cultural ecology with a key objective to partner with the arts and cultural community and others, to retain, enhance and develop affordable, sustainable cultural spaces in Vancouver.

- In February 2016, Council passed a motion directing staff to explore options for improving City support for musicians and the music industry.

- In December 2016, Council passed a motion directing staff to update the City's Special Events Policy.

- On May 2, 2017, Council passed a motion directing staff to develop a Creative City Strategy – a new, comprehensive plan and vision for arts, culture and creativity in Vancouver.

- On May 2, 2018, Council approved an amendment directing staff, as part of the City's Creative City Strategy, to establish a "Nightlife Council" that combines safety, security, transportation, economic development, and vibrant street life, integrating lessons learned from the Granville Entertainment District Safety and Security Working Group.

CITY MANAGER'S/GENERAL MANAGER'S COMMENTS

On May 15, 2018, Cultural Services staff provided an update to Council on the Creative City Strategy early findings and engagement. As Vancouver continues to experience growth in its urban landscape, so too does the cultural and creative ecology of the city continue to develop. The diverse challenges faced by the music sector reflect some of the larger issues facing artistic and creative communities in Vancouver, such as the loss of affordable and accessible cultural spaces.

This report provides initial recommendations and future considerations to support a vibrant, sustainable and innovative music sector in Vancouver. While further staff analysis is required to complete a final strategy, the early recommendations in this report reflect community consultation, external research funded through Creative BC, FACTOR, and music industry partners, and guidance from both a steering committee and advisory committee of key stakeholders.

The ongoing work to finalize the Vancouver Music Strategy report and recommendations will align with the development and implementations of other related City of Vancouver strategies, initiatives, and policies.

REPORT

Background/Context

Vancouver has a proud history of nurturing, creating, and exporting music; it is home to world-class ensembles and recording facilities, celebrated live music, globally-recognized recording artists, diverse music festivals, and award-winning music companies. Whether in public spaces, community venues, clubs or large stadiums, Vancouverites continue to embrace the power of music to bridge cultural and social divides, to transform communities, and to inspire positive change.

British Columbia is the third largest centre for music production and live music in Canada, placing Vancouver in a position to sustain a thriving local music industry. BC boasts over 160 recording studios, over 285 music companies, and more than 400 festivals that take place across the province each year.

Research shows that music is an economic driver and a tool for urban development and social transformation. Governments, policymakers, academics, music industry professionals, and urban planners have identified the role of the music industry as a tool for:

- Creating jobs
- Increasing local revenue without raising taxes
- Streamlining and promoting public transport
- Stimulating tourism
- Regenerating urban areas
- Retaining and attracting talent and investments
- Social integration and the rationalization of urban infrastructure[1]

The recent study by Sound Diplomacy calculates the economic impact of the music ecology in Vancouver at over $690 million, with over 7,945 full-time equivalent (FTE) direct music jobs in Vancouver, including music artists (see Appendix C).

However, similar to other sectors, the Vancouver music community faces challenges posed by the lack of affordable housing and music spaces, inadequate remuneration, municipal red tape, as well as missing infrastructure to develop the next generation of music artists and music industry professionals.

Strategic Analysis

Following direction from Council in July 2016 to explore options to better support musicians and the music sector in Vancouver, staff established a Vancouver Music Steering Committee and an Advisory Committee to help inform the development of a music strategy. Together, the two Committees articulated the following high-level strategy framework elements to guide the strategy development process:

Purpose
The Vancouver Music Strategy addresses the current gaps in the music ecosystem by supporting musicians and music industry professionals working and living in our city, engaging audiences, promoting music tourism and education, and removing municipal barriers, to create a sustainable, resilient, and vibrant music industry for generations to come.

Vision
Vancouver: A place for music.

Objectives
- Promote a sustainable, resilient, and vibrant music industry through a shared value proposition.
- Ensure music has a seat at the table in land-use planning and space-making.
- Foster collaboration with the nightlife industry, removing barriers that prevent economic growth.
- Celebrate all genres and music cultures in the spirit of diversity and inclusivity.
- Capitalize on our multicultural competitive advantage, making Vancouver the first stop to Asia.
- Provide affordable, safe, and accessible places to create, produce, consume and export music to the world.

[1] https://blogs.iadb.org/ciudadessostenibles/2016/04/29/music-cities-2/

- Attract and retain music artists and music industry talent that strengthens the creative economy.
- Support music education for youth and underserved communities.

Strategic Themes

From summer 2016 to spring 2018, the Steering Committee, with input from the Advisory Committee, examined the strengths, weaknesses, and gaps that exist within Vancouver's music ecosystem. The committees identified the following Strategic Themes for consideration:

1. **Municipal Support**
   Partners in all things music: The City will work alongside the music and nightlife industry to support, promote, and champion music, removing barriers to its enjoyment that will benefit Vancouver and its residents.

2. **Music Ecology Sustainability**
   Equipped for the future: Through innovative problem-solving, partnerships and alliances, conditions will be created for across-the-board growth which leaves no participant behind in the music community.

3. **Spaces and Places**
   Making room for music: Working with City departments, safe spaces and places will be animated with music, and every effort will be made to prevent net loss in music venues, rehearsal spaces, and recording studios.

4. **Audience Engagement**
   Music for everyone: All genres of music will be accessible for all residents of Vancouver, creating a culture of music appreciation and engagement which connects community to place.

5. **Music Tourism**
   Sonic attractions: Vancouver will build on its international reputation and rich history in live music to become one of the world's premiere music destinations for tourists and residents, providing a positive social, cultural, and economic impact on our city.

6. **Music Education**
   The next generation: Educational experiences will be created for youth to nurture an appreciation for music, both as music creators and consumers of music, as well as potential career paths within the music industry.

7. **Music Artist Development**
   Locally grown, globally known: Opportunities will be provided for local music talent to thrive, creating a pathway to the world stage.

8. **Music Industry Professional Development**
   Serving the industry: Partnerships will be formed with creative organizations to promote professional development and networking opportunities that will build capacity and knowledge, allowing Vancouver's music industry to compete globally.

External Research

During 2017- 2018, two significant research studies were conducted on the local and provincial music industry, and are anticipated to provide significant data to support the development of the music strategy:

- Funded by Creative BC and FACTOR, qualitative and quantitative research on the impacts of the music industry in Vancouver was commissioned by Music BC and conducted by Sound Diplomacy. Sound Diplomacy facilitated public engagement with music industry stakeholders via interviews and roundtable discussions.

- Funded by Creative BC and music industry partners, Nordicity undertook Music Canada Live's study *Here, the Beat: The Economic Impact of Live Music in BC*.

The final research report from Nordicity was delivered in May 2018, and can be found as Appendix A; the executive summary report from Sound Diplomacy, released July 2018, is attached as Appendix C. Both research reports will provide invaluable input into the Vancouver Music Strategy, as well as Creative City Strategy considerations.

Strategic Alignment

The recommendations in this interim report support the objectives and strategic themes of the emerging Music Strategy and are in alignment with early findings of the Creative City Strategy, Making Space for Arts and Culture, the Healthy City Strategy, City of Reconciliation goals, Vancouver Economic Action Strategy, and the Tourism Master Plan.

Moving forward, the strategy's development will be aligned and integrated with other key initiatives including Special Events Motion, Places for People (Downtown Public Space Strategy), Plaza Stewardship, Liquor Policy Review, Development and Building Regulatory Review, and Support for Small Business Strategy.

Next Steps: Immediate Actions and Finalizing Strategy

Work on the Music Strategy began in the summer of 2016, and while there are understandable reasons that the work is still ongoing – including robust engagement with sector Committees; the need to align with other City of Vancouver strategies, initiatives and policies, including the Creative City Strategy and Making Space for Art, and the desire to wait for the results of two significant pieces of research on the music sector – sector interest in seeing some tangible action is high.

The work of the Steering Committee and Advisory Committee to identify objectives and strategic themes, and the early findings of the Creative City Strategy and Making Space for Art, have laid an effective foundation for the contemplation of early actions in advance of the final Strategy. Staff have reviewed these inputs as well as reviewed final and draft results from the two external consultant research reports and recommend a series of immediate actions that are anticipated to both enable the continuation of work on the final Music Strategy and produce some tangible benefits to the music community that align with the framework set out by the Steering Committee.

Recommended Immediate Actions and Future Considerations

Staff recommend a series of actions, to be funded by the Innovation Fund in collaboration with government and industry partners (*items require direct budget support), that can be initiated immediately as they clearly align with the emerging themes identified through the work on the Creative City Strategy and Making Space for Art. Additional recommendations will be developed over the next few months as staff work to finalise the Strategy in alignment with other key City arts related strategies currently in development.

Several other compelling ideas have arisen both during discussions with the Steering Committee and Advisory Committee and through the consultants' research reports. Some of these ideas do not yet clearly align with other strategies or have significant structural, financial, or partner implications and so require further analysis. Staff have identified these ideas for consideration over the next few months as part of the efforts to finalise the Music Strategy. Importantly, the ideas identified below for future consideration are representative of the diversity of considerations and do not constitute a final or exhaustive list.

1. **Municipal Support**

   The City is committed to supporting the work already underway by FACTOR, Creative BC, and Music BC, and other partners to strengthen the local music industry.

   Immediate Actions
   - Fund a TFT staff resource with a focus on further advancing work on the final music strategy and other related policy work and working with City Departments and industry partners on quick starts noted in this interim report, including exploring a pilot approach to supporting the industry's interactions with City processes.*
   - Ensure the music industry is represented in existing and future community advisory groups (including Arts and Culture Policy Council, Creative City Strategy External Advisory Committee, and others).
   - Ensure music community is represented in Noise (Sound) Bylaw Review.
   - Review Cultural Grants with a music lens.

   Future Considerations
   - Further explore the research and recommendation related to the concept of a Music Office, including further analysing the underlying interests related to this role and potential solutions.
   - Establish a Music Council (or similar council) to advise the work of City staff moving forward.
   - Work with Cultural Services and the Development and Building Regulatory Review to consider streamlining and identifying processes that affect the music sector.

2. **Music Ecology Sustainability**

   Fair remuneration and the health and well-being of our music artists and music industry professionals will ensure a sustainable, resilient, and vibrant future.

   Immediate Actions

- Explore implementing “Fair Play” certificate for venues and festivals that promote best practices in artist booking.

Future Consideration

- Provide input into developing Poverty Reduction Plan as it relates to musicians.
- Advocate for resources and support for musicians and music industry professionals with dis/abilities and mental health challenges.

3. Spaces and Places

Affordable, safe, and accessible spaces are required by musicians, music industry professionals, and audiences, so they may enjoy the creating, performing, and experiencing music.

Immediate Actions

- Work with Cultural Services and other departments, towards music spaces that are accessible to all.
- With Infrastructure and Spaces grants, explore funding work that focuses on provision of music spaces, including those for rehearsal, recording, and presentation, as well as housing.*

Future Consideration

- Explore a three-star certification for venues and promoters applying internal safety, accessibility, and diversity policies at all levels.

4. Audience Engagement

Engaging music audiences of all cultures, ages, and other demographics, including underprivileged and underrepresented groups, is important in building a diverse music community.

Immediate Actions

- Explore funding opportunities, with partners, to provide access to all-ages music performances in community centres and non-traditional spaces.*
- Explore funding opportunities, with partners, to provide micro-grants for media publications that will grow and promote the local grassroots music scene.*

Future Consideration

- Explore the development of a communications & marketing campaign for music in the city, including an online presence.

5. Music Tourism

As the third-largest live music market in Canada, there is an exciting opportunity for Vancouver to become a global music tourism destination.

Immediate Actions

- Work with Tourism Vancouver to integrate local music in the design of Vancouver’s visitor experience.

Future Consideration

- Explore branding Vancouver as a “place for music” and promote at various points including YVR.
- Work with Tourism Vancouver to develop a Music and Cultural Tourism Strategy (including standardized data collection).
- Explore the creation of a music alliance with the City of Seattle and the City of Portland.

6. Music Education

Education and music education is not typically a role of municipal government; however, the City does have several service departments who offer a variety of programs, such as the Park Board and Public Library, and could potentially work with industry partners to identify opportunities.

Immediate Actions

- Explore funding opportunities for the music community to partner on providing music education opportunities with Vancouver Public Library and other institutions.*
- Support non-profit organizational partners who offer music education opportunities to emerging artists.

Future Consideration

- Support community partners to work with Vancouver School Board (VSB) and Coalition for Music Education in BC (CMEBC) to develop a music education network.

7. Music Artist Development

The *Vancouver Charter* limits the City’s ability to fund individual artists; however, there are opportunities to explore partnering with other government organizations.

Immediate Actions

- Explore funding opportunities, with partners, for Indigenous and underrepresented music artists to create and perform.*

Future Consideration

- Explore the development of a music artist development program with Metro Vancouver cities.

8. Music Industry Professional Development

The City has the opportunity to convene and facilitate networking opportunities, as host and in partnership, with other agencies such as Music BC, Creative BC, and FACTOR.

Immediate Actions

- Partner with creative organizations that provide professional development and networking opportunities for musicians.

Future Consideration

- Support projects that facilitate knowledge exchange or industry forums.

Implications/Related Issues/Risk

Financial

This report recommends one-time funding of up to $400,000 to address priorities, based on Vancouver Music Strategy early findings. Source of funding to be the 2018 Innovation fund. As per Innovation Fund guidelines, any City dollars invested would be matched by partner agencies and /or other levels of government, at a 1:1 ratio or higher (see Appendix B). Any ongoing funding needs of this program will be reviewed as part of the 2019 annual budget process.

Table 1 – Financial Implications – and Innovation Fund Lever

Action	**Amount**	**Matching**	**Notes**
TFT Cultural Planner (one year)	$100,000		
Partner Organization Programs	$200,000	$200,000	Partner contributions
COV Programs	$100,000	$400,000	Private sector, provincial and federal public sector and earned revenue sources
Total	$400,000	$600,000	

**For details on external investment leverage, please see Appendix B*

Table 2 – Innovation Fund Alignment

<table>
<tr><th>City Priorities</th><th>Project Alignment</th><th>Outcomes</th></tr>
<tr><td>Music Strategy Objectives and Themes</td><td>-Promote sustainable music industry
-Celebrate diversity and inclusivity in all genres of music
-Provide safe and accessible places to create, produce, consume and export music
-Support music artist development</td><td rowspan="3">-Cultural Planner with focus on music industries, as liaison between various COV departments, local musicians, industry, and NPO groups and international agencies

-Cultural Planner with focus on music industries to lever partnerships and investment for greater impact in promotion, celebration of music sector

-Partner investments for projects to support professional development, access to space, promotion, education, accessibility, under-served artists, Indigenous music and musicians

-Partner investments to augment existing programs to support</td></tr>
<tr><td>Healthy City Strategy</td><td>-Increase public participation and engagement in the arts</td></tr>
<tr><td>Creative City Strategy / Making Space for Arts</td><td>-Visibility and investment
-Collaboration
-Capacity
-Equity and Access
-Reconciliation
-Summarize high level Making space for arts rec’s or attach to broad buckets</td></tr>
</table>

	of CCS early findings above	music projects that implement music strategy priorities (projects, cultural infrastructure, capacity, individual artists fund, etc.)
Reconciliation	-Promote Indigenous peoples arts, culture, awareness and understanding	-More support and visibility for Indigenous musical forms, music artists
Vancouver Economic Action Strategy	-A high performing economy that successfully levers the City's global profile and its momentum as a centre of innovation and entrepreneurship	-Growth of the music sector with a focus on local talent and artists
Tourism Master Plan	-Provide compelling destination experiences that reflect the unique culture and diversity of Vancouver	-Attract more tourists and tourism investment to Vancouver with diverse and distinctive music offerings and experiences.

This report recommends a one year temporary full-time position embedded in Cultural Services to continue the work on finalizing the Music Strategy as well as advancing the quick start immediate actions in this interim report and considerations related to nightlife in Vancouver.

CONCLUSION

A sustainable, resilient, and vibrant music sector in Vancouver includes both non-profit and for-profit entities who contribute to local economic development and overall quality of life across communities. A thriving music sector creates jobs, stimulates tourism, helps build Vancouver's distinctive city brand, and fosters artistic growth while helping to attract and retain talent, bring in investment from diverse and complementary industries and opens up opportunities for a multitude of creative expressions.

Vancouver is well-positioned to join many other Canadian and international cities in benefiting economically, socially, and culturally from the implementation of a music-focused strategy. The final Vancouver Music Strategy will be an integral part of the new, comprehensive Creative City Strategy and its holistic framework.

* * * * *

Appendix A

Here, The Beat: The Economic Impact of Live Music in BC

FINAL REPORT

MAY 2018

MUSIC CANADA LIVE

The voice of live music in Canada

La voix du spectacle musical au Canada

Report prepared by:

Nordicity

Acknowledgements

Music Canada Live is the voice of Canada's vibrant live music industry, working to advance and promote its many economic, social and cultural benefits. Founded in 2014 as a champion for the collective mission of the live music industry, Music Canada Live is an expert resource for members, including concert promoters, festivals, presenters, venues, agents, ticketing companies, industry associations and suppliers. Advocacy efforts focus on policy advancement, funding, public awareness, research, and activities that unite, highlight and galvanize the work of the live music sector.

Funding for this project was provided by Creative BC and the Province of British Columbia.

Any opinions, findings, conclusions, or recommendations expressed in this material are those of the Nordicity project team and/or industry stakeholders consulted, and do not necessarily reflect the views of Creative BC or the Province of BC. The Province of BC and its agencies are in no way bound by the recommendations contained in this document.

Thank you to the following members for their generous support.

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EXECUTIVE SUMMARY

The live music sector in BC – managers, promoters, venues and festivals – is one of diversity and growth, impacting communities large and small across the province. A growing sense of community and coordination within the sector has provided a foundation for BC stakeholders to fall back on where, historically, little external support has existed.

Sector-wide optimism is due, in part, to the recent establishment of Amplify BC (BC's music fund administered by Creative BC). The survey found that 80% of the province's live music companies, for example, expect growth in revenues and attendance in the coming year. Also on the rise is a desire to nurture diverse audiences, promote what is a vibrant festival economy, and forge new connections with BC's tourism sector. The live music sector in BC is poised to meet these developments.

In 2017, BC's live music sector contributed 6,950 FTEs, $619.3 million in labour income and $815.8 million in GDP to the provincial economy.

While many stakeholders noted the sector's undervalued past, the importance of the sector is slowly being recognized by both municipal and provincial governments. Multiple strategies for supporting the sector are being implemented (e.g., Vancouver and Victoria's music strategies). The affordability of urban centres remains widely acknowledged by live music companies as a key challenge, however, reflected in recent venue closures and difficulties in retaining talent.

Tegan and Sara
Photo credit: Michelle Edwards

BC's live music companies are being forced to be inventive about finding new sources of revenue to avoid increasing ticket prices and squeezing the limited disposable incomes of their audiences. Without operational grants, companies are increasingly trying to bring in external partnerships and sponsorships, often with little success. Festivals are typically having to rely on international acts, and the attraction of tourists is often central to their business models.

For all of its challenges, the live music sector's influence on the social and cultural fabric of its communities is undeniable. In an age of digital entertainment, live music provides a unique connection between audiences and performers. Indeed, BC stages need to be recognized as the heart of the provincial music economy, and their communities.

A summary of key findings:

- There exists a **growing sense of community** and momentum within BC's live music sector; stakeholders are increasingly seeing themselves as an important and inclusive whole.
- **Digital technology** and **diversity practices** are causing the most fundamental changes to BC's live music companies' business models.
- In the next year, 78% of festivals **expect to see an increase in attendance**, 59% of venues expect an **increase in fill rates**, and more than half of BC promoters **expect to book more shows**.
- BC's **geographical 'isolation'** can be a challenge for both touring artists and those booking shows.
- Increased operational costs, property taxes, and both wage and artist fee demands are placing **direct and indirect constraints** on the industry and its audiences.
- There has long existed a **lack of public support structures** to sustain industry operations and effectively upskill entrants to the business of live music.
- A vibrant live music industry **provides the conditions that the broader music industry requires** to thrive. It is increasingly becoming the financial lifeblood for the wider music sector.
- BC's live music sector is seen as a **cherished 'cultural space'**, a critical home to risk-takers, innovators and place-makers, and a launch-pad to realizing artists' dreams.

The BC story told in this report is one of a growing live music sector which generates positive economic, social and cultural impacts across the province. While the future of BC's concert business is bright, there is much to do in terms of advancing and promoting its benefits.

1. INTRODUCTION

In our digital age, music is accessed anytime, anywhere. Nonetheless, live performances still offer a unique, timeless and connected **experience for audiences**. Live music is also fundamental to artists making a living today. In fact, the live music sector has become the most **important source of both artist revenue and audience development**. Globally, live music tours generate $5.65 billion USD in 2017, up $1.5 billion USD from 5 years earlier.[1] Despite the evidence, however, the importance of the live music sector has not yet been reflected across policy, programing and funding priorities.

This report **profiles the industry** and aims to lay a **foundation for effective strategies** and a **coordinated approach** to combating key challenges cited by stakeholders in BC's live music sector. It begins with an understanding of the industry's economic value and strategic position. Indeed, the **economic impact assessment** (EIA) serves a knowledge gap[2] and will act as a baseline for the industry to benchmark and measure progress over time. The report also offers insight into the **non-economic impacts** of the live music sector, including its contribution to the social and cultural fabric of BC's communities.

The timing of this work coincides with **recent and seminal activity in the music sector, globally** – from the advancement of 'Music City' strategies across Canada (e.g., Toronto, Vancouver, Ottawa), to the renewal of Creative BC's music fund (Amplify BC); from the recently launched Vision for Ontario's Live Music Sector, to the review of the Canada Music Fund. On the international stage, groundbreaking initiatives have also been born, such as the PRS Foundation's Keychange initiative, empowering festivals to sign up to a 50:50 gender balance pledge by 2022.

The findings of this study demonstrate the significant contribution live music makes to a thriving and healthy music scene and, moreover, reflect the way the music business actually works. The time has come for the story of live music in BC to be told – let it now enter the day-to-day conversations of economists, planners, licensers, tourism experts, culture professionals and music industry decision makers.

We've heard the beat. It is right here.

1.1 APPROACH

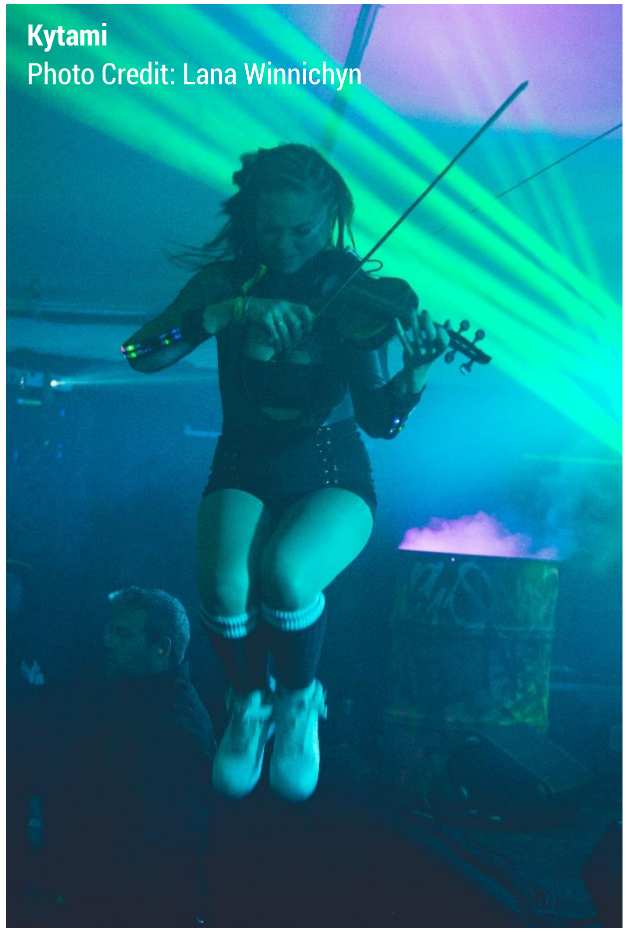
This benchmark study includes the following types of music companies, recognizing that many music companies perform a variety of tasks:

[1] Pollstar: 2011 to 2017, based on top 100 worldwide tours at that time. https://www.statista.com/statistics/380120/global-music-tour-gross-revenues/.

[2] While the PwC study estimated 2013 revenues associated with live music performances in BC, these were based solely on the per capita expenditure for live ticket sales as determined from the national data provided in the PwC Global Entertainment & Media Outlook, 2014-2018.

- Artist managers (including self-managed artists)
- Promoters
- Music venues
- Festivals (those that are primarily focussed on music).

Because this study focusses on the companies operating in BC's live music sector, it does not directly account for artists – with the notable exception of artists that assume the function of a music company (i.e., self-managed artists).


Kytami
Photo Credit: Lana Winnichyn

The Nordicity team created an online survey, which subsequently captured usable information from **123 companies** operating in BC's live music sector. For the purposes of this study, a response was counted as usable if it provided basic financial information. Based on secondary research, Nordicity identified a total of **903 companies operating in the live music industry in BC**, implying survey coverage of just under 14% of the total number of potential respondents (or, universe).[3] Important to note is that within this 14% are eight of the biggest music companies in BC. With music driven revenues ranging from $5 million to over $100 million, these companies constitute 26% of total sector revenue.

In addition to the online survey, the Nordicity team engaged nearly **60 stakeholders** from across the province (Appendix 1). Consultation included 1-1 interviews, as well as focus groups in Vancouver (January 9th, 2018) and Victoria (March 6th, 2018).

It is important to note that this report should not be considered a statistical exercise. Instead, it is based on a 'convenience sample' of companies that responded to the online survey. As such, the numbers reported below are best possible estimates, given the data available. Accordingly, the survey sample was 'grossed-up' using 'universe' numbers compiled from a combination of desk research and the contact lists provided by project partners. To do so, the survey sample was divided into the four types of live music companies (i.e., venues, festivals, promoters and managers). These

[3] The universes were determined using a mix of industry lists and secondary research to generate counts where data did not already exist. The universe sources are described in the specific sections for each type of live music company (Sections 2.3-2.6).

types of companies were then 'grossed up' (with large outliers removed) and aggregated to provide estimates for sector as a whole. While it is impossible to capture *all* companies in a survey of this type, the Nordicity team is confident that it captured most of the large companies operating in BC's live music sector.

In order to conduct the necessary research and analysis required for a project of this scope, the Nordicity team employed a four-phase mixed methodology, described briefly below:

1. BC's live music industry was identified through the development of a **database of live music companies (and self-managed artists)**, as well as the assessment of the number of companies that fit within the defined scope of the study.
2. Industry data on economic and programmatic activity was collected using an **online survey** between January and February 2018. Additionally, a **series of interviews and two focus groups were conducted**. This primary research was supplemented by concurrent secondary data collection (i.e., a literature review).
3. An in-depth **live music sector profile** across BC was developed, including specific insight on venues, festivals, promoters, and managers.
4. The data collected was analyzed in order to determine the **economic impact of live music** in BC as it relates to the **operation** of live music companies. In each case, the direct, indirect, and induced impacts as they relate to employment, GDP and fiscal (tax) impacts have been estimated.

1.2 Document Map

The document begins with an introduction to the report which describes the Nordicity team's **approach** to the study. Section 2 **profiles the BC live music sector** and describes key opportunities and challenges for growth. Section 2 consists of:

- A description of the **current state** of the industry;
- **Themes** that emerged from Nordicity's research;
- **Revenue, expenses and labour** information for companies in the sector;
- Description of the **core company types** (venues, festivals, promoters and managers), including financial and operational information.

Section 3 describes the **economic impact** of the BC live music sector in terms of job creation (FTEs), generated labour income, as well as GDP impacts at direct, indirect and induced levels. Additionally, fiscal impacts at federal and provincial levels are estimated.

Section 4 estimates the **economic impact of visitors** to BC who attend BC live music events.

Section 5 details the **social** and **cultural impact** of BC's live music sector.

2. BC'S LIVE MUSIC SECTOR PROFILE

The live music sector in BC is one of vibrancy and growth, impacting communities large and small across the province. With more 6,000 recording artists,[4] BC is home to the third largest live music industry in Canada. The sector is **supported by a wide array of small businesses in BC** such as promoters, venue operators, music festival organizers, production services, booking agents, ticket agents, managers and music publishers.[5] In addition to those directly involved in the sector, industries such as hospitality, tourism and transportation **indirectly support and benefit** from a robust live music industry.

Stinging Belle
Photo credit: Jade Kenny

[4] Music Canada. (2016). "BC's Music Sector: From Adversity to Opportunity" https://musiccanada.com/wp-content/uploads/2016/02/BCs-Music-Sector-From-Adversity-to-Opportunity.pdf.

[5] For the purposes of this study, the sector focuses on venues, festivals, promoters and music managers.

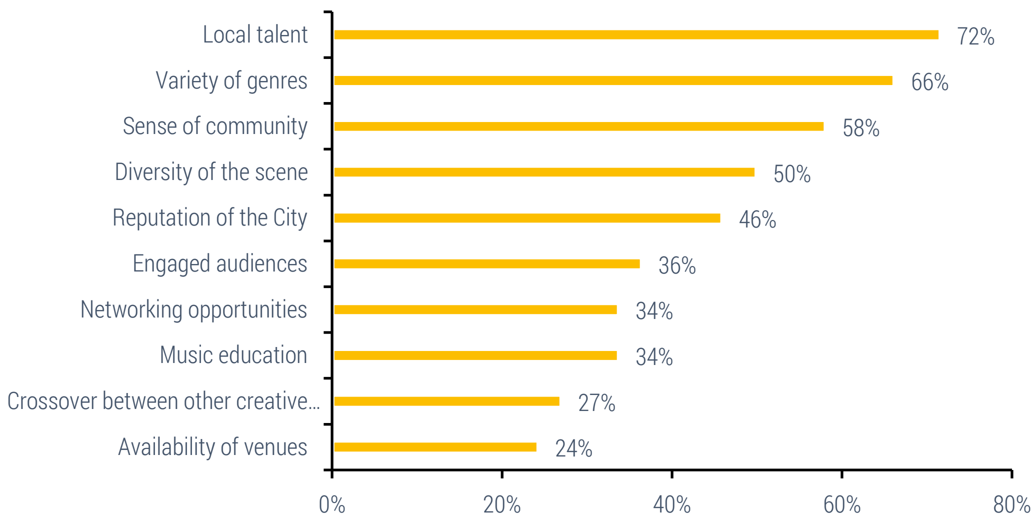
However, despite the **significant presence –** spanning annual music festivals and performances in venues of every size – the sector faces a variety of **challenges**. Difficulties in building a live audience,[6] and the shortage of suitable and affordable performance venues were commonly reported challenges. Music festivals and live music venues also face significant barriers – from property taxes to liquor licensing and noise complaints.

The following profile introduces some of the key opportunities and challenges identified through the survey, followed by a deeper dive across six key, cross-cutting themes emerging from the research.

2.1 Key Themes

As seen in Figure 1, there were a variety of live music sector 'assets' cited by survey respondents. Respondents applauded the local talent in the province, although this was dependent on the type of music or the type of talent sought (Section 2.2.3). The variety of genres and diversity of the sector (Section 5.1) and a budding sense of community (Section 2.1.1) were also widely cited as key strengths of the sector throughout stakeholder interviews and focus groups. The term 'momentum' was often used to describe the growing awareness of recent initiatives, resulting in broader enthusiasm about the future of live music in BC.

Figure 1: Biggest assets in the BC live music sector (% of respondents)



n = 74

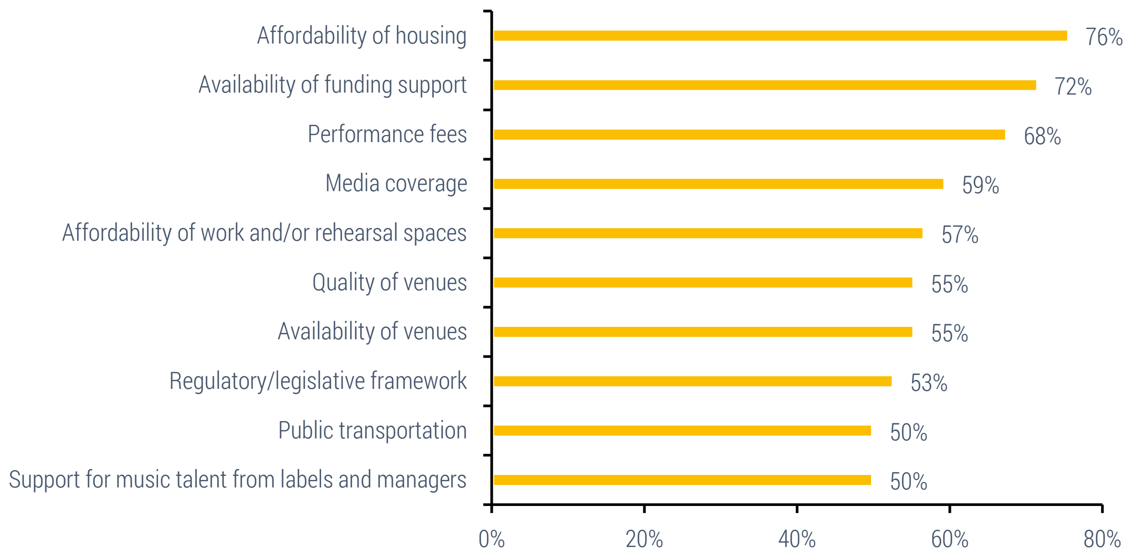
Source: 2018 BC Live Music Survey – Nordicity

Despite growing optimism and noteworthy assets in the sector, common challenges emerged from the survey data and stakeholder engagement sessions. More than half of the respondents, for example, reported unaffordable housing (56%) and lack of funding support (53%) as significant challenges. Additionally, half (50%) indicated that obtaining adequate performance fees was an

[6] Survey results revealed that nearly 40% of respondents engage with music primarily online.

ongoing challenge. Note, widely cited financial constraints across the industry are explored further in Sections 2.1.4 through 2.1.6.

Figure 2: Biggest challenges in the BC live music sector (% of respondents)



n = 74
Source: 2018 BC Live Music Survey – Nordicity

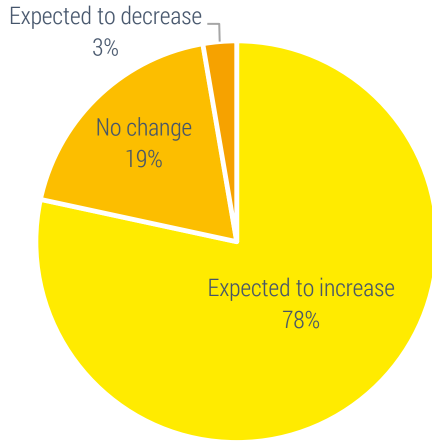
2.1.1 A Growing Sense of Community

A majority of stakeholders reported a strong sense of community and momentum within the live music sector. Such positivity can be reflected in recent BC activity such as the 2018 Junos, Vancouver's Music Strategy, Kelowna's hosting of 2018 BreakOut West, and the inclusion of music as a key pillar in the City of Victoria's 2018 Arts and Cultural Master Plan. These various efforts have facilitated conversations in the sector, building a **sense of collective identity** and **coordination**. As illustrated below, optimism was also reflected in business projections. Nearly 80% of live music companies in BC are expecting growth to continue, while less than 5% are expecting their revenues to shrink.

"Despite the absence of institutional support, there is a strong and growing community of musicians in the province who rely on each other."

Stakeholder interviewee

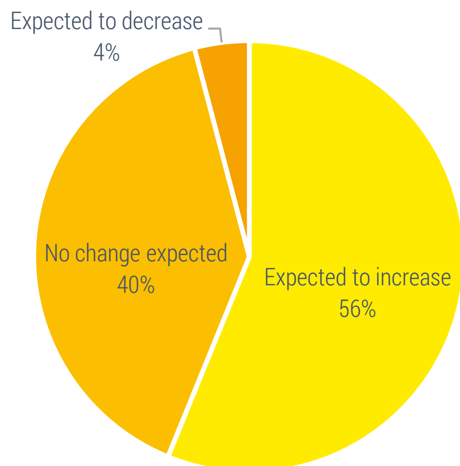
Figure 3: Change in revenue expected next year by BC live music companies (% of respondents)



n = 73
Source: 2018 BC Live Music Survey – Nordicity

A majority of companies (55%) are also expecting to hire more employees in 2018. Moreover, the industry appears to **hire from within the province** – 94% of employees in the live music sector were derived from within BC. Furthermore, nearly all (98%) respondents indicated that their company's owners live in the province.

Figure 4: Change expected in headcount next year by BC live music companies (% of respondents)



n = 72
Source: 2018 BC Live Music Survey – Nordicity

However, the extent to which the live music sector has become a coherent voice was also a point of contention, with some respondents citing issues relating to silos and elitism in the sector. Others pointed to the lack of coordination required to effectively advocate and move the sector forward. As put by one interviewee, "People are supportive of each other when we actually get together, but we are actually **very disjointed**. We should have already known each other, yet it's taken some serious coordination to even get us in the same room together. **Once we get there, though, everyone is very supportive.**"

That said, stakeholders unanimously agreed that BC's live music sector is beginning to show signs of **increased support from within**. As several described, "A strong sense of community encourages people to try new things, knowing that if they fail, they will still have the foundation and support of broader music community to fall back on." This trend was described as "long-awaited" and is likely to further augment the reputation of BC being a great place to test innovative ideas in live music (explored further in Section 5.1).

While the provincial live music community is supportive of itself, it was noted by respondents that it was undervalued and often misunderstood by government, business representatives and, in some cases, the wider public. As a result, many stakeholders felt that there were major **gaps in external support** (Sections 2.1.5 and 2.1.6).

Indeed, from a policy perspective, live music has not enjoyed as privileged position as other creative industries in terms of planning, development and resource allocation, despite growing clarity around its economic, social and cultural benefits. As Erin Benjamin, Executive Director of Music Canada Live, explains, "Music industry policies and funding in Canada for the past 40 years have been focused through a lens that sees live music stakeholders as important, but not important enough to be regarded with true parity. Based on much of today's cultural and economic policy, the people behind live music are more often regarded as *indirectly* impacting the music business."

As tabulated below, the sector is building momentum from an increased level of coordination and sense of belongingness, but challenges remain in building external support.

Strengths	Challenges
There is a growing enthusiasm and optimism about the future of BC's live music sector.	There has not yet been a coordinated approach to 'prove' the value of the industry to external audiences.
The music community is increasingly supportive of each other.	The sector, internally, is still catching up from its relatively disjointed past.

2.1.2 Embracing Technology

Arkells
Photo credit: Michelle Edwards

Digital technology is driving multiple impacts on the live music sector, both positive and negative. On the one hand, social media and online advertising has made marketing and **engaging audiences easier than ever before**. On the other hand, inexpensive or no-cost streaming services which allow easy access to music online (e.g., Apple Music, Spotify) has led to **dwindling sales revenues for artists**, placing an increased importance on touring.

The increased **availability and breadth of data** – from social media trends to streaming preferences – has also become critical to live music operations in BC. For example, **evolving marketing techniques (e.g., hyper-targeted marketing)** were regarded as causing some of the most fundamental changes to business models in the sector.

While promoters often seek insights on streaming audiences and online popularity more broadly, managers and artists are equally wanting to ensure that the venues or festivals booking them have strong online presences. For example, Vancouver's Contact Festival has more than 18,000 followers on Instagram, meaning that being featured on its website can be a significant boost for artists.

Growth in the usage of ephemeral social media tools (e.g., Snapchat, Facebook, Instagram 'Stories') is also impacting the industry. Because posts on such platforms are typically timebound, this has reduced the amount of material online that could be **leveraged for marketing** or **fan interaction**. As opposed to traditional Facebook posts, where content is saved and viewable after an event, newer platforms (e.g., Instagram, Snapchat) encourage audience development approaches based on instant interaction. Beyond the fleeting nature of this digital trend, respondents also suggested that the explosion of app usage was having adverse effects on the atmosphere at shows, where many audience members remained glued to their phones rather than engaging with the performance.

"No question, we're being forced to adapt to technology. But there's no one really saying, 'Hey, here's the best practice on how to do that.'"

Stakeholder interviewee

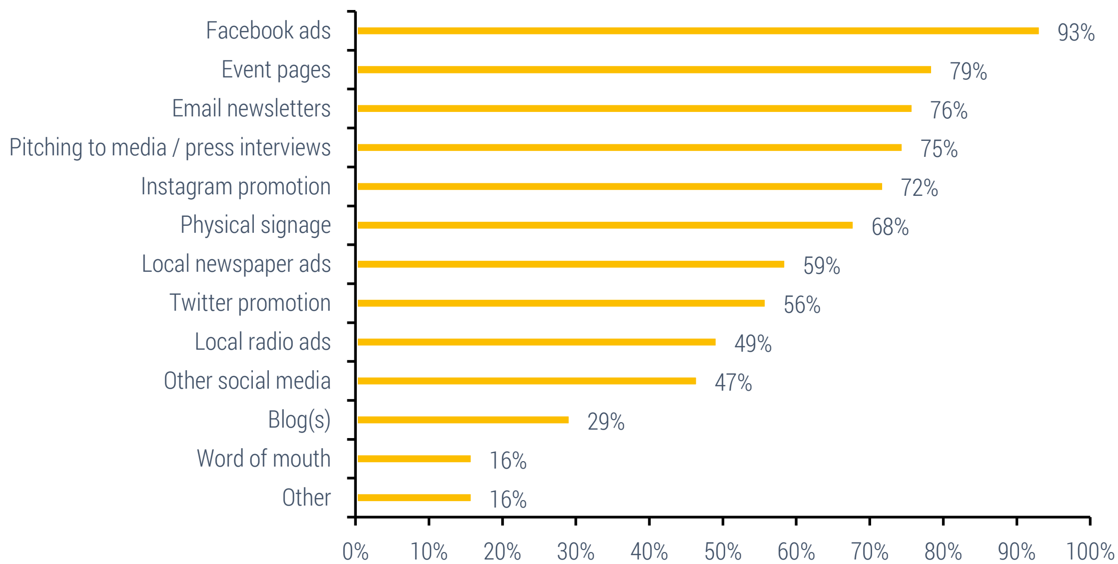
When asked if the music industry was keeping up with the pace of technological change, respondents gave mixed reviews. It was agreed upon, however, that **promoters and managers were utilizing online**

technology to maximize reach to market their events or artists. As Nate Sabine of Blueprint states, "On the manager and promoter side, this group is much more tech savvy than ever before. More of their marketing dollars are going to hyper-targeted digital advertising."

On the other hand, some respondents expressed that artists and touring acts were slow in recognizing the importance of a strong online presence. As one indicated, "Many artists believe that because they have a Facebook page, that is good enough." A **lack of online presence from artists**, however, can create challenges for promoters or venues trying to promote acts in various communities. Additionally, it was noted that while many companies were not taking full advantage of various social platforms and digital engagement approaches available to them, some were 'future-proofing' their activities by hiring digital strategists, as in the case of Vancouver's Music on Main. In terms of digital literacy, however, a rural-urban divide was also revealed, with rural stakeholders reporting that it was much more difficult to find technology-adept talent in their localities.

The survey reflected that technology is indeed a critical part of live music promotion, and Facebook was the tool of choice for majority (93%) of respondents, as illustrated below. Email and Instagram-driven promotion were also common promotional channels.

Figure 5: Promotional channels used by BC live music companies (% of respondents)



n = 75

Source: 2018 BC Live Music Survey – Nordicity

As summarized in the table below, the effects of technology are both positive and negative for BC's live music sector. Similar differences exist in the ways in which companies are utilizing technological tools available to them.

Strengths	Challenges
Live music companies are leveraging the breadth of data available to make informed business decisions.	Streaming technology has led to dwindling music revenues, and new ephemeral social media tools (e.g., Snapchat, Instagram 'Stories') are reducing online material for audience engagement.
There is growing use of digital tools (e.g., social media), as well as targeted marketing and crowdfunding to promote, fundraise and engage audiences.	Many artists are not keeping up with the digital age, making it difficult for promoters/venues to promote or plan for acts.

2.1.3 A Bumpy Yet Scenic Road

Many respondents cited BC's natural beauty as a key draw in their participation within the live music sector in BC. Indeed, the simple fact that many touring acts want to perform or work in BC was reported as an ongoing benefit across stakeholder groups. Additionally, the convenience of being close to Seattle and LA makes the province a convenient and popular stop on west coast tours.

> ***"There is a lack of other major centres near Vancouver for regional block-booking and collaborations, compared to Ontario and Quebec."***
>
> ***Robert Benaroya, Managing AD, Caravan World Rhythms Society***

However, the province's relative isolation can result in challenges related to touring in the province. BC's vast geographic area, with many communities separated by mountain ranges, lakes and oceans, can **make the cost of touring prohibitive**. Multiple stakeholders noted that when compared to Europe or the eastern seaboard of North America, the cost and time commitment of touring western Canada (or simply BC) results in artists choosing to tour elsewhere.[7] Long travel times, the cost of driving (e.g., gas, insurance), and dangerous or difficult driving conditions were all cited as critical barriers to touring efficiently in the province. As Sabine points out, "We need to be collaborating with other big cities to help get the artists here to BC. We can't service our market without efficiencies in other parts of Canada. Realistically, the big acts are only going to hit four Canadian cities."

Another contributing factor with regards to touring BC is **the existing grant structure** which may create a stronger incentive for touring outside the province than within it. Such grants were reportedly more accessible and lucrative than those with a focus on intra-provincial touring. For example, the BC Arts Council touring initiative offer grants only for companies undertaking touring

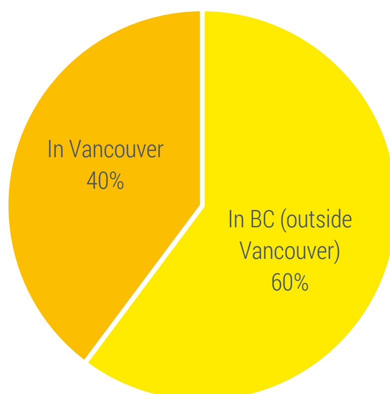
[7] These areas have highly populated cities in close proximity to each other, meaning there is a greater market potential in more contained geographic areas.

activities outside the province. However, this sentiment may point to a lack of awareness of funding schemes, given organizations like the BC Touring Council (e.g., Community Presenters Assistance Program), Music BC and the Canada Council for the Arts offer touring grants that do not have geographical restrictions.

Even from a promoter and presenter perspective, intra-provincial collaboration can be difficult. As Karma Lacoff (Creative Okanagan, BreakOut West) explains, “There is no support or framework I know of to be connected provincially to other people doing similar work and programming.” Support does exist from the BC Touring Council but, again, such structures may be underutilized by live music companies due to lack of awareness.

Live music continues to **thrive outside of city centres** such a Vancouver and Victoria, echoing through small town pubs to large stadiums across the province. As seen in Figure 6, below, the survey revealed that much of BC’s live music activity is happening outside of Vancouver. However, the ability to sustain the ripple effects of timebound music activity in smaller urban centres are not clear cut. As Lacoff further explains, “When we get big events like BreakOut West, it is a big boost, but then it plateaus. Venues will always continue to come and go.”

Figure 6: BC live music company locations (% of respondents)



n = 88
Source: 2018 BC Live Music Survey – Nordicity

The table below summarizes the strengths and challenges resulting from the perception of BC’s isolated, yet highly appealing, geography.

Strengths	**Challenges**
The province’s natural beauty is an important attraction for artists and employees alike.	BC’s relative isolation and vast geography can make the cost of touring a critical barrier.
The province is increasingly a fixture on west coast tour circuits, with bands wishing to leverage its proximity to US hubs such as Seattle, Portland and LA.	There are a lack of structures and support systems for collaborating with other Canadian cities (and providers) in booking artists in BC.

2.1.4 AFFORDING THE SOUND

Affordability is a multi-faceted challenge cited by nearly all stakeholders. For venues, significant **increases in operational costs**, especially rent and property taxes, are putting pressure on their bottom lines. As a result, many venues indicated that they are running operations that, at best, are trying to 'make ends meet'. Heather Redfern of The Cultch described a reality for her venue: "When we present music, we just expect to lose money by the time we pay all the fees, labour and taxes. The cost of labour on top of the operating costs makes it very hard to sustain our offer." These factors have contributed to the sector reporting a slight loss overall (0.8%) in 2017, as discussed further in Section 2.2.

Speaking to managers and promoters, attracting and retaining talented artists (or employees) remains a significant challenge because the **wages they can offer are increasingly insufficient** to live comfortably, especially in BC's urban centres. Some music companies, however, are taking a leadership role by prioritizing adequate pay for their artists and/or employees. For example, Vancouver's Music on Main has dedicated itself as a living wage organization,[8] offering more full-time positions and benefits.

"Ticket prices have remained the same while our rent has drastically increased. It becomes increasingly impossible to pay artists."

Roundtable participant

In addition to the direct effects of affordability,[9] financial pressures also indirectly affect the industry in terms of **decreasing demand for live music performances**. As Jordan Stewart of Guilt & Company notes, "The high cost of living leaves audiences with little disposable income." Another venue operator observed that shows were better attended in the middle of the month when most people are not feeling the constraints caused by end of month rental payments. Generally speaking, many venues and festivals feel **unable to increase ticket prices** despite rapidly rising operational costs. A 2017 Nielsen Music Survey, for example, found that cost of attendance was the largest barrier for 85% of potential attendees.[10]

Rising costs of living and venue/facility/festival operations are putting direct and indirect constraints on the industry and its audiences.

---

[8] Living Wage Employer. http://www.livingwageforfamilies.ca/living_wage_employers

[9] The Living Wage in Metro Vancouver is now $20.91 per hour, up 25% over the past decade.

[10] Nielsen (2017) Canada Live Music and Brands Report http://www.nielsen.com/ca/en/insights/news/2017/music-experience-takes-center-stage-for-live-attendees.html

Strengths	Challenges
Some live music companies have taken a leadership role in providing 'living wages'.	Live music companies are seeing increased operational and labour costs in tandem with rising property taxes.
	Potential audiences have minimal disposable income, making it difficult for venues and festivals to raise ticket prices.

2.1.5 Public Support & Strategy

"We could have a live music scene. But we do not. We don't even come close to Seattle. It is not weather. It is priorities."

Stakeholder interviewee

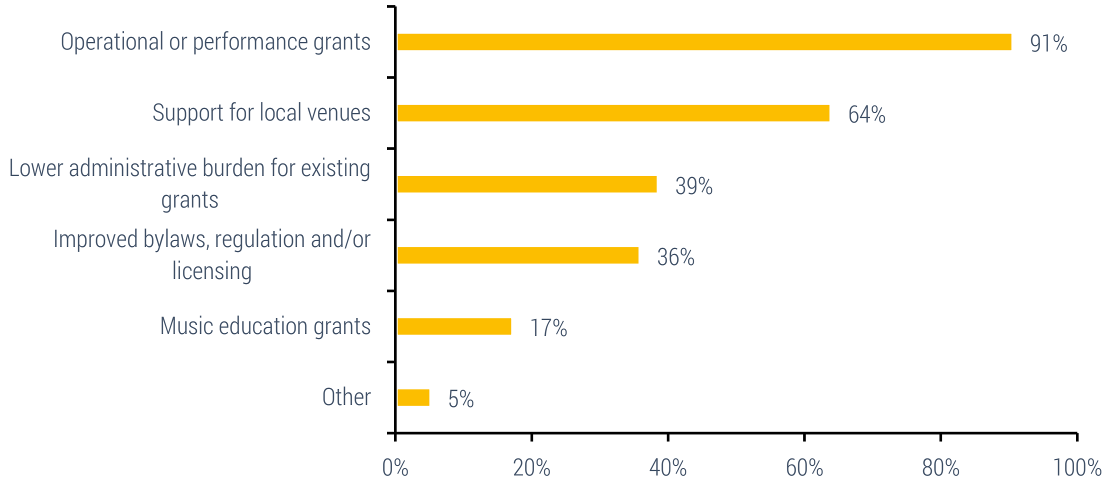
Government support was generally agreed to be an area of weakness for the live music sector in BC. As displayed in Figure 2, a lack of funding available was a common (53%) challenge. As such, ongoing operating grants were cited as a currently lacking support structure that would significantly benefit live music companies. The cyclical and uncertain nature of government support makes it difficult to, as one respondent put it, "**create sustainable programming** and, thus, maintain a sustainable industry." Without adequate support (historically), it has also been difficult for stakeholders to benefit from leveraged private and public dollars or ensure the BC music sector remains competitive with other jurisdictions.

Specifically, stakeholders cited a lack of government-funded access to **showcasing opportunities** as a key barrier to growth. Showcases (e.g., Pacific Contact, Northern Exposure) offer an impactful opportunity for artists to perform in front of new audiences and industry representatives, ideally securing future bookings at festivals and on tour circuits. While the Canada Council for the Arts' Arts Abroad program, Music BC's showcasing series, and the BC Touring Council offer some support in terms of accessing and affording showcases, several respondents noted that BC's live music sector is typically under-represented at both domestic and international showcases.

As Julie Fowler of Artswells Festival observes, "Artists from BC don't participate as much in national showcasing events that are usually in Ontario. It would be good to see more showcase opportunities here." Stakeholders noted an opportunity to grow the showcasing offer for BC talent, and for industry associations like Music BC to build off existing activities. Some cited the work of Music PEI and the UK (e.g., British Council programs) as positive case studies in providing sustained support to artists to showcase, both regionally and internationally.

As Figure 7 illustrates, the majority of BC live music company respondents believe government support should be focused on operational or performance grants (91%), followed by support for local venues (65%).

Figure 7: Areas the BC live music sector would like the government to focus on (% of respondents)



n = 75
Source: 2018 BC Live Music Survey – Nordicity

"We need to roll out the red carpet and roll back the red tape."

Roundtable participant

The following **government sources** were most commonly cited as important financial providers for the live music sector in BC:

- Creative BC – Amplify BC
- The Government of Canada's Canada Cultural Spaces Fund (CCSF)
- Regional Tourism Organizations (commonly noted for being supportive of live music marketing initiatives)
- Community Gaming Grants
- Various grants from Canada Council for the Arts (CCA), Arts BC and FACTOR

Generally, there was dissatisfaction with the level of support at the **municipal level,** particularly in the City of Vancouver. While certainly Vancouver's Music Strategy (in development) is aimed at developing a thriving and diverse music scene,[11] some respondents indicated that the City could be more supportive. The preconditions for hosting live music events (e.g., event licenses, outdoor space applications) were noted for being cumbersome and likely to incur delays. As further explored in Section 2.3 in relation to music venues, it was widely perceived that the urban densification at play in Vancouver indirectly impedes the development of a vibrant live music sector. The City of Victoria, on the other hand, was seen to have a supportive policy environment for live music, particularly

[11] City of Vancouver. (2018). "City puts local music in the spotlight with the Vancouver Music Strategy." http://vancouver.ca/news-calendar/city-puts-local-music-in-the-spotlight-with-the-vancouver-music-strategy.aspx

following the approval of its Arts & Culture Master Plan which includes multiple dedicated live music sector support objectives.

Central to the revenue of many live music venues is the **sale of liquor**. Although regulated by the Province, as opposed to the City, liquor licensing is a hot button issue across BC's live music sector. So impactful are these sales that venues reported booking events likely to result in high alcohol sales above other factors (e.g., quality of music, developing emerging artists). As Renee Crawford of the Copper Owl in Victoria noted, "This is why we transitioned to hosting more DJ nights instead of live music. There is less overhead than hosting bands and higher alcohol sales. We are in a constant state of tension as we struggle with trying to make sure that we are not over-serving patrons but making enough money to survive."

BC's liquor laws, however, are widely considered as outdated, particularly in terms of permitting minors on premises (or disallowing venues to temporarily delicense) and basing the special occasion licensing on audience size (rather than public versus private). As challenging as maintaining safe but profitable liquor sales can be for venues, it was also noted that BC's recent changes to liquor laws (January 2017) have made them less restrictive than some other provinces.[12] Some key changes include a cut to red-tape for festivals and as well as increased flexibility for the types of spaces that can serve alcohol (e.g., book stores, art galleries).

Right on Cue: Vancouver's Music City Strategy

The City of Vancouver Music Strategy is directed specifically at musicians and the music industry. It aims to boost the creative economy and seize opportunities to grow the local music scene. The strategy, which has been in development since 2016, is scheduled to be presented to City Council in the summer of 2018.

Further improvements in government investment in BC's live music sector and related support infrastructure was also noted throughout the stakeholder consultation. For example, many respondents reported that the **BC Music Fund** (renewed as 'Amplify BC') was the first time they had received significant government support. Some indicated, however, that there was not enough of a live music focus to the scheme and, for others, that it was too skewed toward the non-profit cultural sector as opposed to commercial players. However, the fund was generally perceived as a solid step in the right direction.

Most stakeholders agreed that the live music sector has gone undervalued by governments (including local) in the past, although some recent improvements were widely recognized.

[12] BC Gov News (2017) "New modern liquor laws come into effect" https://news.gov.bc.ca/releases/2017SBRT0003-000121

Strengths	Challenges
Governments, at the provincial and local levels, have begun to recognize the positive impacts generated by live music (e.g., Amplify BC, Vancouver and Victoria's music strategies)	Many bylaws and regulations in BC are still impeding the development of a vibrant live music sector, often at the city level.
	Many live music companies are struggling to sustain business models without ongoing operational grants.

2.1.6 Playing in Harmony

Only 20% of survey respondents indicated that **interaction with other creative sectors** was an asset of the live music industry (Figure 1), while interviews and focus groups revealed that this could be an area for improvement. Most of the partnerships described by stakeholders are being fostered within the music sector, such as between venues and promoters or managers (as opposed to with other creative sectors). Vancouver's post-classical promoters Music on Main, for example, have built a solid working partnership with the Fox Cabaret venue, despite operating at quite different ends of the live music ecosystem.

While strong linkages between the live music sector and any single creative industry sector were not identified, stakeholders did reveal some interactions. Notable partnerships, while limited, included the following:

- other performing arts
- audio visual
- graphic designers
- other arts and culture festivals
- film and TV
- other cultural non-profits

It was also noted that concert attendees now expect more much in a live experience. Rather than simply 'a band playing', there is an expectation around sophisticated accompanying audio-visuals, **driving increased collaborations between artists and audio-visual production suppliers** in BC. Filming opportunities also offer the potential to augment revenues for music venues, especially in the case of older venues which offer a unique character (e.g., Vancouver's Wise Hall).

> ***"Having sponsorship is key to the industry now, but technology is also enabling targeted fundraising."***
>
> *Stakeholder interviewee*

The supply of productive **external partnerships** (e.g., sponsorships, funding) was noted by most as lacking in the sector. This reality is reflective of the view that while live music is internally supportive of itself, a chasm exists in terms of value placement by the wider community. For example, multiple respondents noted the longstanding perception that the music industry is a ‘suck on the economy’ when in fact (as shown in Section 3), it generates significant economic impact for communities around BC.

Some respondents believed live music sector’s perceived lack of worth is a fundamental reason it has been difficult to source sponsorship in the province (in addition to skills gaps cited in Section 2.2.3). This can be especially challenging for smaller venues who noted that ‘go-to’ corporate **sponsors are much more responsive to large events or festivals** with more guaranteed visibility. While it was noted that small, local businesses were often open to the idea of sponsoring smaller venues, these players often do not have the necessary budgets to engage.

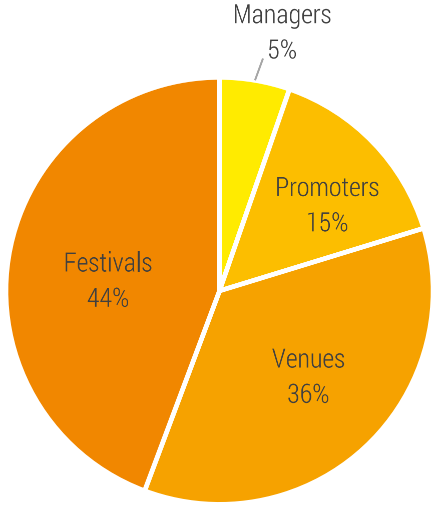
BC’s live music sector is seeing increased partnerships within itself and a few key creative sectors, but continues to struggle with developing external partnerships.

Strengths	**Challenges**
Expectations on live event experiences are driving increased collaborations between live music companies and audio-visual partners.	The value of live music is often understated, resulting in difficulties in creating meaningful external partnerships.
Technology is enabling targeted marketing and other fundraising opportunities for the live music sector.	Sourcing sponsors can be difficult, especially for small venues.

2.2 INDUSTRY STRUCTURE

BC is home to a robust live music sector, including both smaller independent players and much larger music companies, representing every segment of live music. Secondary research revealed 903 live music companies in BC, most of which are festivals (44%) and venues (36%). Sections 2.3 through 2.6 describe each of these four types of live music companies in more detail.

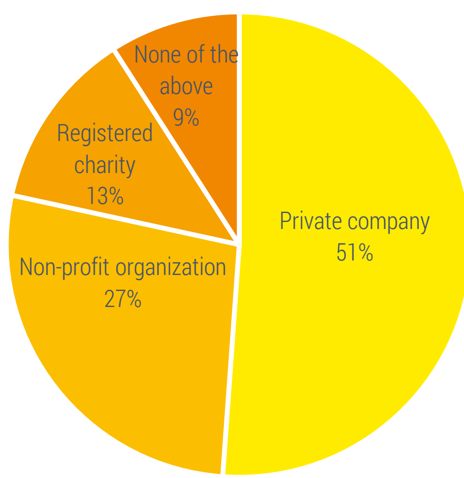
Figure 8: Breakdown of BC live music companies by type (% of respondents)



Source: Nordicity secondary research

As seen in Figure 9, a slight majority (51%) of respondents indicated that they were a 'for-profit company', with another 27% indicating non-profit status (but not registered charities).

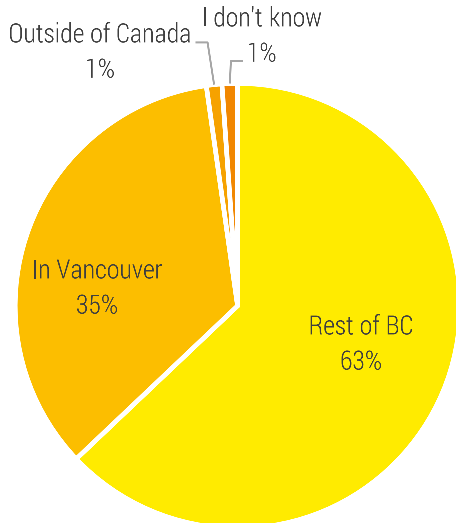
Figure 9: Breakdown of BC live music companies by corporate structure (% of respondents)



n = 88
Source: 2018 BC Live Music Survey – Nordicity

The survey revealed a strong presence of activity occurring outside of Vancouver. Additionally, it was found that most of the companies have owners residing outside of Vancouver. Furthermore, the live music sector is largely owned from within the province, with only 1% indicating foreign ownership.

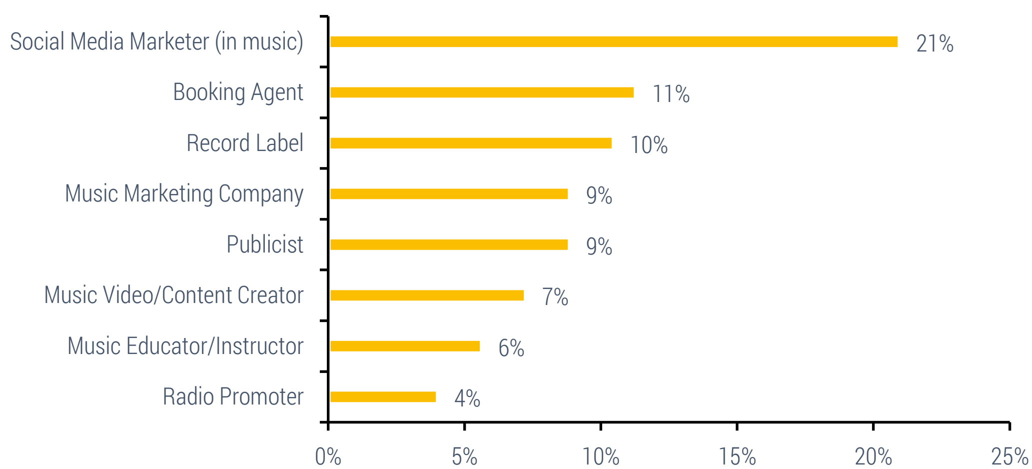
Figure 10: Location of owners of BC live music companies (% of respondents)



n = 89
Source: 2018 BC Live Music Survey – Nordicity

Despite indicating their primary role being in the live music sector, many respondents reported simultaneously participating in multiple other roles across the broader music sector. As seen in the graph below, 21% of respondents work as social media marketers in addition to their primary live music role.

Figure 11: Other roles BC live music sector participants play in the music industry (% of respondents)



n = 123
Source: 2018 BC Live Music Survey – Nordicity

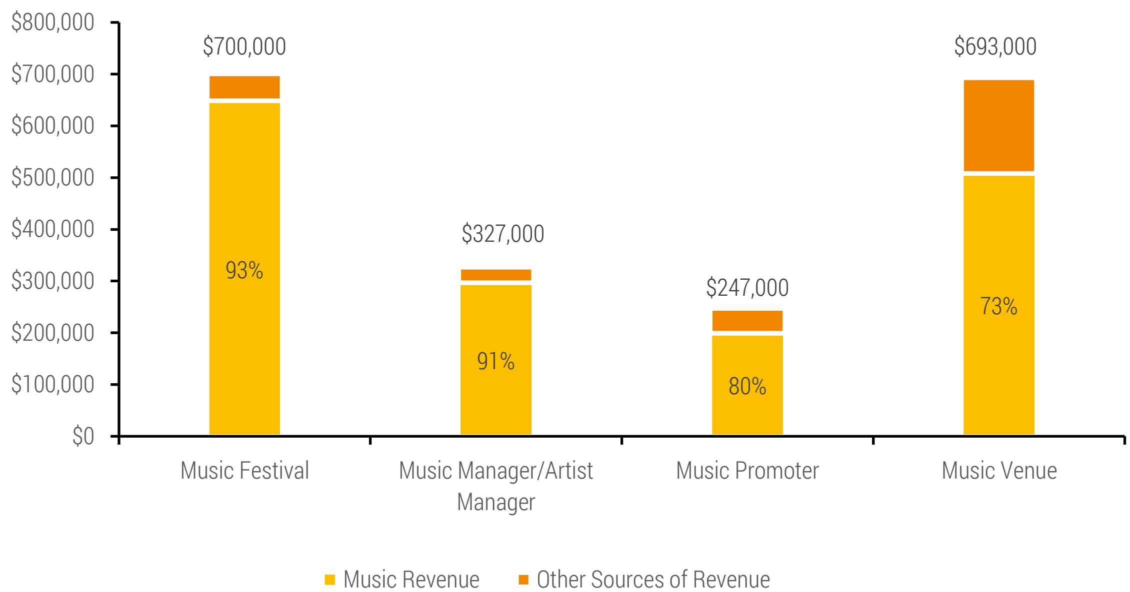
In conclusion, BC's live music sector includes a wide range of organizations and companies across the province, with many individuals operating in a variety of other roles in music sector.

2.2.1 Revenues

The live music sector generated a total of more than **$740 million in overall revenues in 2017**, of which more **than $584 million (79%) was live music-generated revenue**.

Average revenue[13] varies across types of companies as shown in Figure 12. While festivals make an average of $700,000 annually, promoters make slightly under $250,000. Festivals and venues generate approximately double the revenue compared to promoters or managers. Figure 12 also illustrates the portion of revenues that are generated from live music specifically. Festivals and managers generate a significant majority of their revenue from live music, while promoters and venues derive a larger portion of revenues from other means.

Figure 12: Average annual revenue per company type, % music-related revenue for each



n = 74
Source: 2018 BC Live Music Survey – Nordicity

[13] Averages exclude companies with revenues over $5 million.

Many stakeholders suggested there were some significant changes to revenue sources over the past five years. Most notably, the need to find revenue sources **without increasing the price of tickets** (Section 2.1.4) was a common challenge. In some cases, sponsorship has become more critical, while in others, companies were seeking methods to increase 'hidden fees' (e.g., service fees) for their events without raising the face value ticket price. Targeted fundraising and crowdfunding was also noted as key means of increasing revenues.

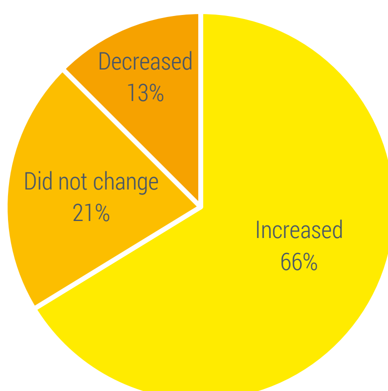
We used to not have to export our talent as much, but now the financial barriers to booking locally are so much higher. You used to be able to throw a show for almost nothing. Now the stakes are so high, people are gun-shy.

Stakeholder interviewee

Another key theme emerged around the importance of **revenue from outside of BC**. Bringing talented artists from outside the province was critical to many live music company's business models. Festivals noted that they relied heavily on international acts and out of province festival attendees to sustain their models. For example, 16% of attendees at the Vancouver International Jazz Festival came from outside of the city, staying for an average of 4 days and spending nearly $1200 while in Vancouver.[14] It was also noted, however, that it can be difficult to attract talent to BC if artists are not already planning a substantial west coast tour.

Despite changes in business models and associated revenue streams, more than 70% of survey respondents (Figure 13) indicated an increase in revenues over the past fiscal year.

Figure 13: Change in revenue over last year reported by BC live music companies (% of respondents)



n = 79
Source: 2018 BC Live Music Survey – Nordicity

Revenues for BC's live music industry are trending upwards. Companies are diversifying their revenue sources due to the squeeze resulting from the inability to raise ticket prices.

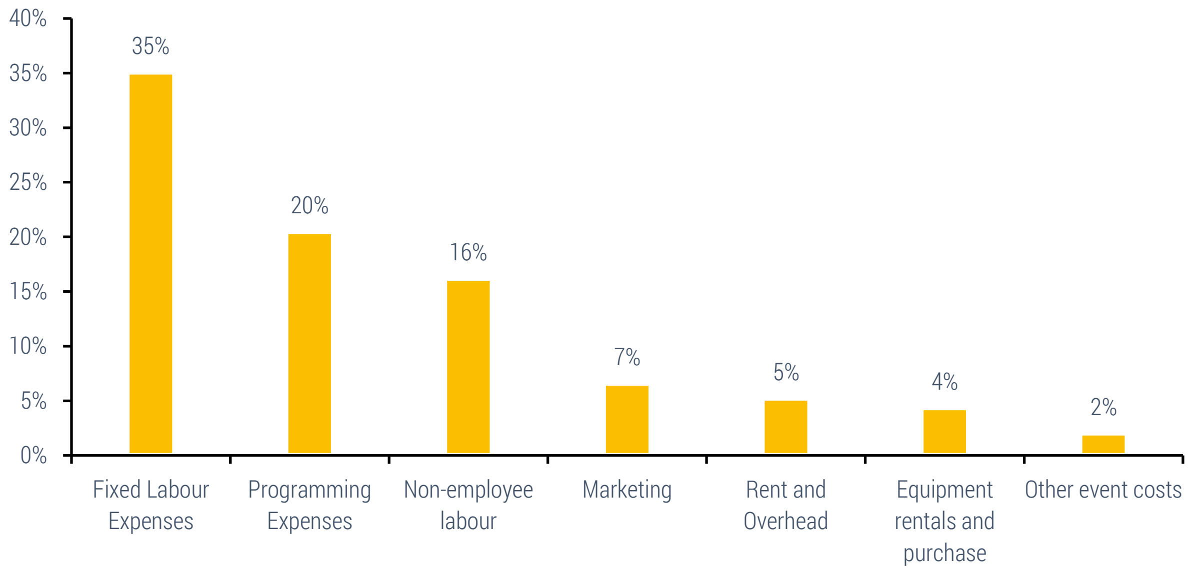
[14] Nordicity study on the Economic Impact of the Vancouver International Jazz Festival (2015).

2.2.2 EXPENSES

Companies indicated that their total expenditure has increased in the last few years, generally in pace with revenue. As a result, the **overall margins for the sector is -0.8%**. Some responding live music companies may not have reported public funding (e.g., grants) as revenue generated. As such, those companies would maintain greater operating surpluses (or smaller deficits) than represented in this study.

A categorical breakdown of expenditure is shown in Figure 14, below. It reveals that more than 70% of expenses go to labour and programming. Of the remaining 30%, marketing and rent/overhead are the biggest costs for live music companies. Additionally, companies reported on the portion of their expenditures that went to BC labour (51%) and BC programming costs (20%).

Figure 14: Expenditure breakdown of BC live music companies



Source: 2018 BC Live Music Survey – Nordicity and Nordicity modelling

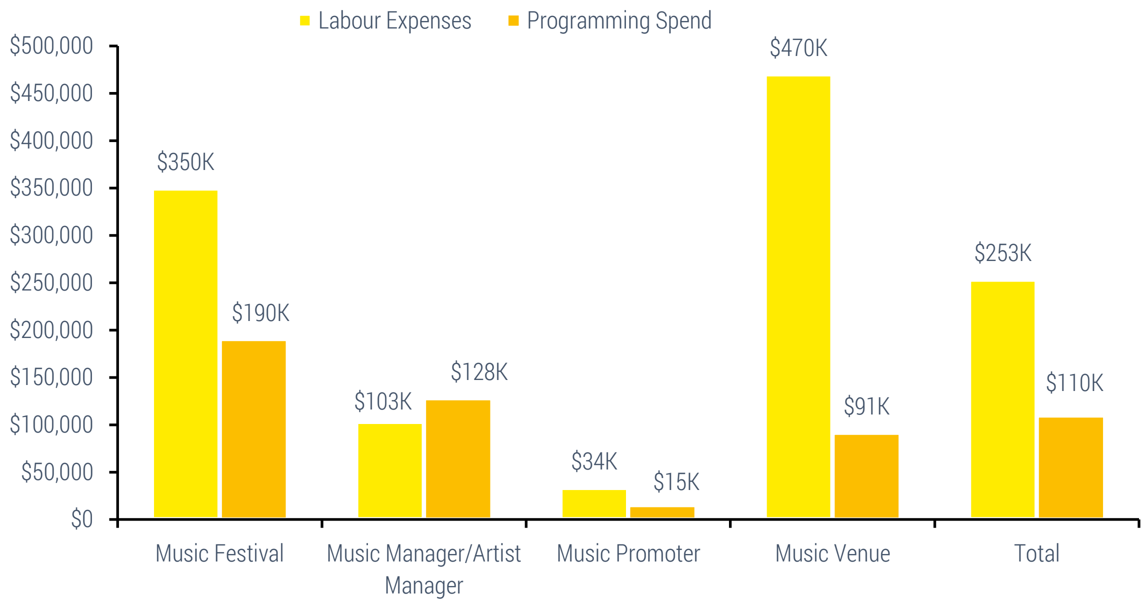
Dear Rouge
Photo credit: Allison Spargo

In terms of overhead costs, companies reported rising rent and property taxes in the stakeholder interviews. Rent and other overheads constitute 5% of their total expenditure. With aging cultural venues, companies can also expect to spend more on facility maintenance, for which they currently spend around 1% of their total expenditure. Stakeholders also indicated that artist fees have increased, with programming expenses currently making up 20% of total company expenditure. This is due, in part, to the value of Canadian currency as it was noted that most international artists needed to be paid in US dollars. As such, fluctuations in the value of the Canadian dollar can have a significant effect on expenses for live music companies around the province.

In terms of other types of expenses on the rise, venues and festivals noted it was becoming costlier to ensure safe and secure events. Also, while labour spending currently makes up 35% of companies' total expenditure, the skill shortage described by many stakeholders (Section 2.2.3) is likely to lead to increased labour spending in the near future.

Per Figure 15, venues and festivals are spending considerably more on labour than on programming, while expenses across the board are fairly equal in the case of managers and promoters.

Figure 15: Average labour and programming expenditure of BC live music companies



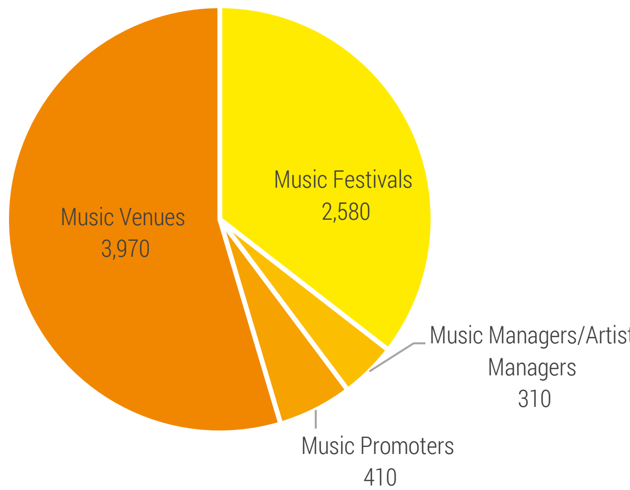
n = 70
Source: 2018 BC Live Music Survey – Nordicity

In conclusion, expenses are rising along with revenues for live music companies in BC, although at variable rates.

2.2.3 Labour

The live music sector is increasingly an important employer in BC. The sector created **nearly 7,000 full time equivalent (FTE)** positions in the province.

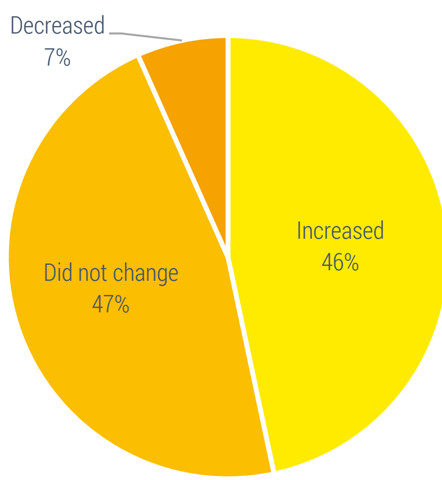
Figure 16: Total number of FTEs created in BC by the live music sector



Source: 2018 BC Live Music Survey – Nordicity and Nordicity modelling

As shown in Figure 17, only 7% of live music company respondents saw a decrease in the number of employees in their organization. Furthermore, a majority expect to see their headcount increase next year.

Figure 17: Change in headcount compared to last year reported by BC live music companies (% of respondents)

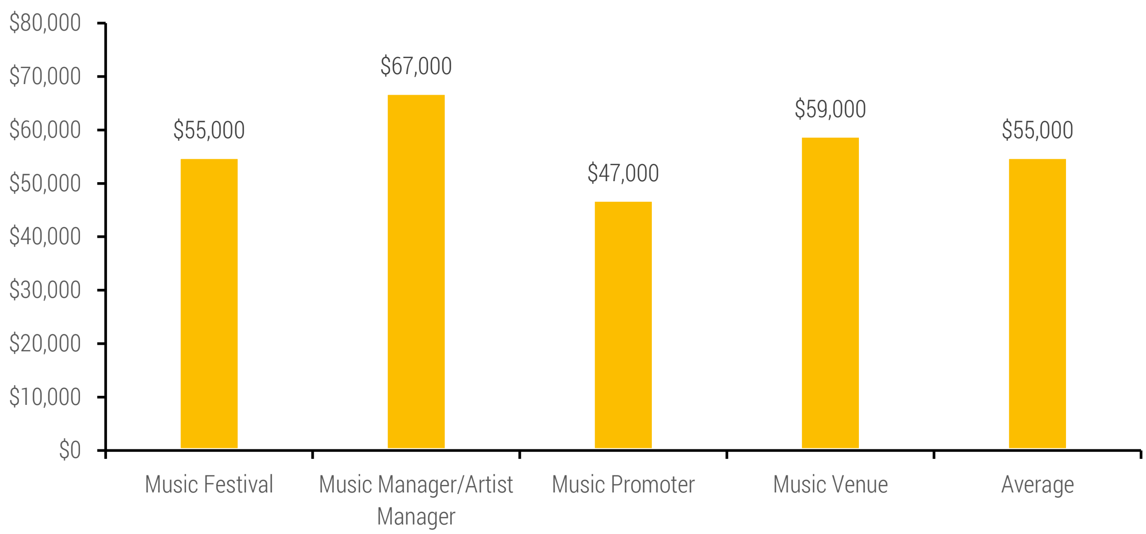


n = 74

Source: 2018 BC Live Music Survey – Nordicity

As seen in Figure 18, the average salary paid by live music companies is $55,000.

Figure 18: Average FTE salary at BC live music companies



n = 75
Source: 2018 BC Live Music Survey – Nordicity

For the most part, stakeholders thought the supply of labour was not a challenge to their operations. However, finding suitable employees with experience and specific knowledge of the **business side of the live music industry can be difficult**. Critical roles such as bookkeepers and administrators remain difficult to source for many live music companies in BC.

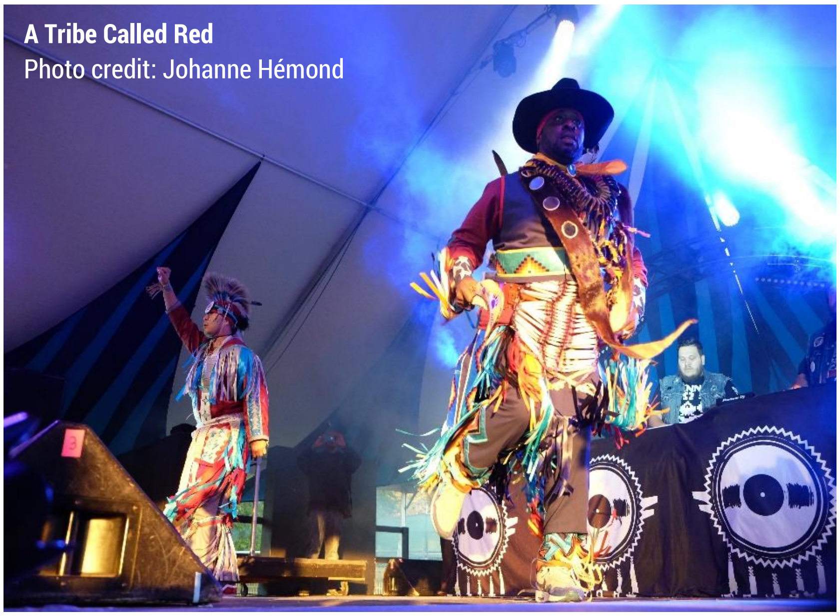
Additionally, talented employees with business development, marketing, fundraising, and/or sponsorship sourcing skills was a noted gap for live music companies generally. Many companies reported having to source sponsorship off the 'side of their desk', resulting in difficulties in finding the time to devote to sourcing sponsorship agreements. As sponsorship becomes a critical revenue source in the face of stagnated ticket prices and increasing operation costs (Section 2.2.2), the lack of skills to elicit sponsorship is a concern for many companies. As Karma Lacoff (Creative Okanagan, BreakOut West) notes, "**Marketing remains a huge challenge**. People simply don't know where to find out about live music, and only certain segments of the population are engaging. Many organizations are in need of marketing specialists to bridge these gaps."

It was recognized that the career development stream of Amplify BC will build the capacity of BC's music industry through knowledge transfer, skills development and the creation of new business opportunities. The new fund focus on career development and support for live music events and music companies, building on Creative BC's Industry Initiatives and Live Music streams.[15] Music BC also provides professional development support throughout the year and across the province through

[15] Interestingly, it was noted by Creative BC that the demand for training/professional development grants has been less than expected, which may point to a lack of awareness of the opportunities on offer.

its How-To Series, designed for emerging to mid-career professionals wishing to optimize business models for growth (e.g., PHEONIX Training & Professional Development Program).

The career development stream is positioned to be particularly helpful for self-managed artists who often struggle to both manage and promote themselves. As William A. Bogaardt of Songsearch Music International in Penticton observed, “There are lots of artists in the Okanagan who do not know how to market themselves, nor have knowledge relating to contract law. They are not able to protect themselves.” It was noted by many that it was too early to fully understand the effect that professional development grants in BC will have on the sector.


A Tribe Called Red
Photo credit: Johanne Hémond

There was a shared concern that many **young people do not know that it is possible to make a career** in the business of live music. As one stakeholder suggested, “You don’t have to be a studio rat or an artist to get work in the music industry”. Another remarked, “People should be able to graduate high school and know they can start a career at a music manager or promoter.” Relatedly, sufficient access to leadership and mentorship was cited as inadequate across the sector.

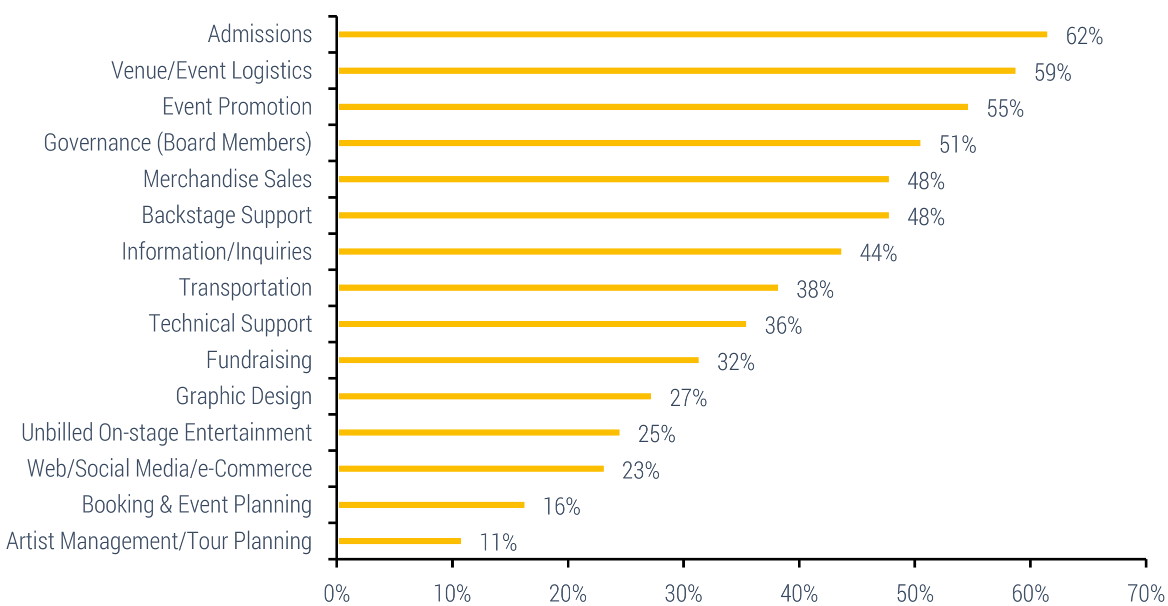
Other stakeholders suggested that sourcing **internships was difficult** as many students need to structure their work terms around post-secondary calendar dates that do not always coincide with the seasonality of live music. Additionally, the fluid nature of the sector can make it difficult for live music companies to meet some of the requirements for internship programs (e.g., minimum number of hours, consistent scheduling). Many expressed a strong desire for a streamlined process to hire interns or recent graduates who could fill key skills gaps. For example, an online ‘matchmaking’ database for live music companies and students trying to enter the sector was widely suggested.

It was noted that government support tends to focus on creation and artist support rather than **related business support** skills for organizational capacity. One respondent noted Australia as a leader in balancing support for the arts with ensuring available support to grow necessary business acumen. The Australia Arts Council's Career Development Grant and support from Australia's Live Music Office, for example, provide resources to artists wishing to build their business skills and develop sustainable careers.

> ***"We need to make it easier for young people to work in the industry. Young people need veterans to show them that it is a cool industry to work in and help guide them to where they should go."***
>
> ***Stakeholder interviewee***

Many companies are **leveraging volunteers** for their operations. 83% of companies reported using volunteers, with an annual average of 93 volunteers per company. This trend is likely a response to both the skills shortage and the rising levels of labour costs previously cited. As shown in Figure 19 below, volunteers are used for a wide range of activities, most notably in admissions (i.e. ticket-taking) (11%), event/venue logistics (10%) and event promotions (10%).

Figure 19: Activities performed by volunteers at BC live music companies (% of respondents)



n = 73
Source: 2018 BC Live Music Survey – Nordicity

Live music companies are increasingly important employers in the province. In conclusion, the following **key points** emerge regarding the **structure** of live music sector in BC:

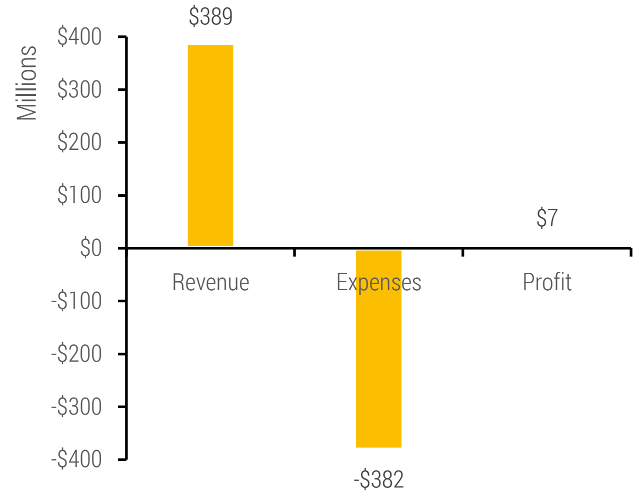
- The sector is comprised of both private companies and non-profit organizations
- There is growing activity outside of BC's key city centres.

- Increased spending to address safety and security, and the value of the Canadian dollar create financial challenges for the sector.
- The sector is growing and expects to hire in the near future.

2.3 VENUES

Leveraging sources such as BC Musician Magazine and the BC Touring Council (BCTC) Directory, Nordicity estimates that there are **more than 300 music venues** in BC.[16] Venues generated an average of nearly **$700,000** in revenues and created nearly **4,000 FTEs** in 2017. They paid an average salary of $59,000 – slightly higher than the sector average.

Figure 20: Total revenue, expenses and profit for BC live music venue companies ($M)



Source: 2018 BC Live Music Survey – Nordicity and Nordicity modelling

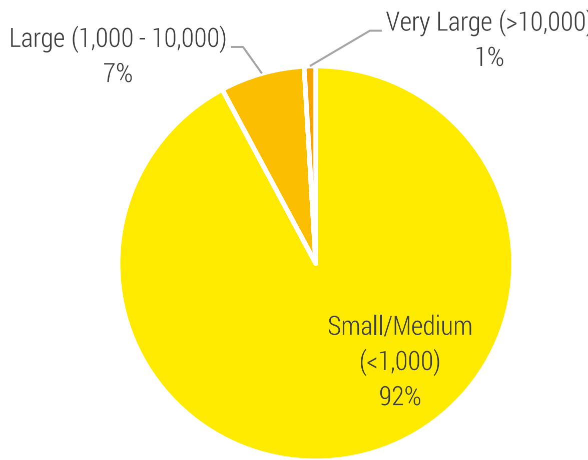
Figure 20 illustrates that venues generated a total of $389 million in revenue with $382 million in expenses, resulting in a **$7 million (2%) profit** in 2017.[17]

As seen in Figure 21, a significant majority of venues (92%) hold less than 1,000 people. However, there is a large group of venues that hold between 1,000 and 10,000 people. They can range from large music clubs (e.g., The Imperial, Rickshaw Theatre) to medium sized stadiums around the province (e.g., Encana Events Centre in Dawson Creek, the CN Centre in Prince George).

[16] Note, in order to keep universe estimates realistic, micro venues (e.g., small coffee shops) were not included in this number.

[17] It is important to note that the survey sample captured mostly larger music venues. As such, the financial data reported is more reflective of the medium to larger venues than smaller venues in BC.

Figure 21: Breakdown of BC live music venues by capacity (% of universe)



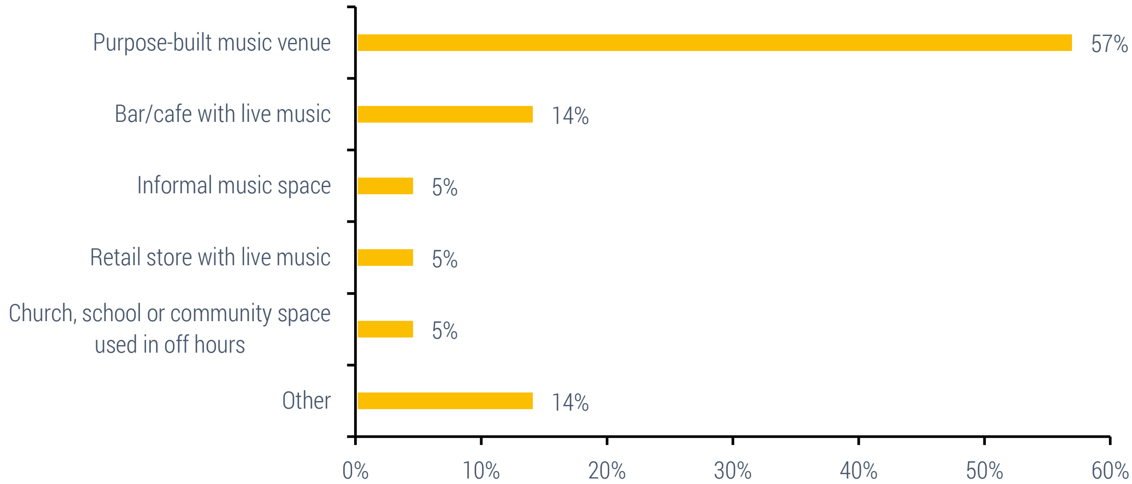
Source: Nordicity secondary research

As shown in Figure 22, the data reveals that nearly half of responding venues (43%) **were not purpose built** for performance, indicating the influence (economically and otherwise) that live music has on communities may not always be obvious.[18] The fact that live music is taking place in pop-up spaces and mixed-use facilities points to the industrious **'Do it Yourself' (DIY) nature of the industry.** Indeed, BC's emerging underground talent has long been supported through the DIY scene, where a close-bonded community has promoted itself through staging events from scratch and, often times, choosing a minimalistic approach to promotion and media.[19] The likes of promoters Vancouver Grotto and the venue 333, for example, aim to showcase talents of young DIY artists, build a sense of community, and sustain the city's lively underground scene. SBC Restaurant is another example of a multi-use event space that presents all-ages concerts in what happens to be BC's largest indoor skate ramp.

[18] Note, it is highly likely that the number of purpose-built music venues are overly represented in this survey sample. This is due to 'other' types of venues being less likely to respond to a survey about live music.

[19]Capilano Courier. (2018). "Inside Vancouver's underground music scene." http://www.capilanocourier.com/2018/01/16/vancouver-grotto-underground-music/.

Figure 22: Types of live music venues in BC (% of respondents)

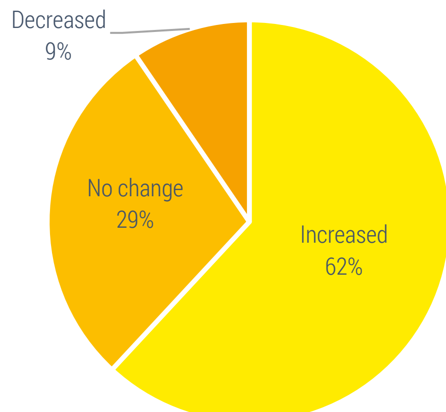


n = 21
Source: 2018 BC Live Music Survey – Nordicity

Additionally, many BC venues are aging, forcing owners to expend capital on renovations and maintenance. While some venues have been able to leverage heritage or infrastructure grants (e.g., Canada Cultural Spaces Fund) to help raise capital to maintain their venues. Some of the 'other' types of venues indicated through survey results include a converted movie theatre, a multidisciplinary arts centre, a laundromat and a city park bandshell.

Demand for live music in venues is on the rise in BC, with a strong majority (59%) reporting an increase in fill rate (i.e., the degree to which the venue is at capacity) over last year, as shown below.

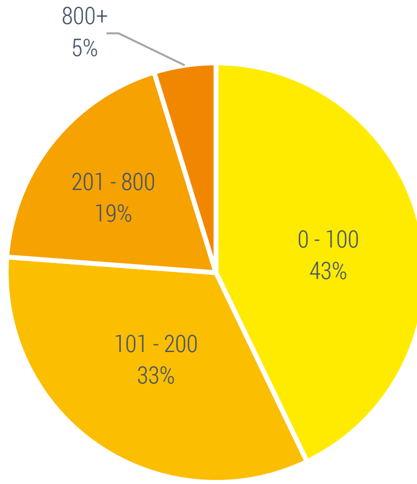
Figure 23: Change in fill rate compared to last year reported by BC live music venues (% of respondents)



n = 21
Source: 2018 BC Live Music Survey – Nordicity

As Figure 24 reveals, most venues (76%) reported booking 200 or fewer shows last year, whereas 5% of venues reported booking more than 800 shows.

Figure 24: Number of shows per year at BC live music venues (% of respondents)



n = 21
Source: 2018 BC Live Music Survey – Nordicity

Despite reporting some positive past and future growth numbers, venues are facing significant challenges around the province due to aggressive development, rising property prices, nuisance laws and the state of the wider music industry. First, intensified urban development has **caused expanded restrictions on live music venues**. As urban densification occurs close to areas with music venues, noise complaints increase drastically, especially for venues that share premises with residential space.

For example, in Vancouver, under Article 11 of City Bylaw 6555, extra requirements are put on potential venues to minimize potential complaints, in addition to more general noise restrictions under Article 12.[20] Such bylaws can create challenges for venues due to the onus being placed on the venue to take necessary steps to minimize disturbance to neighbours (e.g., changing hours, sound-proofing, monitoring how patrons enter/exit). As one respondent highlighted, other music-friendly jurisdictions (e.g., Brixton, London) place onus on developers and/or real estate agents to notify new tenants of nearby music venues. As a potential solution, one stakeholder suggested zoning an area close to downtown Vancouver **exempt from noise bylaws** (e.g., Hogan's Alley).

In other jurisdictions such as San Francisco, London (UK) and Victoria (Australia), this challenge has been increasingly addressed through the **'agent of change'** planning principle, where, a developer may be required to include noise attenuation measures when a proposed residential development is within a certain vicinity of an existing live music performance venue. The triggering of this principle has the potential to bring unprecedented planning reform for live music, and it is beginning to enter conversations in Canadian cities. In Toronto, for example, while various measures are under

[20] City of Vancouver Bylaw 6555. http://former.vancouver.ca/bylaws/6555c.PDF.

consideration and review, the City's Film & Entertainment Industries' Music Unit can now add comments to applications circulated by the Planning Division for any new development within 120 metres of an existing live music venue. This way, staff can proactively identify any potential conflicts and suggest appropriate recommendations.[21]

Additionally, details contained within bylaws (e.g., City of Vancouver Bylaw 6555) can make activities such as **temporary shows and outdoor events difficult to host**. It was also noted that these bylaws are created around a 'permanent' structure concept, thereby making use of temporary spaces difficult. Many respondents believed that increasing the number of temporary or special event permits would go a long way in supporting live music. Increased programming via pop-up concerts and live music outdoors create, in turn, more gig opportunities for artists, technical staff and live music businesses.

Adding to the challenges is a lack of coordination between venue actors. As Joanna Maratta of the BC Touring Council explains the disconnect, "Venues and presenters in our multi-disciplinary touring network are booking shows in their presenting seasons, 12 to 24 months in advance. Many artists working with promoters and touring on the industry side including bars, nightclubs and self-booking house concerts are looking for bookings within six months. This disconnect between the two markets is tough. We should spend some money getting various markets together to discuss how to make it work better for artists and be more strategic as a sector."

"Access to venues is our biggest challenge - there is more activity than the current live music infrastructure of the province can support."

Stakeholder interviewee

While the 'venue crisis' is widely known as a Vancouver story, the **demand for space continues to rise** in other cities around the provinces as well. The effect on venues is being particularly felt in those urban centre which share similar bylaw **restrictions**. For example, Kelowna's Riley's, a 'bastion' of live music, was forced to shut its doors in April 2018 due to rising overheads[22], alongside Streaming Café shortly after it was honoured for being one of the top 50 small music venues in the country.[23]

Difficulties in developing **sustainable all-ages events** were also cited by stakeholders. The gap was generally cited as a venue issue because most music events are confined to indoor, liquor primary venues (e.g., bars or clubs) and night-time programming.

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[21] Music Canada. (2018). https://musiccanada.com/news/new-research-from-socan-provides-more-evidence-for-the-value-of-music-cities-strategies/.

[22] Okanagan Edge. (2018). "Bastion of live music closes" https://okanaganedge.net/2018/04/10/bastion-live-music-closes/.

[23] Kelowna Now. (2016). "Say Farewell to Kelowna's Streaming Café" https://www.kelownanow.com/watercooler/news/news/Kelowna/16/04/29/Say_farewell_to_Kelowna_s_Streaming_Cafe/.

On the contrary, it remains important to note that some **rural** stakeholders noted an **increasing supply of venues** in their jurisdictions – through new venues being built but, more commonly, through an increase in restaurants or bars offering live music. As Julie Fowler of Artswells in Wells confirms, “The lack of venue space is an interesting one because, in the north, we actually have had a growth of venues space, with dedicated promoters.”

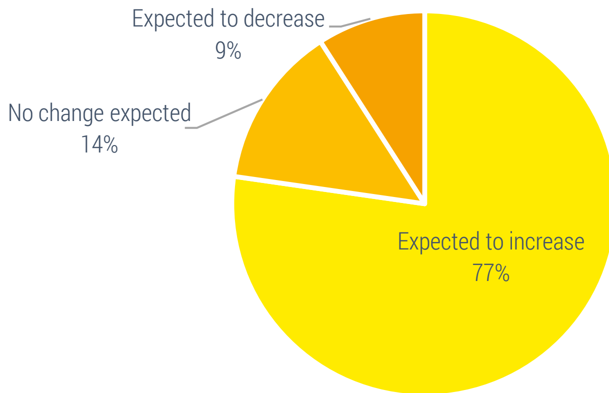
The Hillbilly Boppers
Photo credit: Babis Roussinos

The **unpredictable plight of venues** has adverse effects on long-term planning for artists, promoters and managers. While many venues are continuously closing or changing hands, many dedicated venues in the province are facing the wear and tear of aging facilities. As operating budgets become increasingly tight (or negative), venues are challenged to find the necessary capital for large scale upgrades.

On a positive note, the venue concern has been recognized in the ongoing development of Vancouver’s Music Strategy, with Councillor Heather Deal “dreaming of a city where people come around every corner and find music.”[24] Indeed, sentiment remains positive among venue operators. As depicted below, a significant majority (76%) of venues are optimistic that their fill rate will increase next year.

[24] CBC. (2017). “Creative City Music Strategy.” http://www.cbc.ca/news/canada/british-columbia/creative-city-music-strategy-1.4591402.

Figure 25: Change in fill rate expected next year by BC live music venues (% of respondents)



n = 21
Source: 2018 BC Live Music Survey – Nordicity

The table below summarizes the key findings regarding live music venues in BC.

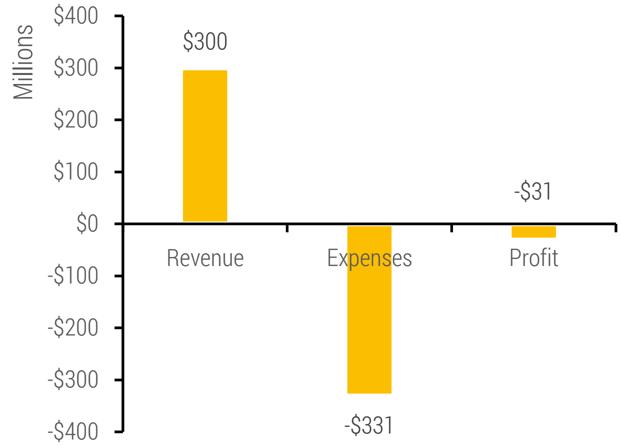
Strengths	Challenges
The supply of music venues is on the rise in rural areas.	The high cost of land in urban centres and municipal policies/bylaws (e.g., liquor, noise) have put significant pressure on live music venues.
The importance of live music venues is becoming more understood and prioritized by some public officials.	Venues are struggling to engage younger audiences via all-ages venues.

2.4 FESTIVALS

According to the annual music festival directory in BC Musician Magazine, there are **more than 400 festivals** in BC where music plays a primary role. These festivals generated an average annual revenue of **$700,000**. Festivals create more than **2,500 FTEs** and paid an average salary of $55,000 in 2017.

Figure 26 reveals that festivals generated a total of $300 million in revenue while expending more than $330 million to deliver programs in 2017. As such, festivals operated at a **loss of $31 million (10%)**.[25]

Figure 26: Total revenue, expenses and profit for BC music festival companies ($M)



Source: 2018 BC Live Music Survey – Nordicity and Nordicity modelling

Festivals have experienced a marked rise in popularity in BC due to several reasons. As live music touring becomes more critical to revenue generation for artists, the number of touring artists available for festivals continues to rise. Contrary to the struggles of many venues, it was also noted that festivals are having more success in finding sufficient sponsorship, often due to the number of *measurable* views that festivals are able to **provide as a return to sponsors.**

Speaking to audience demand, festivals offer a broad range of experiences. As indicated in Section 5.2, festivals have found innovative ways to include multiple artistic practices, offering **unique experiences** to attendees with programming themes extending into the likes of gastronomy (e.g., Skookum Festival) and heritage (e.g., Artswells' work with Barkerville). As an example of the **increased demand,** BC's biggest 2-day music festival set within city limits, Fvded in the Park (Surrey), hosts over 40,000 people over two days – a estimated 54% increase since the inaugural year's attendance.

Many festivals have also been able to generate a strong all-ages following. **Young people are attracted to the economic advantage** of seeing multiple acts for a fixed fee, rather than traditional single act concerts. A recent Canadian survey revealed that 48% of millennials attend music festivals, compared to 41% of the general population.[26] As one stakeholder described, "Youth often save up all year for one or two festivals that they know will cover almost all of their favourite acts, as opposed to

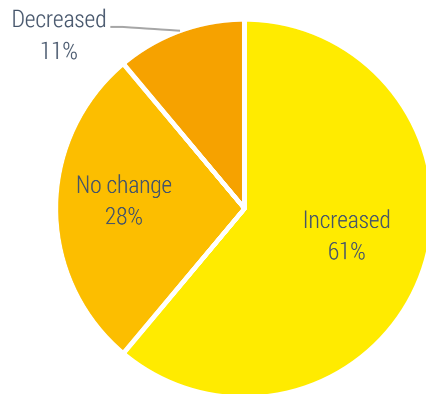
[25] While festival attendance and sponsorship investment is indeed on the rise, such estimated loss (based on a limited sample size) reflects the historically risky nature of BC's festival economy.

[26] Nielsen (2017) "Music 360 Canada Report". http://www.nielsen.com/content/dam/corporate/us/en/reports-downloads/2017-reports/music-360-canada-report-2017.pdf.

engaging with the live music scene year-round." Additionally, festivals offer the chance to form face to face connections and experiences that are becoming increasingly rare for young people.

Indicating the rise in popularity, Figure 27 illustrates festival attendance increases since last year.

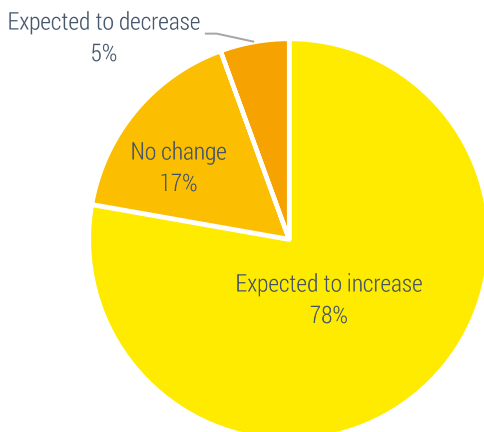
Figure 27: Change in the number of festival attendees from last year reported by BC music festivals (% of respondents)



n = 18
Source: 2018 BC Live Music Survey – Nordicity

Festival operators are expecting to see the popularity of music festivals continue to rise in the next year, with 78% expecting an increase in attendance, as illustrated below.

Figure 28: Change expected by BC music festivals in festival attendees next year (% of respondents)



n = 18
Source: 2018 BC Live Music Survey – Nordicity

The rising popularity of festivals around the province, however, does not come without challenges. A common concern amongst industry stakeholders was regarding the support of opportunities at BC's festivals for local artists. Stakeholders believed that some festivals, especially the larger commercial ones, were **favouring international talent** over local or emerging artists.

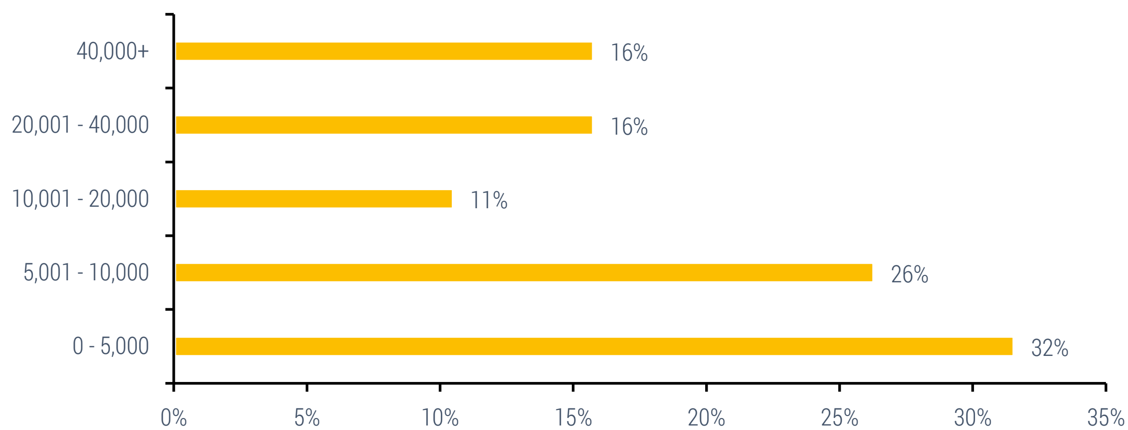
For the festival operators, international talent is helpful because it garners larger audiences (especially amongst youth and tourists) and, in turn, attracts increased **sponsorship** contributions.

The result of this trend, however, can be a market saturated with buyers. Festival promoters reportedly find themselves trying to outbid each other (often in American dollars) for the talent which captures the biggest draw. Moreover, many of these international acts remain bound to radius clauses,[27] which places further limits on the potential for festivals to share headline acts.

The rapid increase in festival demand leads to additional concerns about their financial sustainability. With reliance on a few big-name sponsors – often tied to sourcing big-name acts – the business model can be **vulnerable to external shock** if a key act or sponsor withdraws support. The now cancelled Squamish Valley Music Festival is often pointed to as an example of a perfect storm of challenges: the exchange rate, the fight for talent in the context of the Pacific Northwest's 'festival bubble', and expensive land/site logistics. Finally, the **environmental damage** following a large festival provided additional cause for concern amongst survey respondents.

Included in the provincial festival economy is a wide array of festival sizes. As illustrated in Figure 29, the majority (58%) of festivals indicated having fewer than 10,000 attendees, with only 16% hosting more than 40,000 guests.

Figure 29: Breakdown of BC music festivals by number of attendees (% of respondents)

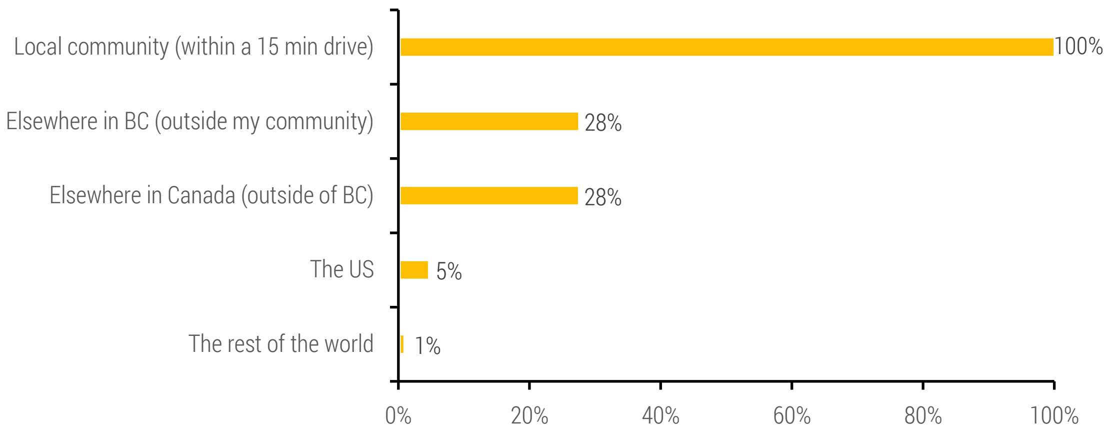


n = 19
Source: 2018 BC Live Music Survey – Nordicity

As indicated below, more than 60% of attendees come from outside of their local community. As such, they create an important tourism impact on the economy, discussed in further detail in Section 4.

[27] Radius clauses are non-compete clauses used in the live music industry, where a promoter may stipulate that a performer, for a certain length of time prior to or following an appearance at a concert or festival, must not hold concerts at other locations within a certain radius of the city where they are to perform.

Figure 30: Jurisdictions where BC music festivals market their events (% of respondents)



n = 17
Source: 2018 BC Live Music Survey – Nordicity

The table below provides a summary of key strengths and challenges for festivals in BC.

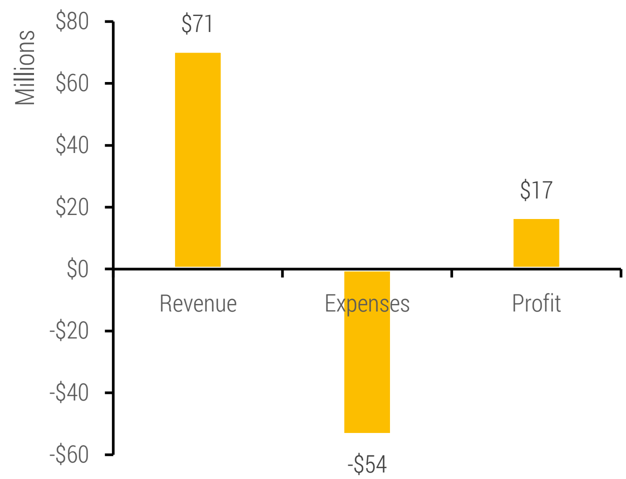
Strengths	Challenges
Popularity and demand for festivals has risen sharply and is expected to continue.	Rapid growth of festivals can make it difficult to remain financially and environmentally sustainable.
Festivals are offering unique experiences and good 'value' by featuring multiple artists on a single ticket.	Competing for big name talent is critical to festivals' business models, which can have the (often unintended) consequence of pushing out local/emerging acts.

2.5 PROMOTERS

Creative BC estimates there are more than **130 promoters** in the province with an average annual revenue of just under **$250,000** in 2017**.** Promoters paid out an average of $47,000 in salaries, $10,000 less than the average for live music companies.

While promoters are generating less revenue than other types of live music types, Figure 31 reveals that they are generally much more profitable. In total, promoters generated $71 million in revenue, with only $54 million in expenses, resulting **in a profit of $17 million (24%).** The high rate of profitability for promoters may be due to the minimal overhead that promoters take on in relation to other types of live music companies.

Figure 31: Total revenue, expenses and profit for BC live music promoter companies



Source: 2018 BC Live Music Survey – Nordicity and Nordicity modelling

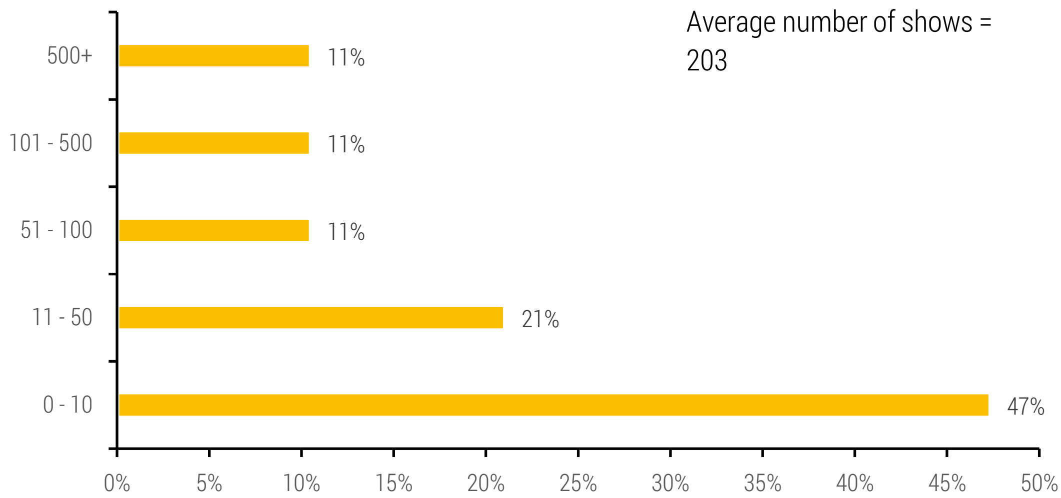
As shown in Figure 32 below, half of the promoters in the survey are booking less than 10 shows per year. A notable trend is that venue-promoter relations are largely based on the capacity and artist draw. While many of the **smaller promoters are servicing grassroots venues** around the province, it was noted that the **bigger name promoters' primary focus is on large, commercial venues.** As Heather Redfern of The Cultch explains, "It can be difficult to get the attention of the bigger promoters anymore. The ones we know have gotten so massive, they are now much more focused on the bigger venues and festivals."

Atomique Productions: Closing gender gaps in live music lineups

Atomique is one of Victoria's leading independent concert and events promotions company, producing an average of 100+ concerts, festivals and events each year. Atomique is dedicated to developing Vancouver Island's arts culture. In the tenth year of their Rifflandia festival, it focused on closing the gender gap and developed a lineup that was 50% female (either female-led or included a female in the band).

Atomique also produces festivals such as Rifflandia, Rock the Shores, and The Phillips Backyard Weekender and events such as the Spirit of 150 Victoria (2017), Victoria Celebrates Canada Day (2016) and BreakOut West Festival (2015) among others.

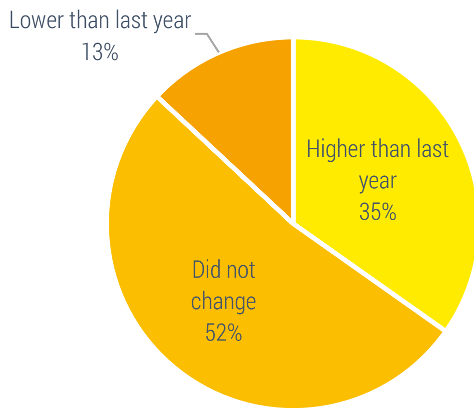
Figure 32: Number of shows in BC booked last year by BC live music promoters (% of respondents)



n = 19
Source: 2018 BC Live Music Survey – Nordicity

In terms of booking shows, 52% of promoters reported no change in the number of shows booked over the past year, as seen in Figure 33. However, despite less growth over the past year, promoters generated greater profit when compared to other live music companies.

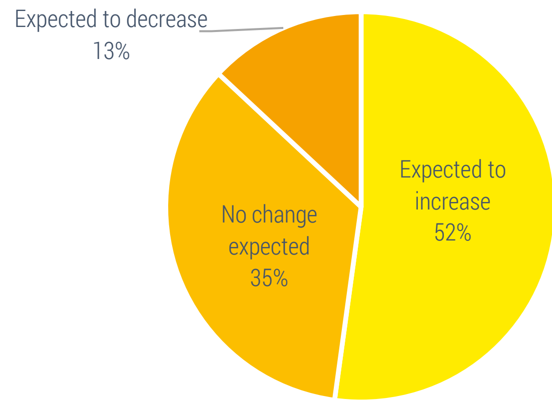
Figure 33: Change in number of shows booked by BC live music promoters (% of respondents)



n = 23
Source: 2018 BC Live Music Survey – Nordicity

Pointing to further optimism about growth in the live music sector, slightly more than half of promoter respondents (52%) expect to see an increase in the number of shows booked, as seen below.

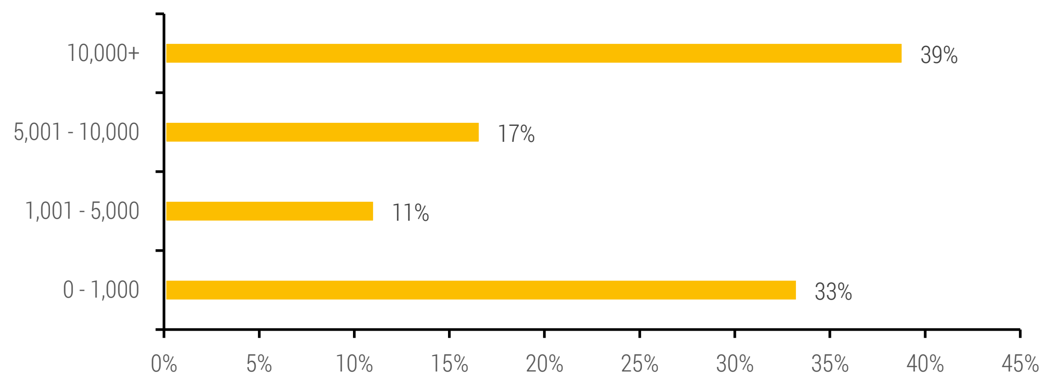
Figure 34: Change expected next year by BC live music promoters in number of shows booked (% of respondents)



n = 23
Source: 2018 BC Live Music Survey – Nordicity

As shown below, almost 40% of promoters reported a combined annual attendance of more than 10,000 people. On the contrary, almost as many companies (33%) reported attendance less than 1,000 people, annually.

Figure 35: Number of attendees at shows booked by BC live music promoters (% of respondents)



n = 18
Source: 2018 BC Live Music Survey – Nordicity

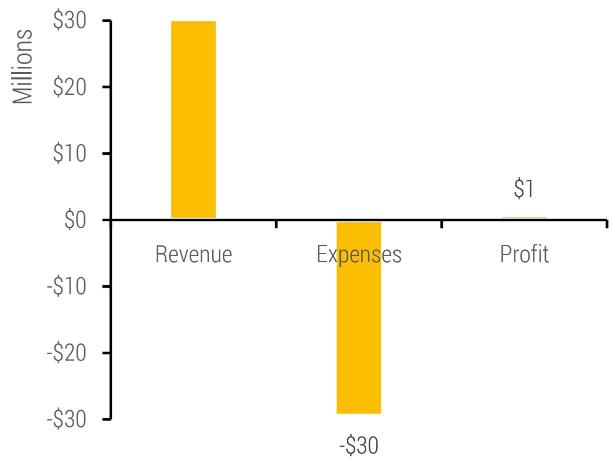
The table below provides a summary of key strengths and challenges for BC live music promoters.

Strengths	Challenges
BC promoters are primarily booking large shows.	Some promoters have grown too large to effectively service smaller venues and/or grassroots music companies.
Promoters are expecting growth in the number of shows booked next year.	A majority of promoters did not see growth in the number of shows booked last year.

2.6 MANAGERS

Creative BC estimates there are nearly **50 music or artist management companies** in BC.[28] Management companies reported an average annual **revenue of roughly $325,000**. Survey results revealed that the average music management company manages approximately seven artists. Managers pay the highest salary of all live music company types ($67,000 and create more than **300 FTEs**.

Figure 36: Total revenue, expenses and profit for BC music management/artist management companies ($M)



Source: 2018 BC Live Music Survey – Nordicity and Nordicity modelling

As indicated in Figure 36, managers create a **small profit** by generating over $30 million in total revenue, while expending just less than that amount.

Adding to the fact that the industry is largely owned (Figure 10) and hires (94%) from within BC, the survey revealed that almost **90% of the artists managed by BC companies are local to BC**. On average, companies were currently managing three tours that had at least one stop in BC. This number may indicate that many BC live music companies are also working outside the province.

Management companies were especially concerned about the **shortage of labour** with particular skills suited for the live music business. To make matters worse, multiple management companies revealed that it was **difficult to retain the talent they have**. Companies complained about often having to invest in training inexperienced staff, only to have them poached by larger music management companies, generally in places with more affordable living costs. Management companies agreed that there would be immense benefit given more local graduates with adequate live music business acumen.

[28] For the purpose of this study, managers are defined as those who manage the finances of artists, including their tours. While the scope of this definition initially included self-managed artists, survey response rates from this cohort were too low to draw significant conclusions. Additionally, no reputable count of the number of self-managed artists in the province was available.

Of critical importance to respondents in an increasingly expensive province was getting artists booked in venues of a certain size in order to make **operations financially sustainable**. As one stakeholder pointed out, "There has been a gradual downward slope in live performance opportunities in Vancouver. As such, if you are not in a 1500 seat venue, you are in trouble." However, venues of this size are in high demand which has increased competition between managers trying to book their artists in larger venues.

As indicated in Section 2.1.2, managers, in addition to promoters, have been more successful in their use of digital technology than other types of live music organization. They are using **technology to promote their artists and find new talent** (see related breakout box).

Nettwerk Music Group: A leader in digital music management

Nettwerk is an influential independent label, artist management and publishing company with a client list that includes Coldplay, Sarah McLachlan, Dido and Barenaked Ladies. The company started in Vancouver in 1984, the company embraced new digital formats and the label became one of the first to sell MP3s free of DRM (Digital Rights Management). The company is built on a foundation as a social media marketer and emerged as a leader in the internet-enabled social media environment.

Source: https://www.hbs.edu/faculty/Pages/item.aspx?num=38112

The table below summarizes key strengths and challenges for music management companies in BC.

Strengths	Challenges
Management companies are leveraging digital tools to improve operations.	BC music managers are struggling to find labour with appropriate business skills for the live music industry.
The majority of BC managers are managing artists local to BC.	Managers are competing for a limited number of venues that are large enough to offer fees required to sustain their business models.

2.7 SECTOR SUMMARY

The profile described above illustrates a robust and growing live music sector. Despite some notable challenges, the sector remains optimistic about the future and continues to leverage various strengths. The key findings of the sector profile are tabulated below.

Table 1: Summary of key findings

Themes	Strengths	Challenges
Sense of community	There is a growing enthusiasm and optimism about the future of BC's live music sector.	There has not yet been a coordinated approach to 'prove' the value of the industry to external audiences.
	The music community is increasingly supportive of each other.	The sector, internally, is still catching up from its relatively disjointed past.
Technology	Live music companies are leveraging the breadth of data available to make informed business decisions.	Streaming technology has led to dwindling music revenues, and new ephemeral social media tools (e.g., Snapchat, Instagram 'Stories') are reducing online material for audience engagement.
	There is growing use of digital tools (e.g., social media), as well as targeted marketing and crowdfunding to promote, fundraise and engage audiences.	Many artists are not keeping up with the digital age, making it difficult for promoters/venues to promote or plan for acts.
Geography	The province's natural beauty is an important attraction for artists and employees alike.	BC's relative isolation and vast geography can make the cost of touring a critical barrier.
	The province is increasingly a fixture on west coast tour circuits, with bands wishing to leverage its proximity to US hubs such as Seattle, Portland and LA.	There are a lack of structures and support systems for collaborating with other Canadian cities (and providers) in booking artists in BC.

Themes	Strengths	Challenges
Affordability	Some live music companies have taken a leadership role in providing 'living wages'.	Live music companies are seeing increased operational and labour costs in tandem with rising property taxes.
		Potential audiences have minimal disposable income, making it difficult for venues and festivals to raise ticket prices.
Public Support	Governments, at the provincial and local (city) levels, have begun to recognize the positive impacts generated by live music (e.g., Amplify BC, Vancouver and Victoria's music strategies)	Many bylaws and regulations in BC are still impeding the development of a vibrant live music sector, often at the city level.
		Many live music companies are struggling to sustain business models without ongoing operational grants.
Partnerships	Expectations on live event experiences are driving increased collaborations between live music companies and audio-visual partners.	The value of live music is often understated, resulting in difficulties in creating meaningful external partnerships.
	Technology is enabling targeted marketing and other fundraising opportunities for the live music sector.	Sourcing sponsors can be difficult, especially for small venues.
Venues	The supply of music venues is on the rise in rural areas.	The high cost of land in urban centres and municipal policies/bylaws (e.g., liquor, noise) have put significant pressure on live music venues.
	The importance of live music venues is becoming more understood and prioritized by some public officials.	Venues are struggling to engage younger audiences via all-ages venues.

Themes	Strengths	Challenges
Festivals	Popularity and demand for festivals has risen sharply and is expected to continue.	Rapid growth of festivals can make it difficult to remain financially and environmentally sustainable.
	Festivals are offering unique experiences and good 'value' by featuring multiple artists on a single ticket.	Competing for big name talent is critical to festivals' business models, which can have the (often unintended) consequence of pushing out local/emerging acts.
Promoters	BC promoters are primarily booking large shows.	Some promoters have grown too large to effectively service smaller venues and/or grassroots music companies.
	Promoters are expecting growth in the number of shows booked next year.	A majority of promoters did not see growth in the number of shows booked last year.
Managers	Management companies are leveraging digital tools to improve operations.	BC music managers are struggling to find labour with appropriate business skills for the live music industry.
	The majority of BC managers are managing artists local to BC.	Managers are competing for a limited number of venues that are large enough to offer fees required to sustain their business models.

3. Economic Impact

The economic impact of the live music industry refers to the GDP, jobs and labour income generated by the expenditures of companies operating in BC's live music sector – or those companies that supply live music in British Columbia.

The economic impact assessment (EIA) was done using survey data from 90 live music companies who reported on their annual expenditures. Using the models created for Nordicity's *Live Music Measures Up* report, calculations were then made to estimate the split between fixed/employee labour and freelance/contract labour. Additionally, Nordicity's model was used to allocate non-labour and non-programming costs.[29] Once allocated, expenditures in each category were then entered into a bespoke module of Nordicity's proprietary tool, *MyEIA* (updated to reflect BC Input-Output tables).

The **direct economic impact** refers to the impact (in GDP, employment and labour income) created by the live music industry in British Columbia (typically via labour spending and the amassing of profits). In the fiscal year ending in 2017, the live music industry was *directly* responsible for 2,340 full time equivalents (FTEs), $403.5 million in labour income and $397.4 million in GDP.

The **indirect economic impact** refers to the increase in GDP and employment in the industries that supply inputs to the live music industry in BC, as a result of the industry's activities, such as lighting and equipment services. Nordicity estimates the indirect impact of the live music industry in 2017 contributed 3,060 FTEs of employment, $137.2 million in labour income and $243.6 million in GDP.

The **induced economic impact** is the additional economic activity associated with the re-spending of wages earned in the live music industry (i.e., the incremental household income) in the BC economy. In 2017, this effect contributed 1,550 FTEs, $78.7 million in labour income and $174.8 million in GDP to the BC economy.

The **total economic impact** of the supply of live music in BC is equal to the sum of the direct, indirect and induced economic impacts outlined above. It is summarized in the table below.

[29] To account for possible double counting of revenue/expenditures (e.g., in the case where a BC-based venue engages a BC-based promoter), Nordicity applied a 20-25% discount on programming costs when modelling the economic impact of live music in BC. However, a discount rate was not applied to managers as the they mostly engage with artists who are not included in this estimate.

Table 2: Economic impact of live music in BC (2017)

	Direct impact	Indirect impact	Induced impact	Total impact
Employment (FTEs)	2,340	3,060	1,550	**6,950**
Labour income ($M)	$403.5 M	$137.2 M	$78.7 M	**$619.3 M**
Gross domestic product ($M)	$397.4 M	$243.6 M	$174.8 M	**$815.8 M**

Source: Nordicity MyEIA Model based on data from survey and Statistics Canada
Note: Some totals may not sum due to rounding

The **fiscal impact** of supply of live music represents the total tax revenues generated resulting from the industry's economic activity. Like the economic impact, it consists of direct, indirect and induced portions. Nordicity estimates the total fiscal impact of the live music industry in 2017 was $207.3 million in tax revenues to all levels of government. These tax revenues comprised $140.7 million in personal income taxes, $12.6 million in corporation taxes, $45.5 million in consumption taxes and $8.5 million in local property taxes and other fees.

Provincially, the live music industry in BC contributed a total of $77.8 million in 2017. Of that amount, the Province received $37.2 million in personal income taxes, $4.4 million in corporation taxes, $27. 7 million in consumption taxes and $8.5 million in local property taxes and other fees to government.

Table 3: Fiscal impact of live music in BC (2017)

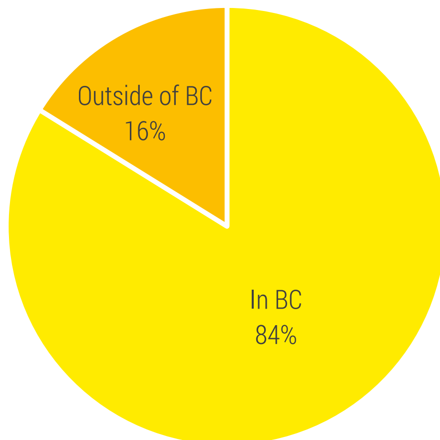
	Federal	Provincial	Total
Personal income taxes ($M)	$103.5 M	$37.2 M	**$140.7 M**
Corporation income taxes ($M)	$8.2 M	$4.4 M	**$12.6 M**
Consumption taxes ($M)	$17.8 M	$27.7 M	**$45.5 M**
Local property taxes and other fees **($M)**	$.0 M	$8.5 M	**$8.5 M**
Total taxes ($M)	**$129.5 M**	**$77.8 M**	**$207.3 M**

Source: Nordicity MyEIA Model based on data from survey and Statistics Canada
Note: Some totals may not sum due to rounding

4. Tourism Impact

Live music events in BC attract tourists from outside BC and outside Canada. BC-based festivals, for example, attracted a total of over 7.4 million attendees in 2017. Of those, approximately **750,000 attendees (just over 10%) were attracted to the festivals from outside of BC** (i.e., tourists). Similarly, as seen in Figure 37, 16% of all tickets sold by reporting promoters and venues for music shows in BC were bought by people from outside BC. The same data suggests than such tourists also tend to buy more expensive tickets, spending over $8.00 more per ticket than the average ticket buyer.

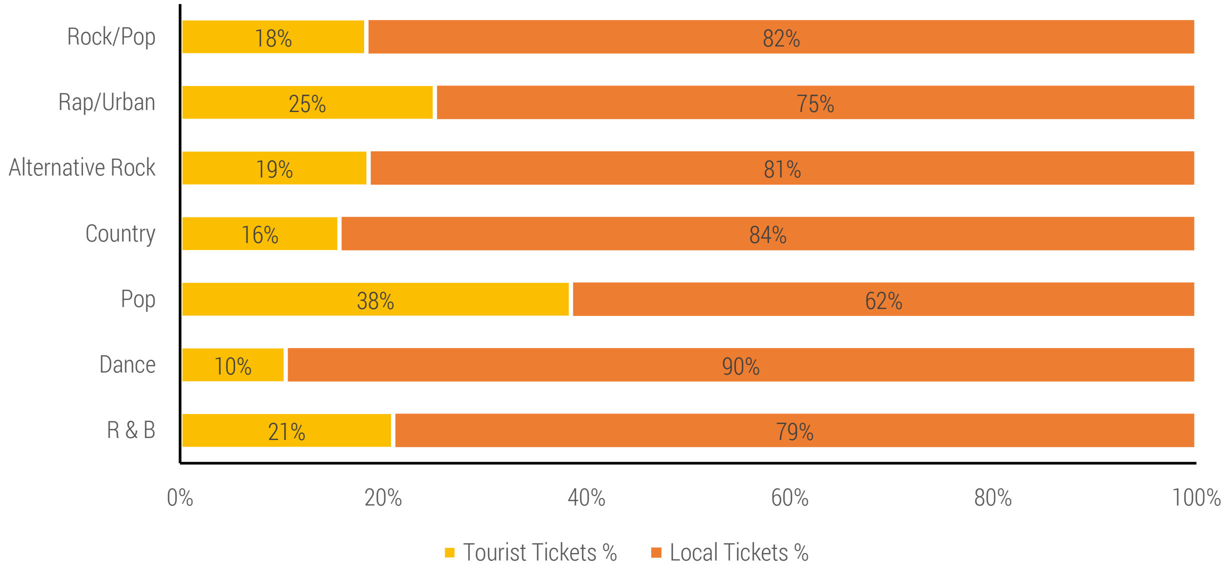
Figure 37: Breakdown of tickets sold for BC live music events by origin of attendance (% of tickets sold)



Source: Data supplied by BC-based venue operators and promoters

Tourists are likely to come to BC for shows of rock/pop, rap/urban or alternative rock genres. These genres make up almost 75% of tickets sold to tourists. Interestingly, almost 40% of tickets sold for pop shows were bought by tourists, as seen in Figure 38.

Figure 38: Tickets sold to tourists for music shows in BC by genre (% of tickets sold)



Source: Data supplied by BC-based venue operators and promoters

"Tourism agencies have largely not recognized the importance or value of live music (or arts and culture more generally) in British Columbia."

Stakeholder interviewee

Tourists are **most likely to attend shows at large venues** such as Rogers Arena and BC Place, which together account for about 40% of all tourists attending a venue-based music event.

Of the top ten shows in BC in terms of ticket sales, only two were shows by Canadian artists – Shania Twain and The Weeknd. Around 15% of the ticket sales for those shows were attributed to tourists. Bringing hugely popular international artists to BC is good for BC tourism demonstrated by recent concert revenues driven by Beyoncé and Jay-Z, the Eagles, Harry Styles and Kendrick Lamar. More than 30% of ticket sales for these shows came from tourists.

The economic impact of culture goes beyond cultural activity. **Visitors to live music events in BC also spend on food, accommodations and retail purchases**, which yield an additional economic impact for the BC economy. Tourists can have an even larger impact on the local economy through expenditures in the retail and hospitality sectors, which can be attributed to their attendance at live music events.

Historically, there has existed little integration between **between live music venues, artists and the tourism and hospitality sector** in BC. For example, BC's tourism agencies do not regularly highlight the live music sector within their destination marketing campaigns.[30] The City of Toronto, in partnership with Tourism Toronto, for example, is credited with branding the city not only as a music-festival destination but "one of the liveliest music and nightlife scenes in the world." Of particular note, is their approach to marketing that goes beyond the biggest touring acts and venues and includes "those little hole-in-the-wall bars with independent musicians [that] make for memorable experiences too".[31]

Developing growth in music-driven tourism requires **data-driven perception changes** to encourage the tourism sector to more effectively leverage live music events in the province and establish joint marketing platforms. Several stakeholders remarked that, once equipped with the evidence, there exists an appetite to develop stronger working relationships between BC's tourism and live music sectors. For example, the Vision for Ontario's Live Music Industry made multiple recommendations to build strategic partnerships between live music companies and tourism organizations for improved marketing and promotion and to increase information sharing.

Rifflandia
Photo credit: Brian Pridham

[30] Destination BC's go-to website 'Hello BC' cites only seven music, dance or theatre related activities in the province. https://www.hellobc.com/british-columbia/things-to-do/festivals-events.aspx.

[31] See Toronto Now. (2018). Music and Nightlife http://www.seetorontonow.com/music-nightlife.

5. Non-economic Impact

The social and community impacts of a vibrant music scene catalyze benefits far beyond the transactional economic activity that the industry generates (as discussed in Section 3). A growing body of literature supports the view that live music represents a form of critical infrastructure that supports and sustains an inclusive cultural environment within the cities in which they make their home. Driven by both primary and secondary research, this section explores the contribution of live music to the **social** and **cultural fabric** of British Columbia.

5.1 Social and Community Impact

Live music plays a vital role in the economic vibrancy of BC's communities, creating employment and attracting both residents and tourists into city centres. While its social and cultural relevancy has long been understood, little has been documented to this effect on a local or provincial scale. Rather, it is through the passionate appeal of live music stakeholders across BC that one can begin to understand the genuine importance of the sector as a cherished 'cultural space', as a critical home to risk-takers, innovators and place-makers, and as a launch-pad to realizing artists' dreams.

A robust live music sector is critical for **strengthening the social fabric** in its communities. As reflected in survey data, three of the top four identified 'assets' of BC's live music sector (i.e., variety of genres, sense of community, diversity of the scene) are indeed critical enablers of social cohesion (Figure 1).

Music is arguably the most democratic of all the art forms in that it touches on the lives of so many. Through its multitude of genres, live music experiences help to break down barriers between disparate communities, providing a common language and space.[32]

> ***"As our world becomes more disconnected, people are looking to connect with each other. This has resulted in a rise in festival culture. These shared experiences can help connect people. We have so few opportunities for this these days, and festivals are filling the void."***
>
> ***Julie Fowler, ED, Artswells Festival***

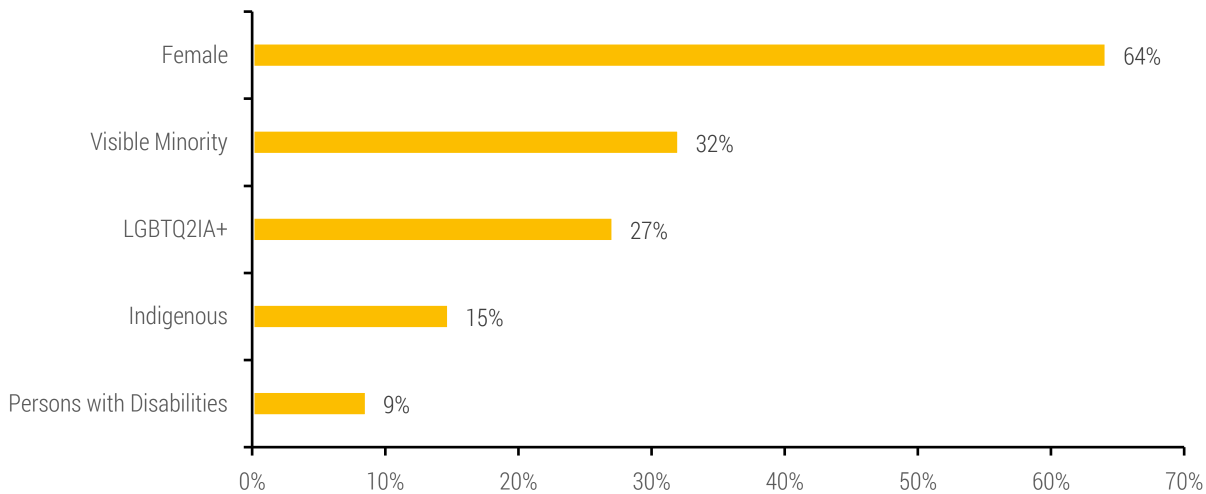
Music also provides a venue for **integration of newcomers and immigrants** and can support mental health and wellbeing, especially in already vulnerable segments of the population. A recent survey done by the Government of Victoria (Australia), for example, revealed that 84% of respondents stated

[32] Egermann, Hauke et al. "Music induces universal emotion-related psychophysiological responses: comparing Canadian listeners to Congolese Pygmies" (2015). https://www.frontiersin.org/articles/10.3389/fpsyg.2014.01341/full.

that live music venues are welcoming and safe environments, a critical perception for new audiences.[33]

A reflection of this inclusion is shown in Figure 39, below, which illustrates how BC's **live music companies are owned by a diverse range of stakeholders**. Not only do survey findings depict a socially inclusive and dynamic industry, but stakeholders also reported the perception that diverse music company ownership is helping to develop new avenues and driving demand for contemporary and traditional roots music (e.g., folk, world) in BC. To this end, many respondents believed that BC is becoming increasingly known for high-quality, **innovative fusion music**, bridging cultural influences from around the world**.**

Figure 39: Diversity of company ownership in the BC live music industry (% of respondents)

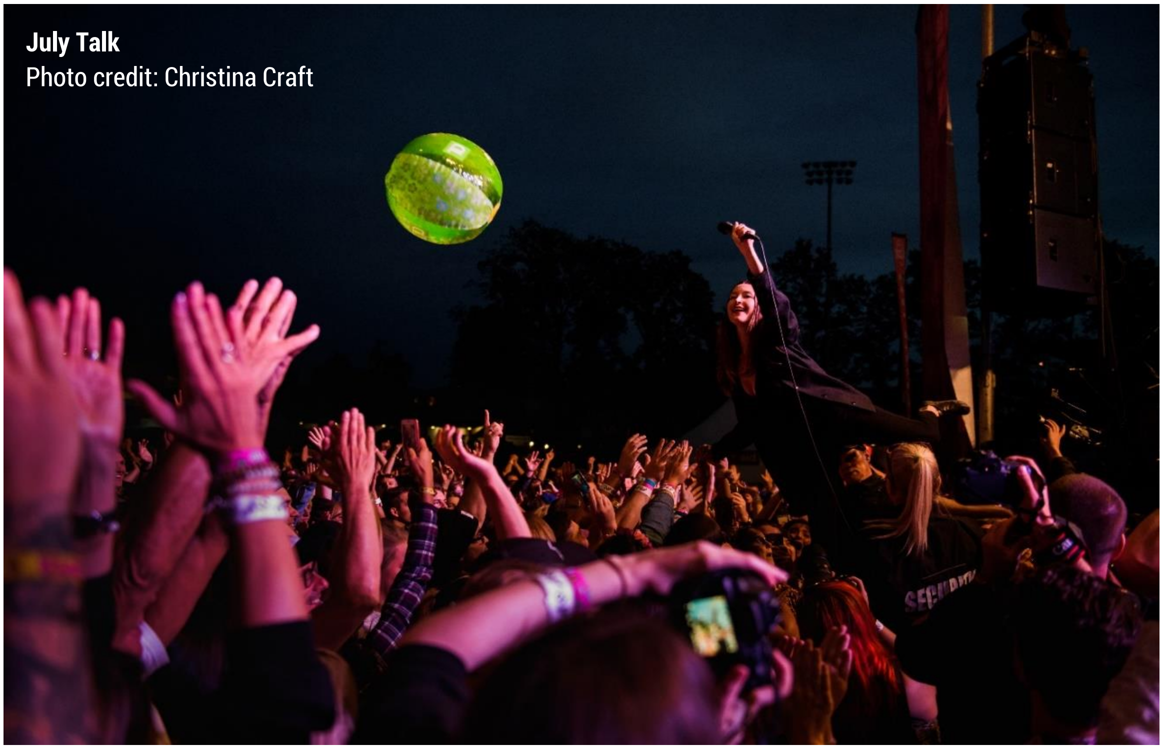


n = 81
Source: 2018 BC Live Music Survey – Nordicity

In addition to the diverse community of creators and owners in this sector, audiences were also noted for being open to a variety of genres and types of performances. As one interviewee put it, "You can throw any kind of show up here and people will show up to support it". BC's **diverse and open-minded audiences** have resulted in a positive provincial reputation for being a **great place to test new ideas**. This reputation was widely cited as one of the best aspects of working in BC's live music sector. However, several respondents mentioned that, while the diversity of live music experiences remains a key offer, there is much work to be done in terms of encouraging diverse audiences at such concerts.

[33] Creative Victoria. (2016). https://creative.vic.gov.au/__data/assets/pdf_file/0003/56694/The_economic_social_and_cultural_contribution_of_venue-based_live_music_in_Victoria-2.pdf.

Speaking again to Figure 39, a significant majority (64%) of BC live music companies have at least one female owner, indicative of the growing **influence of women in the global live music sector**. This is a positive sign for the industry as data that suggests gender inclusion provides high returns, not only socially, but economically as well. An MIT study found that an increase in gender-balanced workforces results in increased revenues by an estimated 41%.[34] Additionally, it has been noted that having at least three women in leadership positions provide a 42% increase in sales amongst Fortune 500 companies.[35] Nationally speaking, recently launched advocacy initiatives such as Across The Board are pursuing gender parity on the board of directors of organizations impacting the Canadian music industry.



July Talk
Photo credit: Christina Craft

Further reflecting a growth in female leadership in the BC sector, Women in Music Canada (WIM-C) has recently opened a western chapter for their operations in the province. As a first step, they are working closely with grassroots organizations such as Vancouver's Good Night Out (GNO), which is working to encourage a cultural shift in order to make Vancouver's nightlife a safe environment for everyone.

[34] Sara Ellison and Wallace Mullion (2014). "Diversity, Social Goods Provision and Performance in the Firm." https://economics.mit.edu/files/885.

[35] Anita Borg Institute. (2014). "The Case for Investing in Women." https://anitab.org/wp-content/uploads/2014/03/The-Case-for-Investing-in-Women-314.pdf.

Increased inclusion has become so central to the sector that it was cited by multiple stakeholders as causing **fundamental changes to business models,** indicating further potential social benefits in the wider community. For example, companies are considering the diverse communities that their companies serve and operate within and are seeking means to include and bring this diversity into key processes.

Music venues are important contributors to this story of social and cultural impact, as they add to the vibrancy and **livability of a city, community or province**, often becoming an integral part of their branding and identity. In fact, 67% of urban British Columbians believed that it is important to live in a neighborhood with a vibrant local arts scene that includes live music.[36] Recent examples of grassroot venue campaigns in key music cities around the world (e.g., Toronto, Austin, London) is largely built on the understanding that the survival of these institutions is critical for ensuring that: bands continue to emerge from the grassroots, communities continue to have space to gather and share their appreciation of music, and cities are well positioned to build strong brand identities with integral links to their live music scenes. Small venues in particular have also always played a fundamental role in breaking new bands and nurturing new audiences. As the UK's newly formed Music Venue Trust purports, "There is a 'passing of the baton' as subsequent generations of musicians and songwriters continued to be inspired by their musical heroes who once upon a time, also carried their own guitars in and out of grass roots music venues."[37]

[36] SOCAN (2017). "Live Music & Urban Canadians." http://www.socan.ca/files/pdf/SOCAN%20Live%20Music%20Research%202017%20-%20EN.pdf.

[37] HuffPost. (2016). "What route can music take without it's roots?" https://www.huffingtonpost.co.uk/tim-arnold/what-route-can-music-take_b_12287112.html.


Delhi to Dublin
Photo credit: Virinder Sangha, BeTrue Cineworks

5.2 Cultural Sector Impact

As indicated throughout the report, live music is increasingly becoming the necessary financial lifeblood for the wider music sector. For example, in 2000, the global live music sector made up only 33% of wider music industry revenues, compared to more than 43% in 2016.[38] In Canada, live music revenues are also on the rise, rising from less than $800 million in 2010 to an estimated $988 million in 2015.[39] The continuing existence of a vibrant live music sect or, despite challenges, underscores the resilience of live music as a form of cultural expression, and validates music as a **financially sustainable, respected and legitimate industry**. The sector's importance is becoming even more relevant as live music is increasingly the key driver for audience development and revenue generation.

A thriving, skilled and globally-minded local live music scene creates a dynamic business environment which can be an attractive feature for creative talent from around the world. The resulting pool of talent, in turn, supports a range of music businesses such as recording studios, music labels, distributors, artist managers, promoters and marketing agencies. Overall, a vibrant live music industry **provides the conditions that the broader music industry requires to thrive**. As noted in Section 2.2, the survey revealed that more than 80% of respondents indicated being involved in

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[38] Frost Online. (2018). "How does live music impact the music industry financially." https://frostonline.miami.edu/articles/live-music-financial-impact-on-music-industry.aspx.

[39] Statista. "Live music revenue in Canada from 2010 to 2015." https://www.statista.com/statistics/686785/live-music-revenue-in-canada/.

other music businesses. Most commonly, the live music sector in BC works with content creators such as graphic designers or designers for digital, social media and print advertising.

Ultimately, **validating live music as a respected and legitimate industry** has knock-on effects across the creative and cultural ecosystem through its capacity to attract and retain talent and investment. In other words, live music venues' clientele is an important market for many other businesses. This demographic includes active consumers of cultural experiences more broadly, which attracts investment in new businesses that provide cultural services.

Speaking to broader impacts, live music has the potential to be **an important enabler of growth in other cultural sectors**. While the data showed mixed results on the status of partnerships being created outside the music sector, music festivals are increasingly becoming a driver of **cross-discipline artistic interaction**. As the number of festivals continues to rise (Section 2.4), many are finding ways to diversify their program offering. An example of this is the work that is being done by the Artswells Festival (Wells, BC). Hosted by Island Mountain Arts, this festival includes artistic practices from film to Ukrainian dance to children's programming. In addition to generating immense economic impact to a small community, the festival creates benefits for the wider creative sector and artistic development through meaningful collaboration.

A city/province with a **robust live music scene validates the contribution** that live music, its practitioners, and its audiences make to culture, the economy and our society as a whole, encouraging participation for the next generation of artists and audiences.


Khanvict
Photo credit: Virinder Sangha, BeTrue Cineworks

6. Conclusion

While live music has played a long-standing role in the health of the province's music ecosystem, there has been little available evidence of live music's contributions to the wider economy and the cultural life of British Columbians. This economic impact assessment (EIA) will enable BC's live music industry to not only benchmark and measure its progress over time, but better understand the common challenges facing stakeholders across the province, and the undeniable sense of positivity for the future in terms growth and impact.

This report enables the industry to both make more informed strategic decisions, and to see itself as an important and inclusive whole. The stories captured within the profile highlight live music's critical place within the overall music sector and the wider economy (including direct, indirect, induced and fiscal impacts) and are well positioned to help assess, strategize, influence and implement necessary changes in the ecosystem. Key non-economic impacts have also been illustrated, such as live music's contribution to social cohesion, organizational capacities, and co-production between music and other creative industries in BC.

The importance of industry associations cannot be underestimated. Music Canada Live, the first association created specifically to represent the interests of the live music industry, is dedicated to helping the industry reach its full potential through research, collaboration and advocacy across Canada. It is Music Canada Live's hope that it is seen as a key resource for promoting and advancing the objectives of BC's live music industry.

> ***"The ambition of this work is to help you see yourself as part of the bigger picture of this industry, where you fit, imagining what's possible, and how you can help us to ensure that every single facet of your work is valued and respected."***
>
> ***Erin Benjamin, ED, Music Canada Live***

In an era where live music is more important to artists' incomes than in the heyday of physical sales, the championing of the industry has never been more important. The time has come to better understand the story of BC's live music industry, the multifaceted challenges it faces, and the opportunities that exist to support its growth and impact. Evidence herein suggests that returns on private and public investment in BC's live music industry will resonate across the province's economic, social and cultural well-being. Ultimately, the sector has already heard the beat; it is now waiting for others to tune in.

Appendix 1 – Stakeholder Engagement Summary

Alongside an online survey tool, nearly 60 stakeholders were consulted through 1-1 interviews and focus group sessions. A complete list of stakeholders consulted can be found below.

Table 4: List of stakeholders consulted

Name	Position	Organization
Alan Gelfand	Founder	Fair Ticket Solutions
Alex Kerr	Director of Marketing	Atomique Productions Ltd.
Alex Vyskcil	Promoter	Live Nation
Amanda Schweers	Booking/Consultant	The Feldman Agency
Andrew Turner	Booker	SBC Restaurant
Andrew Homzy	ED	Nanaimo International Jazz Festival
Andy Hillhouse	Hillhouse	Harrison Festival
Anna Hilliar	Production Manager	Basscoast Festival
Caitlin Thompson	ED	Bella Coola Music Festival
Charles Barber	Conductor and Artistic Director	City Opera Vancouver
Christopher Reiche Boucher	Teacher	Larsen School of Music
Dale Rasmussen	Owner	Razz Music
Dane Roberts	Creative Director	Victoria Ska Fest
Daniel Lapp	Music Director	Victoria Fiddle Society
Darb Erickson	Cultural Manager	City of Victoria
David Geertz	Founder and CEO	Sokap Community Networks
David Hawkes	Host, The Creators	Shaw TV
David Pay	Artistic Director	Music on Main
Deb Beaton-Smith	Owner	Beat Music Management
Debbi Salmonsen	Managing Director	Vancouver Folk Music Festival
Dimitri Demers	Co-Owner	Sugar Nightclub
Dylan Stone	Owner	Dylan Stone Music
Eva Patenaude	Manager	EP Promotions
Heather Redfern	ED	The Cultch
Ian Cromwell	Organizer	Locals Lounge
Ian Rye	CEO	Pacific Opera Victoria
Claire Butterfield	Regional Director	Fox Glove
Jane Butler McGregor	CEO	VCM
Jasmine Liddell	Artistic Director	The WISE Social and Community Arts Club
Joanna Maratta	ED	BC Touring Council
Joey Caughey	Marketing	Stand One Records

Name	Position	Organization
Julie Fowler	ED	Island Mountain Arts
Karma Lacoff	Chair BOW	Karma Reine Productions/BreakOut West/ Creative Okanagan
Kassandra Guagliardi	Assistant General Manager	Alexander Gastown
Kate Lackey	Coordinator	Atomique Productions Ltd.
Kayla Quan	Box Office Manager	Atomique Productions Ltd.
Kelly Nakatsuka	AD	Cowichan Folk Guild
Kirsten Schrader	Arts and Culture Manager	Cowichan Valley Regional District
Kris Barnes	Promotions Manager	Atomique Productions Ltd.
Lloyd Fitzsimonds	ED	Royal & McPherson Theatres
Marie Bachand	Co-creator	Beaon Ridge Productions
Mati Cormier	Organizer	Trash City Productions
Michael Cline	Owner	Vinyl Envy
Mila Czemerys	ED	Fernwood NGR
Morgan Brooker	Manager	Blue Heron Music
Nate Sabine	Marketing Director	This is Blueprint
Nick Blasko	Co-Owner	Atomique Productions Ltd.
Oryanna Ross	Grant Writer	Atomique Productions Ltd.
Paul Runnals	Founding Partner & Senior VP Creative & Production	BrandLive
Peter Sandmark	Musician	Slim Sandy and the Hillbilly Boppers
Pierre Rivard	ED	Centre Cultural Francophone
Piers Henwood	Co-founder	Amelia Artistic Inc
Randy Joynt	Manager of External Affairs	Royal & McPherson Theatres
Robin Layne	Musician	Musician
Shea Dahl	Senior VP	MRG Group
Stephen Franke	President	Blue Heron Music
Stephen Green	Dean of Music	Victoria Conservatory of Music
Terry McBride	Chairman and CEO	Nettwerk Music Group

The voice of live music in Canada

La voix du spectacle musical au Canada

Supported by the Province of British Columbia

City of Vancouver Innovation Fund

Increasingly, more opportunities exist to work with other parties to leverage expertise, funding and access to various in kind resources in order to focus on strategic areas important to the city. This form of leverage allows the City to continue to advance its policy priorities at a lower cost to taxpayers.

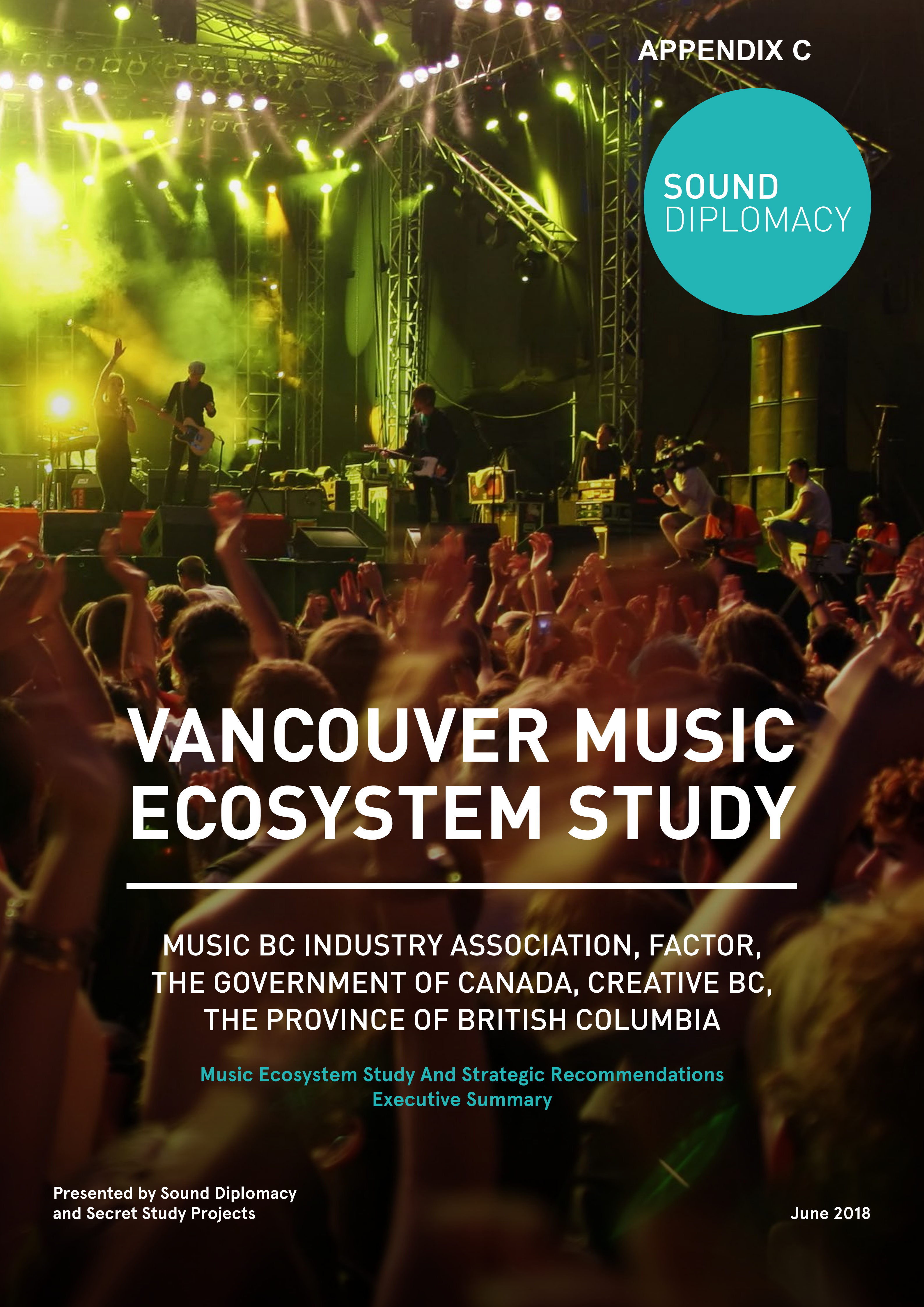
The Innovation Fund is expected to build on the City's experience in leveraging funding and expertise with outside agencies, other levels of government, private sector, universities and not-for-profits to advance key City priorities through aggressive leveraging of external partners.

Some examples of these types of unique opportunities would include: enhancing the success of our urban aboriginal residents; enhancing our local economy with an emphasis on social enterprise particularly in the green sector; innovative child care programs for children at risk; cultural programs which enhance the community and create local jobs for artists; enhancing the involvement of our seniors in community; enhancing our sport strategy through partnerships o significant sporting initiatives; sport for youth at risk; and others.

Guidelines for accessing City of Vancouver Innovation Fund:

With the establishment of an Innovation Fund, one time innovative projects can be funded to advance key agendas in the city. Accessing the City of Vancouver Innovation Fund is at Council's discretion; however, the following guidelines have been established to optimize the use of the fund:

- Aligns with Council Agenda (Housing, Public Safety, Economy, Environment)
- Demonstrates clear outcomes
- Matching requirements – target leverage of 3:1 (minimum 1:1) 3rd party investment (cash and in-kind) to City funding
- Size of CoV contribution should enable a broad range of programs to be supported by fund (Guideline - maximum project size of $250,000 recommended)
- Projects which are one-time innovative opportunities; maximum commitment for expenditure of funds - up to 2 years
- Supports transformation and innovation in meeting City goals; shines a spotlight on Vancouver



APPENDIX C

SOUND DIPLOMACY

VANCOUVER MUSIC ECOSYSTEM STUDY

MUSIC BC INDUSTRY ASSOCIATION, FACTOR, THE GOVERNMENT OF CANADA, CREATIVE BC, THE PROVINCE OF BRITISH COLUMBIA

Music Ecosystem Study And Strategic Recommendations
Executive Summary

Presented by Sound Diplomacy
and Secret Study Projects

June 2018

ABOUT THE PROJECT

Vancouver has a vibrant music scene and a strong music ecosystem. Music contributes to the social and cultural fabric of the city, as well as its economy. It is part of the city infrastructure. There is incredible pride, passion and energy within the music community of Vancouver. It appears, however, that it has not always been channelled into a positive, forward direction that maximises outcomes for all involved. Fostering a collaborative approach to the industry and music ecosystem is critical for breathing life and energy into the environment.

As a result, Sound Diplomacy assessed Vancouver's diverse music communities across genre, ethnicity and sector, and reported on their impact and value across the city.

The aim of the project was twofold: benchmark what Vancouver has and assess it, to develop Vancouver's music ecosystem. The format of the report is as follows, separated into sections.

SECTIONS 2-3

A comprehensive snapshot of the current state of the music ecosystem, based on extensive research in a number of key areas, including economy, infrastructure, tourism, education and existing support systems.

SECTION 4

A comparative analysis of 5 leading music cities, outlining where Vancouver stands amongst them.

SECTION 5

Analysis and consolidated findings across all research sources.

SECTION 6

12 strategic recommendations for a vibrant, sustainable and diverse Vancouver music ecosystem that the world needs to know about.

METHODOLOGY

STEP 1:
COMPARATIVE ANALYSIS

STEP 2:
PLACE RESEARCH

STEP 3:
STAKEHOLDER ENGAGEMENT

STEP 4:
ANALYSIS OF FINDINGS AND RECOMMENDATIONS

VANCOUVER MUSIC ECOSYSTEM STUDY

EMPLOYMENT AND ECONOMIC IMPACT

The Music Creator/ Music Service Industry ratio is 1 to 3.91. For each creative producer, 3.91 people are working further along the music value chain.

EMPLOYMENT

Each entertainment job generated within Vancouver supports an additional 0.83 jobs.

7,945 direct music jobs in Vancouver.

This includes: musicians, festivals, venues, music teachers, music publishers, studios & sound engineers, managers and labels, music press and marketing as well as music in film and theatre.

There are 7,945 direct music jobs in Vancouver, including artists.

The music ecosystem supports a total of 14,540 jobs.

The music ecosystem generates 6,595 indirect jobs.

ADDITIONAL ECONOMIC REVENUE

Musicians, music festivals and venues generate over CAD $172m per year in additional revenue.

Vancouver musicians' average annual income is CAD $18,178 (city-wide average income is $49,702). The national average income for musicians is $22,770.

The average income within the music venue industry is CAD $51,000. The festival business is well above city average, at CAD $65,000.

INCOME/ WAGES

48.6% of survey respondents saw their income rise in the last year. 31.9% retained the same income.

Taking into account the direct and indirect jobs, the employment impact of Vancouver's music industry is over CAD $520m per year.

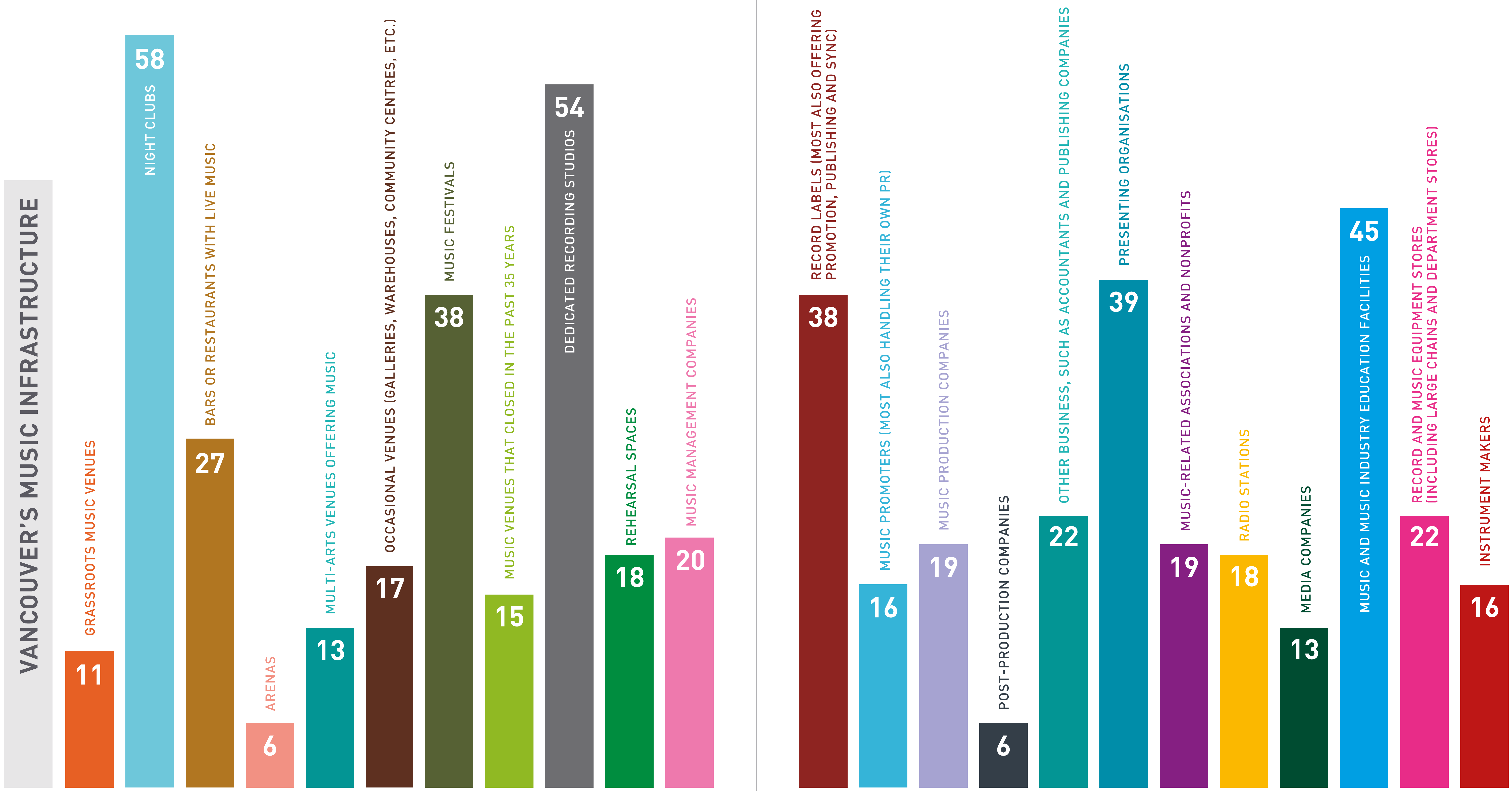
12.6% of respondents saw their income rise by over 25% compared to last year.

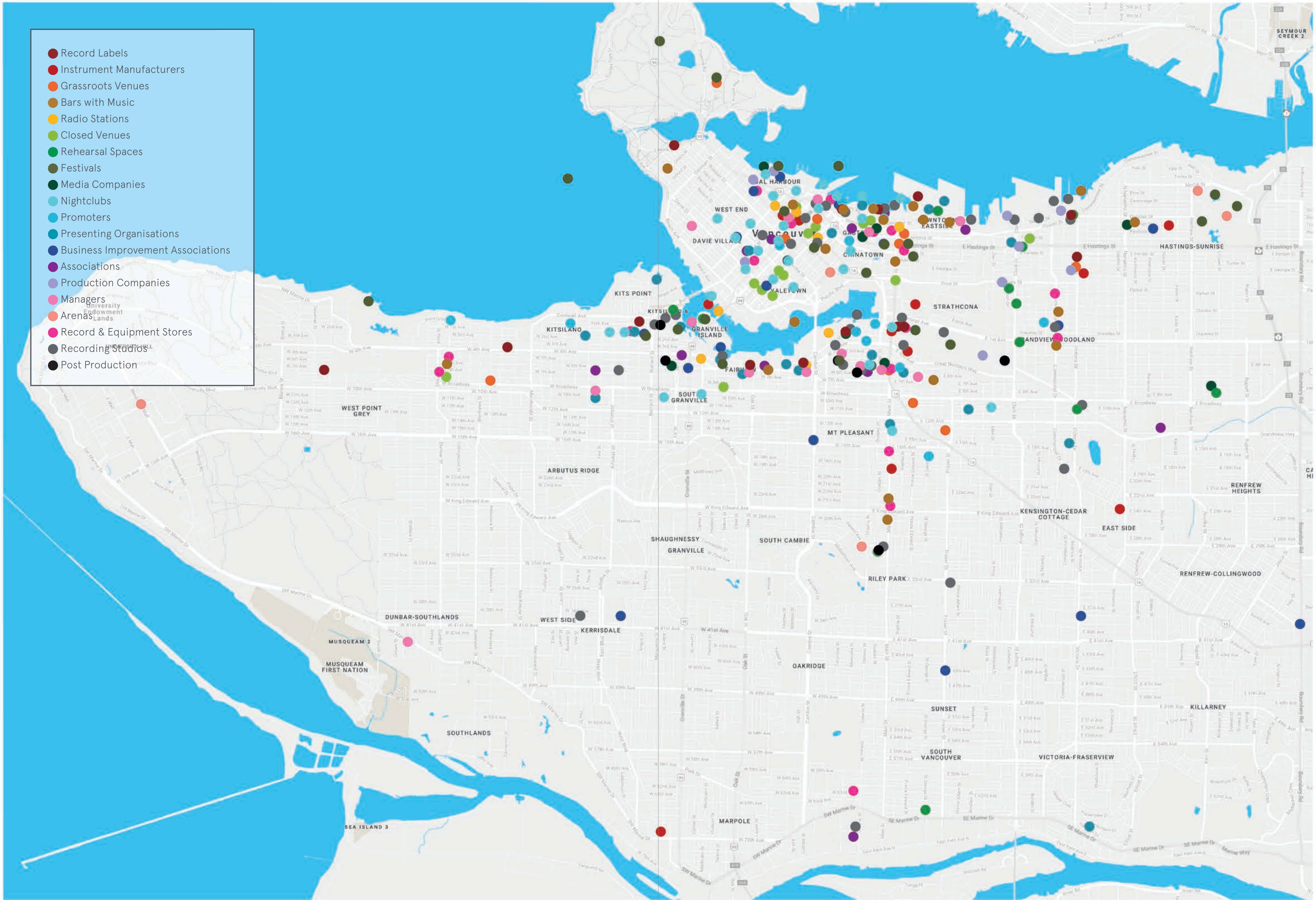
The economic impact of music in Vancouver, including employment and additional revenue, is over CAD $690m.

ECONOMIC IMPACT

The indirect music impact GVA is estimated to be over CAD $1.5billion. Added to the direct economic impact, music is worth over CAD $2.2bn to Vancouver.

MUSIC INFRASTRUCTURE





Record Labels
Instrument Manufacturers
Grassroots Venues
Bars with Music
Radio Stations
Closed Venues
Rehearsal Spaces
Festivals
Media Companies
Nightclubs
Promoters
Presenting Organisations
Business Improvement Associations
Associations
Production Companies
Managers
Arenas
Record & Equipment Stores
Recording Studios
Post Production
WEST END
DAVIE VILLAGE
CHINATOWN
STRATHCONA
KITS POINT
KITSILANO
GRANVILLE ISLAND
SOUTH GRANVILLE
WEST POINT GREY
MT PLEASANT
HASTINGS-SUNRISE
ARBUTUS RIDGE
KENSINGTON-CEDAR COTTAGE
EAST SIDE
RENFREW HEIGHTS
SHAUGHNESSY
GRANVILLE
SOUTH CAMBIE
RILEY PARK
RENFREW-COLLINGWOOD
DUNBAR-SOUTHLANDS
WEST SIDE
KERRISDALE
MUSQUEAM 2
MUSQUEAM FIRST NATION
OAKRIDGE
SUNSET
KILLARNEY
SOUTHLANDS
SOUTH VANCOUVER
VICTORIA-FRASERVIEW
MARPOLE
SEA ISLAND 3
SEYMOUR CREEK 2

KEY FINDINGS

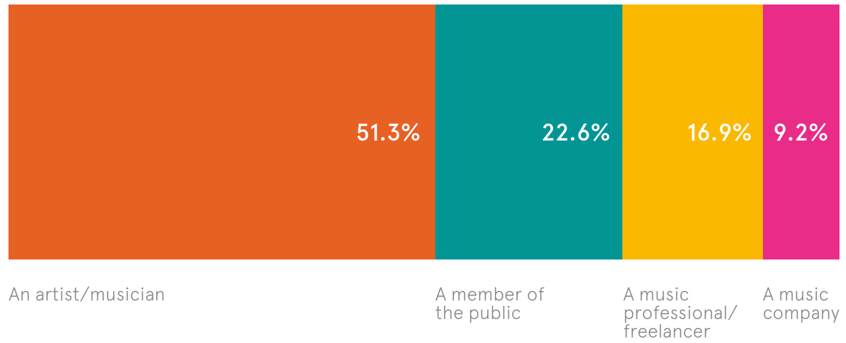
We consulted 120 local stakeholders through in-person interviews and roundtables from key areas in Vancouver's music sector, including education, music technology, artists and professionals, underground scenes and City Hall.

862 respondents engaged with the online survey. 557 complete responses were analysed for this report.

- Survey demographics show that although **a majority of music professionals/freelancers identify as male (63.5%)**, music business ownership in Vancouver has a more diverse composition, as **72.5% music business owners identify as female and/or a minority group**.
- **Most respondents work in a variety of genres**, with an average of **3+ genres per artist** and **6+ genres per company/professional**. Some industry roles also seem to be linked to certain music genres: over half of the Music Educators work in Classical, 58.3% of Record Labels work in Indie/Alternative and 56.25% of Music Promoters work in Dance/Electronic.

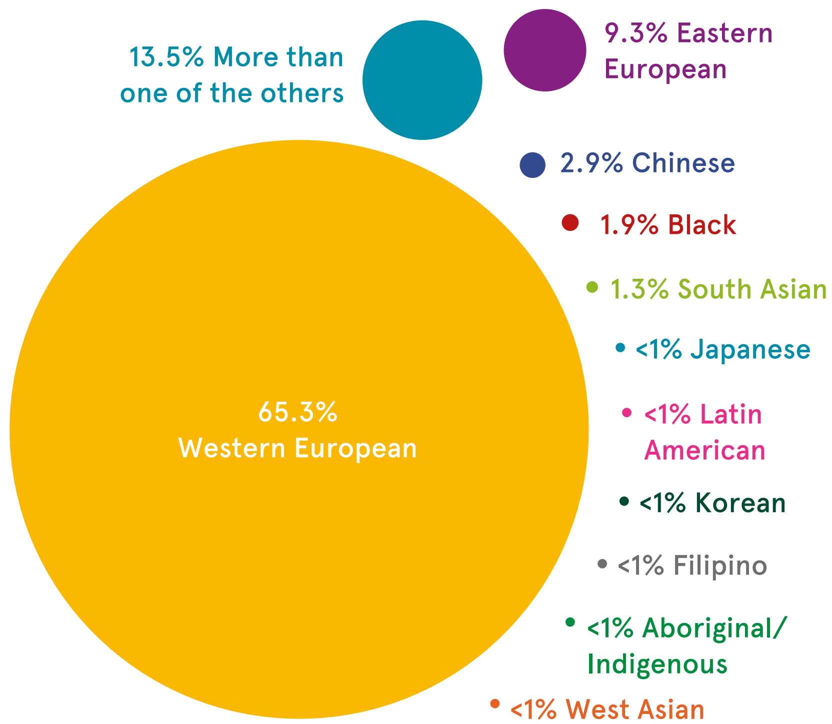
DEMOGRAPHICS OF THE VANCOUVER MUSIC INDUSTRY

The chart below demonstrates the demographics we heard from – 49.6% were artists/musicians, 22.6% were members of the public, 18.7% were music professionals/freelancers, and 9.2% from a music company.



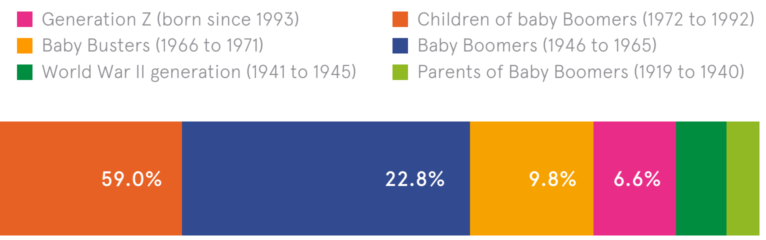
MUSIC INDUSTRY SURVEY RESPONDENTS BY ETHNICITY

The chart is broken down into 6 categories for distinct ethnicities, and 1 category for respondents who have more than one ethnicity.



SURVEY RESPONDENT AGE CATEGORIES

The chart below shows the breakdown of age categories within our survey respondents. The smallest number of respondents were born between 1919-1940, and the largest group were born between 1972-1992.



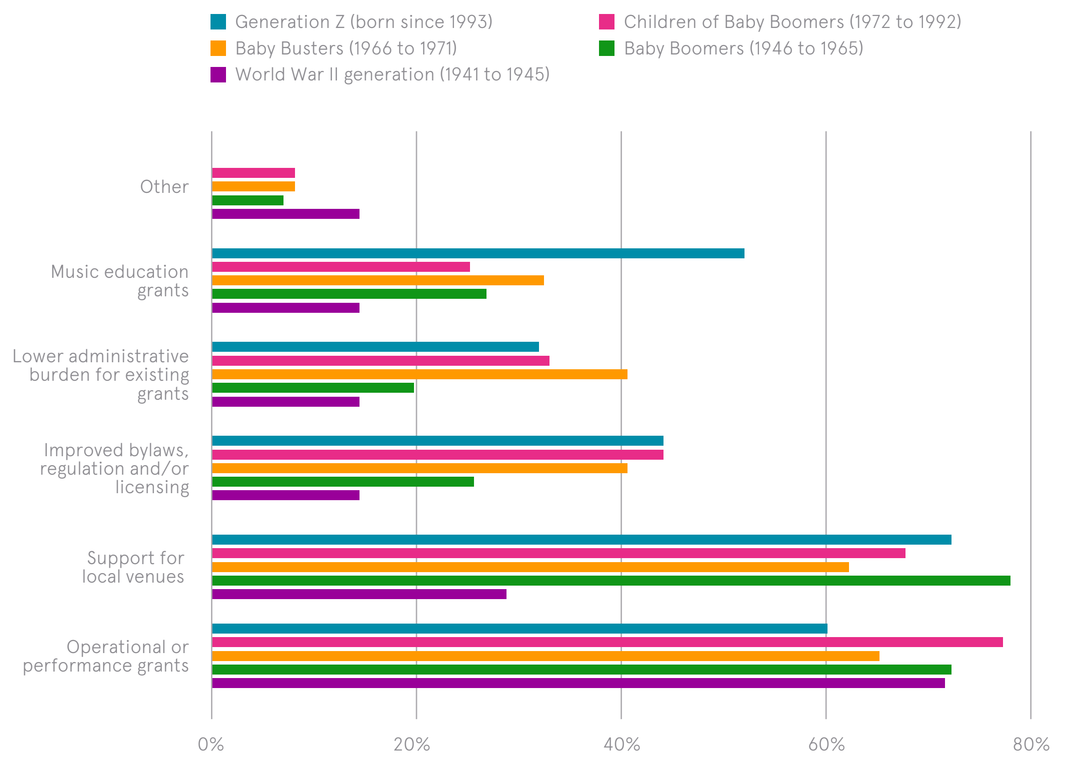
KEY FINDINGS

GOVERNANCE AND LEADERSHIP

Having **clear and flexible bureaucracy** and **accessible advice** around licensing, permits, company registration and bylaws could expand the live music sector in Vancouver. Artist respondents quote **limitations of existing grants,** including genre representation in awards.

AREAS OF BENEFIT FROM ADDITIONAL GOVERNMENT SUPPORT

The graph below shows the areas that respondents believed would benefit most from additional funding. Different generations of respondents answered differently.



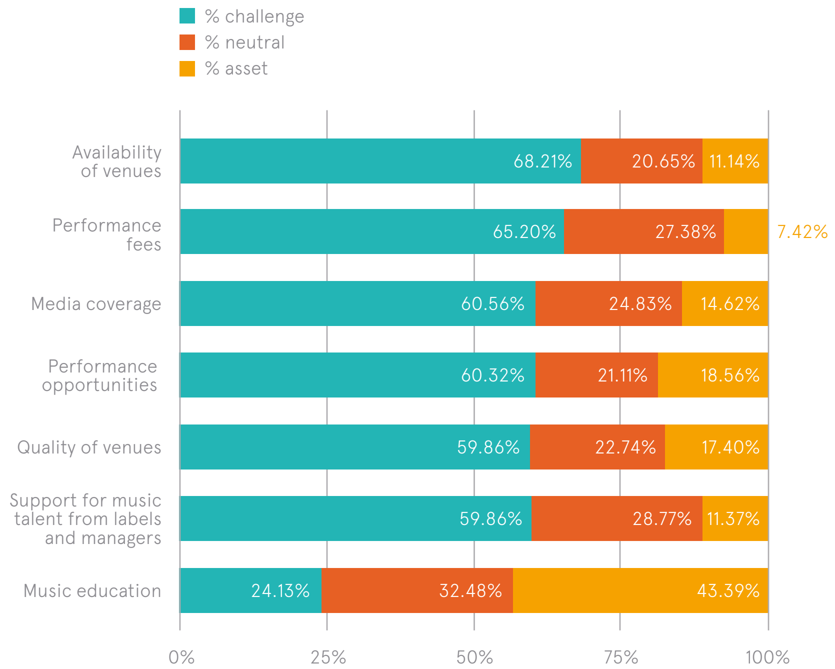
Tegan & Sara © Pavel Boiko

SPACES AND PLACES

The **cost of living** and access to **affordable rehearsal spaces** prevents musicians from focusing on their work. Increasing the **availability of spaces** in the city for artists and organisations is imperative.

FURTHER CHALLENGES AND ASSETS FROM SURVEY RESPONDENTS

The graph below shows in detail more perceived challenges and assets in Vancouver from survey respondents. The findings show that there are more challenges than assets.

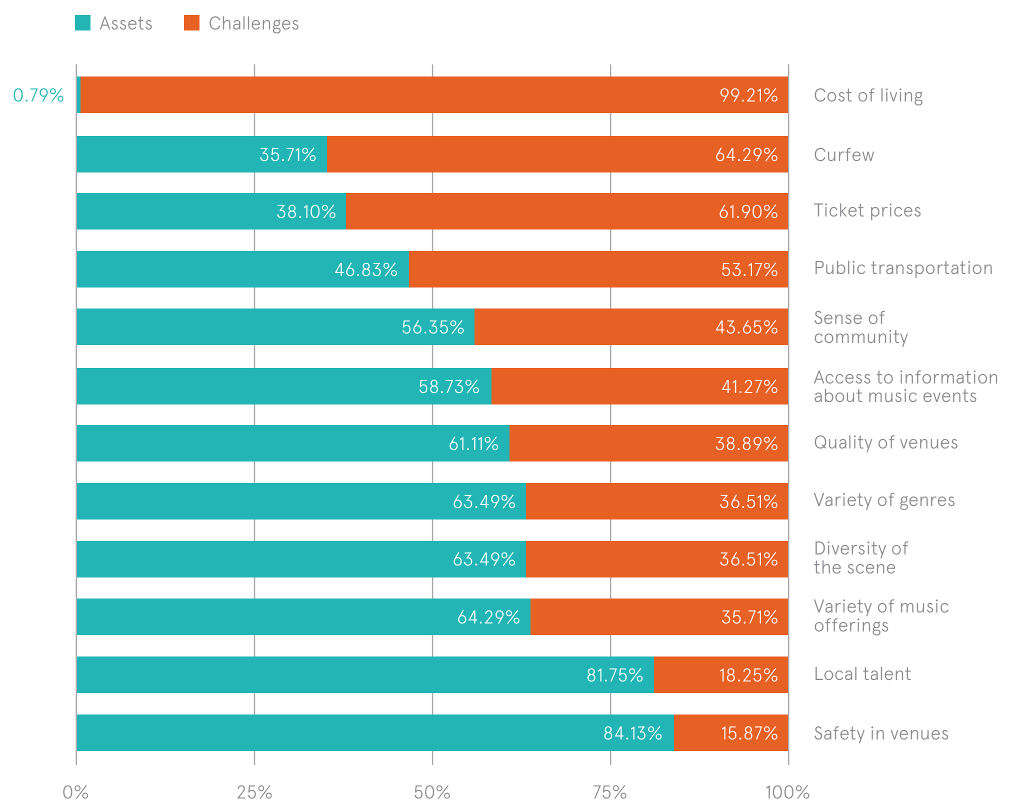


NIGHT-TIME ECONOMY

Fewer events are being hosted because of **obstacles with permits and curfews** in high-activity areas. **Limited late transport options** are available for music audiences in the city.

PERCEIVED ASSETS AND CHALLENGES IN VANCOUVER BY AUDIENCE SURVEY RESPONDENTS

The graph below details the perceived assets and challenges of audience survey respondents. 'Cost of living' is believed to be the greatest challenge, as felt by 99.21% of respondents. 'Safety in venues' is considered by 84.13% of respondents to be the greatest asset of Vancouver.



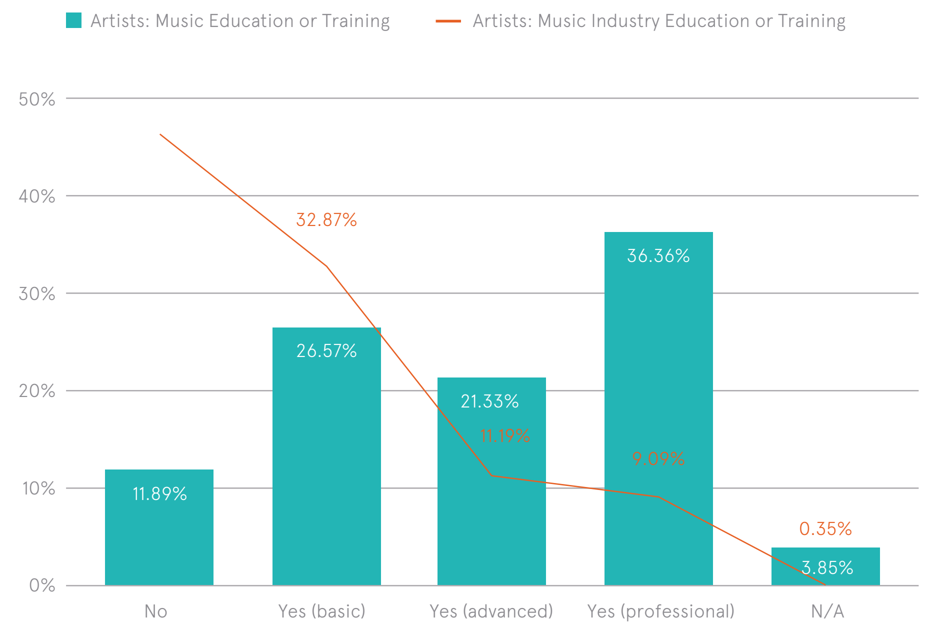

Neck of the Woods © Laura Harvey

MUSIC EDUCATION

There is a **lack of funding and direction** to music education in compulsory learning. Interest in music can increase through **youth outreach** such as mentoring, after school programs and training.

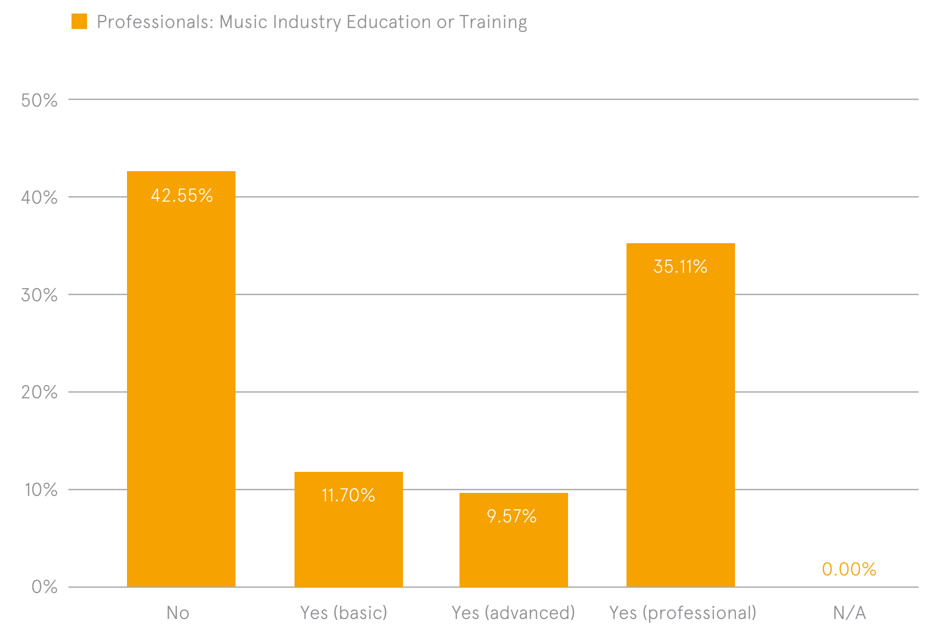
MUSIC AND MUSIC INDUSTRY EDUCATION AND TRAINING

The graph below charts the numbers of artist respondents with music education or training, and music industry education. There is a noticeable difference between the number of artists with no music industry training, compared to music education.



MUSIC INDUSTRY EDUCATION OR TRAINING AMONG PROFESSIONALS

The graph below displays data on music industry education and training among professional music business respondents. This data is analysed in the paragraph below.



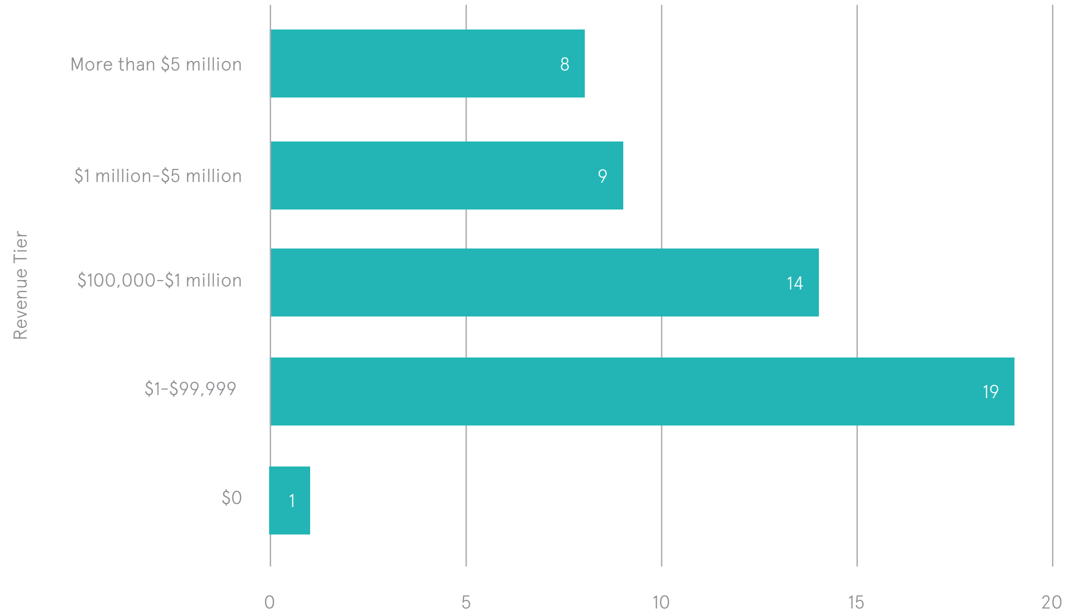
Bend Sinister © Wendy D Photography

MUSIC INDUSTRY PROFESSIONAL DEVELOPMENT

Music professionals state that they would benefit from **mentoring, networking and workshops** to help them expand their businesses and continue to thrive. There is also a demand for **cross-sector collaboration.**

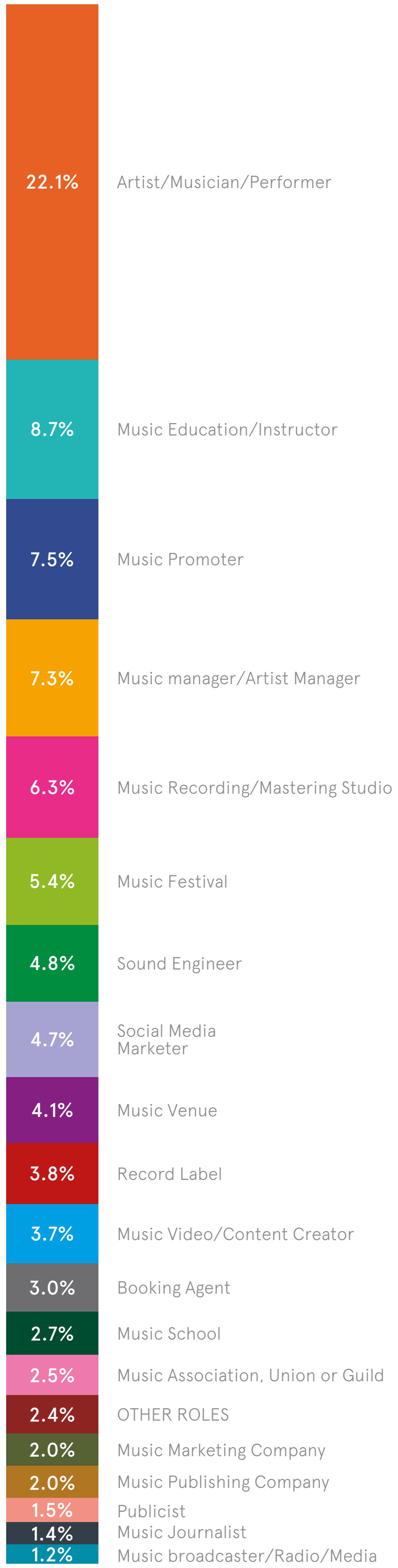
MUSIC BUSINESSES' TURNOVER

The graph below shows the earning tiers of music business owner respondents. The data label represents the number of respondents. The survey respondents revealed that 19 businesses had a turnover of under CAD $100,000 last year, and 8 businesses earned over CAD $5million.



PREDOMINANT ROLES WITHIN THE VANCOUVER MUSIC INDUSTRY

The chart below displays the 19 roles that members of the Vancouver music industry predominantly take on.

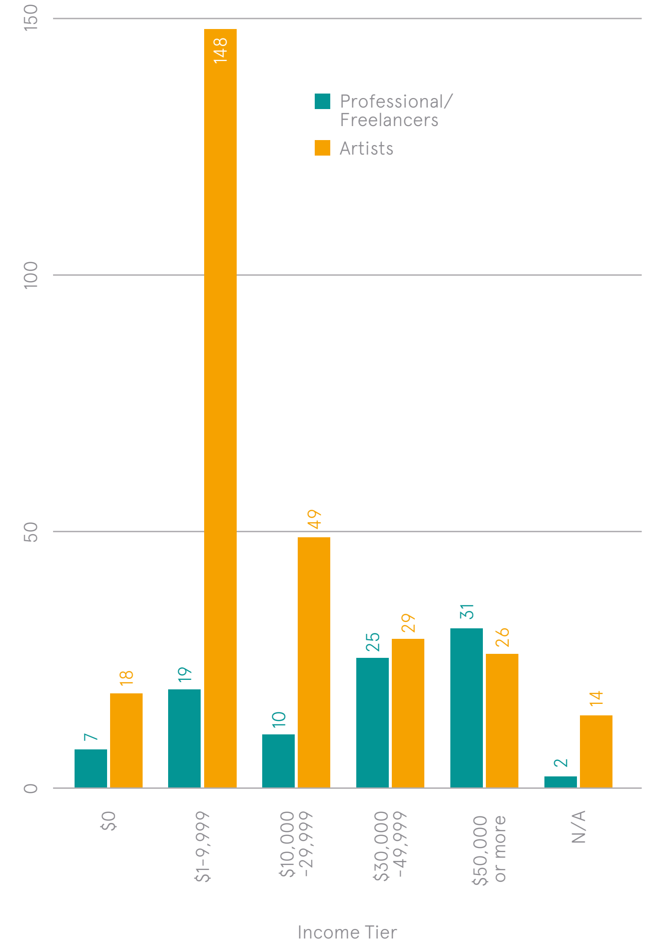


ARTIST DEVELOPMENT

Few Vancouver artists sustain themselves purely through their music. There is also a need for **more support** (both **advisory and monetary**) in terms of **investment, marketing** and **promotion** outside of the city.

INCOMES FROM MUSIC COMPARED BETWEEN PROFESSIONALS AND ARTISTS

The graph below shows the comparison between income from music industry professionals earned from the music industry, and income from artists earned from music activities. The data label represents the number of respondents.

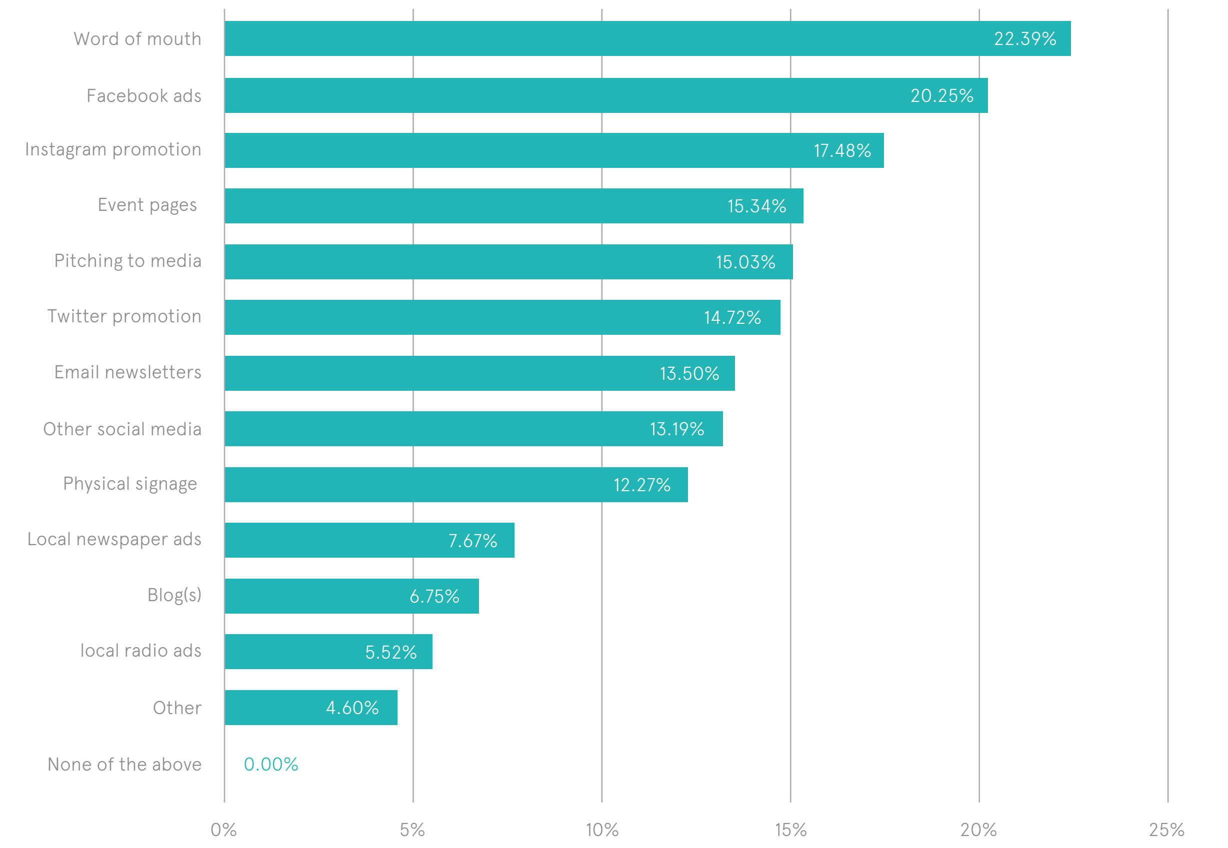


AUDIENCE DEVELOPMENT

Improved transport, affordability of tickets and **utilising local media** and other promotional techniques can develop the size and diversity of current audiences.

USE OF PROMOTIONAL TOOLS FOR MUSIC-RELATED ACTIVITIES

The graph below elaborates on the promotional tools used by the music industry. 12 tools are listed, with only 4.60% stating 'Other', and no respondents stating the 'None of the above' option.



Desi Sub Culture © Shannon Ruth Dionne Photography

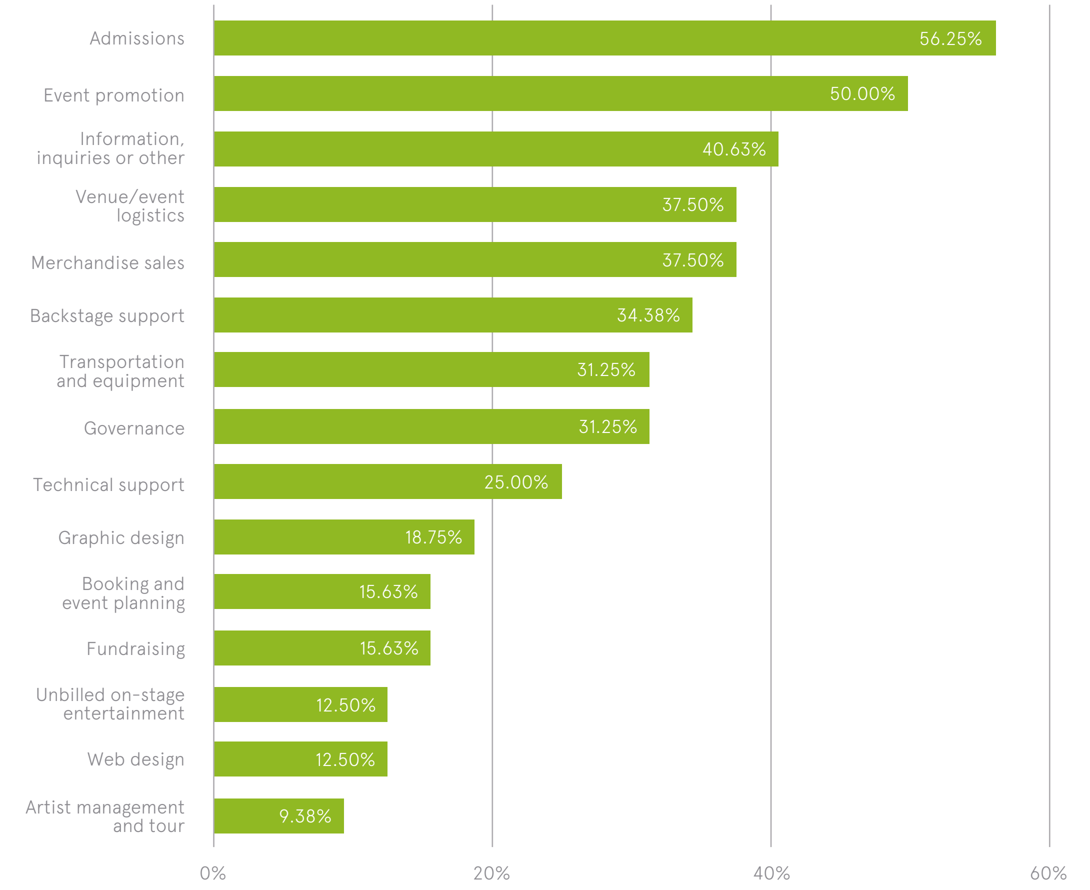
LOCAL INVOLVEMENT

Better dialogue between the city and the music industry would encourage local communities to be more involved in the music scene. Hampering this includes high **cost of living, curfews** and **ticket prices.**

Vancouver Chamber Choir © vancouverchamberchoir.com

VOLUNTEER ROLES IN VANCOUVER MUSIC INDUSTRY

The graph below provides more detail on the types of roles that volunteers frequently undertake within the industry.



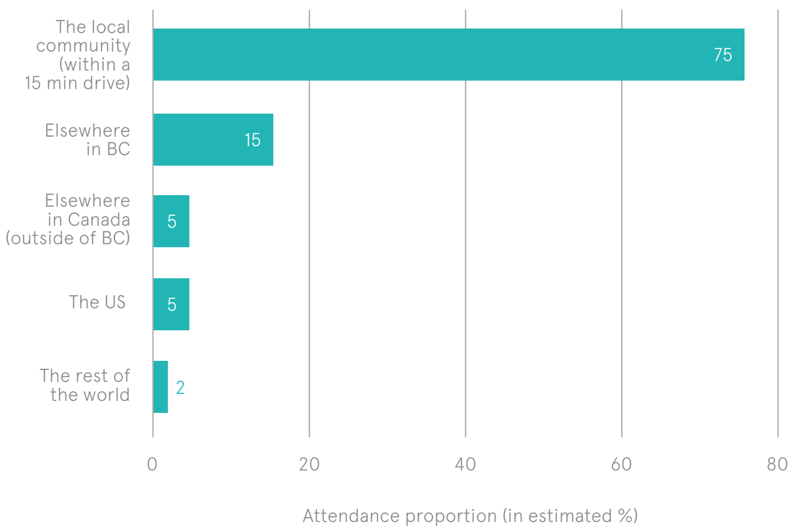

Arkells at The Junos © Laura Harvey

MUSIC TOURISM

The **growing tourism industry** needs a **robust infrastructure** to support and link it more effectively to the music industry. Tourism Vancouver does not **promote** many **music events during peak festival season.** This can be seen as an opportunity to expand on Tourism Vancouver's market capabilities.

ORIGIN OF VISITORS IN LIVE MUSIC ATTENDANCE (PROMOTERS, VENUES AND FESTIVALS)

The graph below reveals that 75% of live music attendees come from the local community, while only 2% come from outside of Canada and the US.

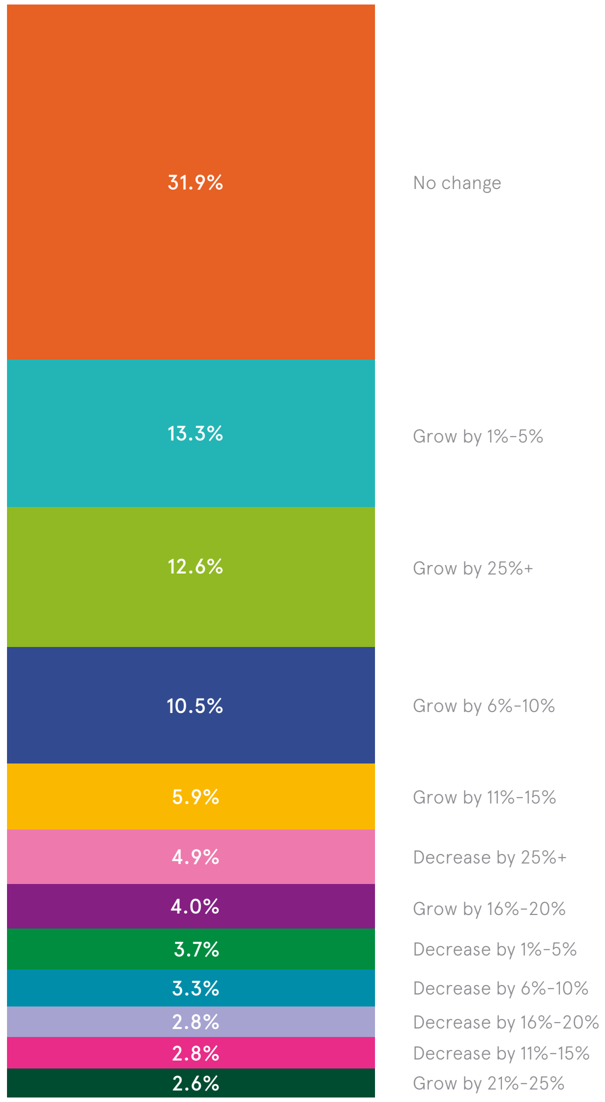


FUTURE PERSPECTIVES

There are a number of opportunities to utilise non-traditional spaces to **create community hubs** for all ages. Many cross-sector opportunities were identified, particularly in the **tech industry.**

INCOME CHANGE OF SURVEY RESPONDENTS IN THE PAST YEAR

A positive picture for most music industry respondents (professionals, artists and businesses) as 49% have reported growth.




Vancouver Symphony Orchestra © vso.org

RECOMMENDATIONS

MAIN GOALS TO BE ACHIEVED THROUGH THE RECOMMENDATIONS

Increase the availability of affordable working and living spaces for professionals of the local music sector.

Ensure a clear communication channel for music-related matters that bridges the gap between the public and private sectors within the music system, streamlines processes internally and cuts down application times.

Develop a leading industry representative body that helps establish, promote and maintain Vancouver as a music-friendly city.

Cluster music spaces and places to boost economic activity.

Connect the local music scene with other cities to share best practices, information and talent exchange in Canada and abroad.

Increase accessibility to performing opportunities for a wider range of local artists.

Support local media and venues that are driving and promoting diversity in the local music ecosystem.

Use policy to improve coexistence between music spaces and places, organisations, street performers and residents.

Increase the safety, diversity, sustainability and significance of music spaces and places in Vancouver.

Increase accessibility for live music audiences in Vancouver in terms of age, abilities, sexual orientation, and cultural and ethnic backgrounds.

RECOMMENDATIONS AND ACTIONS

Each recommendation is explained and mapped out in the complete study. Below is a concise summary of our core findings.

GOVERNANCE AND LEADERSHIP

1. REINFORCE POSITIONS WITHIN CITY HALL TO SUPPORT THE DEVELOPMENT OF THE MUSIC SECTOR

MAIN ACTIONS

· Appoint a Music Officer within the City Manager's Office

NEXT STEPS

· Provide artists and professionals with free assistance in key areas of the music economy and current City requirements

· Set up a monthly meeting with Film, Tech and Community advisors positioned within City Hall

· Measure the impact of the local music sector through a satellite account

2. EMPOWER THE VANCOUVER MUSIC CITY COMMITTEES TO REPRESENT AND CHAMPION VANCOUVER AS A MUSIC-FRIENDLY CITY ON THE LOCAL, PROVINCIAL AND NATIONAL LEVEL

MAIN ACTIONS

· Create a Vancouver Music Advisory Council, evolving the Music City Steering Committee into an official council

NEXT STEPS

· Develop a Canadian Music Cities Alliance

FURTHER ACTIONS

· Strengthen and further develop collaborations with international music cities

3. REVISE EXISTING POLICIES AND PLANNING TOOLS TO PROMOTE A 'MUSIC-FRIENDLY' VANCOUVER

MAIN ACTIONS

· Extend existing 'music-friendly' policies to key activity areas

NEXT STEPS

· Streamline permits and licenses required to produce music events in public spaces

· Mediate between venues and residents to ease sound complaints

FURTHER ACTIONS

· Assess the implementation of an 'Agent of change' principle in key activity areas

4. CREATE A POINT-BASED EVALUATION SYSTEM FOR GRANTS TO SUPPORT THE WIDER DIVERSITY OF VANCOUVER'S MUSIC ECOSYSTEM

MAIN ACTIONS

· Assess requirements for the City of Vancouver to support for-profit organisations

NEXT STEPS

· Create a grant to increase attendance to music and cultural events

· Create a micro-grant for staff training in night-time music venues and clubs

FURTHER ACTIONS

· Provide grants to support access to live music for musicians, professionals and audiences with diverse abilities

· Provide 'quick' live music audience development grants and in-kind support

· Create a micro-grant for media publications that grow and promote the local grassroots music scene

SPACES AND PLACES

5. INCREASE THE NUMBER OF AFFORDABLE MUSIC SPACES AND PLACES AVAILABLE FOR ARTISTS AND PROFESSIONALS

MAIN ACTIONS

· Reassess the criteria and requirements for the Vancouver Civic Theatres program to enable support for for-profit organisations.

· Build a music hub that includes accessible rehearsing/ jamming spaces, co-working spaces, multi-purpose rooms and a performing stage.

NEXT STEPS

· Provide a regulatory framework to facilitate temporary leases for local music and cultural organisations in non-traditional spaces.

Peach Pit © Laura Harvey

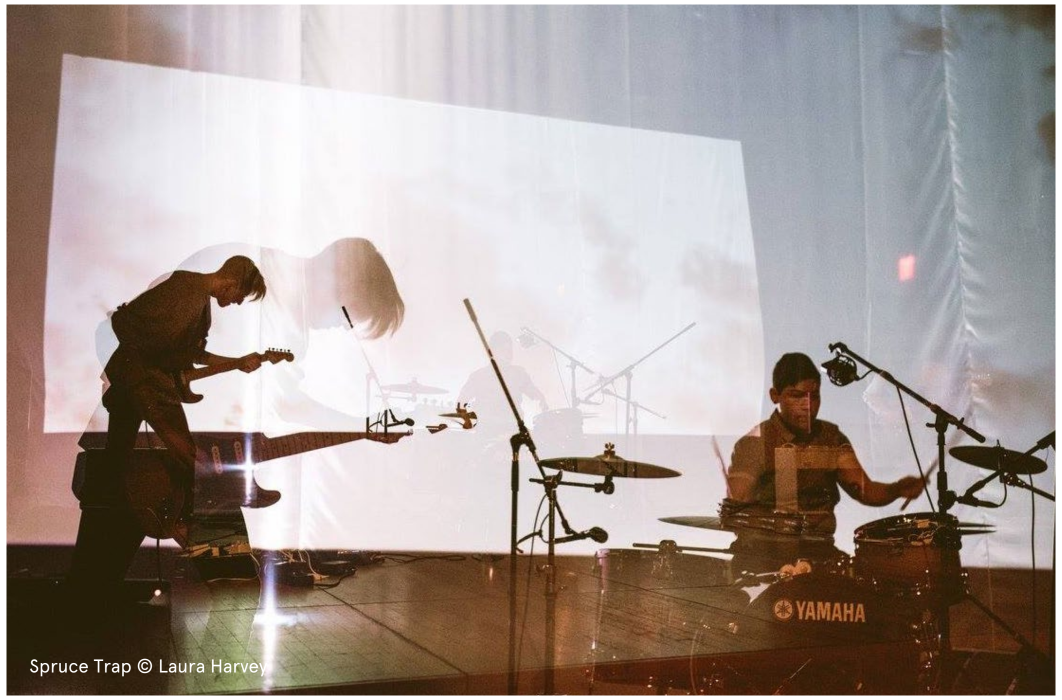
MUSIC EDUCATION

7. REINFORCE THE LOCAL CAPACITY AND AVAILABILITY OF MUSIC EDUCATION PROGRAMS

NEXT STEPS

· Create a network of schools to provide music education as a joint effort

· Develop a music internship and mentorship database


Spruce Trap © Laura Harvey

NIGHT-TIME ECONOMY

6. REVISE EXISTING POLICY AND LICENSING TOOLS TO PROMOTE A MORE DIVERSE AND SAFER NIGHT TIME ECONOMY

MAIN ACTIONS

- Increase the limit number of Special Occasion Licenses for small capacity venues

NEXT STEPS

- Test a curfew extension to selected venues and event promoters in industrial areas
- Extend night-time transport availability in key entertainment areas

FURTHER ACTIONS

- Work with the Province to develop more flexible liquor licensing to allow minors in establishments and events hosting live music
- Promote a 3-star certification for venues and promoters applying internal safety, accessibility and diversity policies in all levels.


Rykka © Christopher Edmonstone Photography

ARTIST DEVELOPMENT

8. INCREASE ACCESSIBILITY TO ARTIST DEVELOPMENT OPPORTUNITIES IN VANCOUVER

NEXT STEPS

- Set up a 'Fair Play' certificate for venues to promote good practice in artist booking

FURTHER ACTIONS

- Advocate for more live/work and housing support programs for the creative industry sector that are inclusive and accessible for musicians
- Organise a creative exchange program for international artists and musicians
- Provide lodging opportunities for artists coming to Vancouver to record, perform or network in the city.

MUSIC INDUSTRY PROFESSIONAL DEVELOPMENT

9. ENCOURAGE PROFESSIONAL DEVELOPMENT IN THE LOCAL MUSIC INDUSTRY

NEXT STEPS

- Organise educational talks and workshops in partnership with local organisations to grasp current and future opportunities available in Vancouver

FURTHER ACTIONS

- Develop a winter music destination event with the collaboration of music stakeholders and the grassroots sector
- Create an industry program for the proposed music destination event
- Allocate a section of the proposed music destination event to be organised by a local professionals coalition.

AUDIENCE DEVELOPMENT

10. INCREASE AND PROMOTE AUDIENCE ACCESSIBILITY IN THE LOCAL LIVE MUSIC SECTOR

NEXT STEPS

- Start a city-wide 'friends of Vancouver music' membership program
- Introduce music programing as part of existing cultural events in Vancouver

FURTHER ACTIONS

- Explore the possibility to develop a BC music quota for local radio stations and mainstream media
- Assess the development of an online show to promote local emerging artists

LOCAL INVOLVEMENT

11. SUPPORT EVENTS, VENUES AND ORGANISATIONS TO GENERATE COMMUNITY ENGAGEMENT THROUGH MUSIC

NEXT STEPS

- Activate music spaces and places as daytime community assets
- Promote youth-organised concerts in civic centres and other community spaces
- Encourage information sharing between local venues and festivals to promote year-round music activities in Vancouver

MUSIC TOURISM

12. CREATE A 'VANCOUVER MUSIC' TOURISM MARKETING CAMPAIGN

MAIN ACTIONS

- Develop a music communication campaign including online presence, marketing and communication materials.

NEXT STEPS

- Define the role of the stakeholders in the promotion of Vancouver as a music-friendly city

FURTHER ACTIONS

- Integrate local music in the design of Vancouver's visitor experience

ABOUT THE AUTHORS

Sound Diplomacy is trusted worldwide to create and deliver strategies that increase the value of music ecosystems.

Music BC is a not for profit association serving the for profit and non-profit music industry.

Secret Study is the creative agency formed by Rob Calder in 2010 to build meaningful and connective experiences in the music space.

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