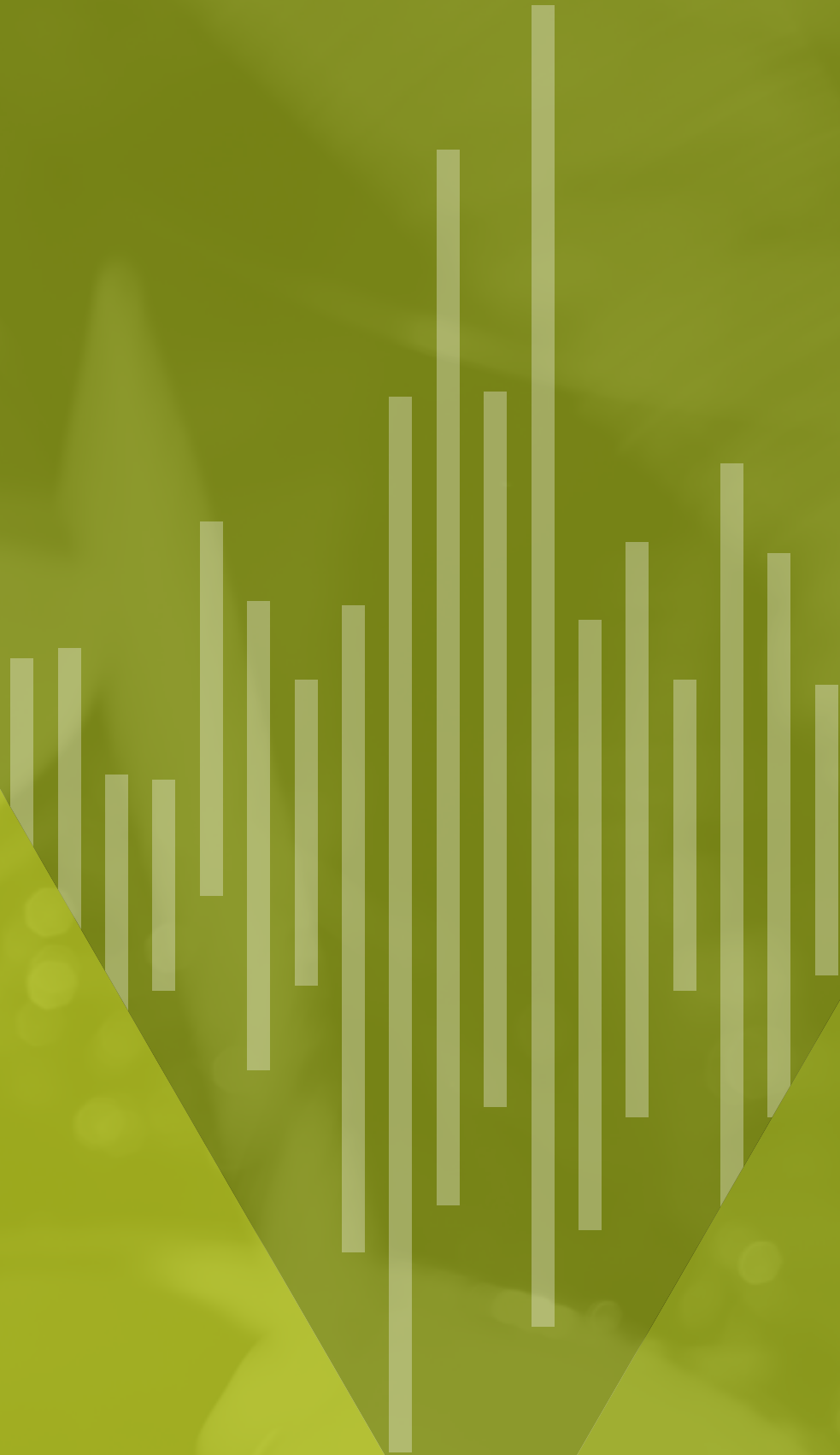


# BC's Music Sector

FROM ADVERSITY TO OPPORTUNITY





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# **BC'S MUSIC SECTOR: FROM ADVERSITY TO OPPORTUNITY**

*A roadmap to reclaim BC's proud music heritage and ignite its  
potential as a cultural and economic driver.*



## FORWARD | MICHAEL BUBLÉ

*It's never been easy for artists to get a start in music. But it's probably never been tougher than it is right now.*

*My story began like so many other kids with a dream. I was inspired by some of the greatest singers – Ella Fitzgerald, Tony Bennett and Frank Sinatra – listening to my grandfather's record collection while growing up in Burnaby. I progressed from talent competitions, to regular shows at local music venues, to a wedding gig that would put me in the right room with the right people – the right BC people.*

*When I look back, I realize how lucky I was. There was a thriving music ecosystem in BC with the people, support, infrastructure and funding that made it possible to move up the ladder.*

*Young artists today face a starkly different reality. Opportunities for musicians are fewer and further between.*

*The reasons for this are by now well known. Fans today experience and consume music in radically different ways than in the past. The business of music has been upended. While this has been great in many ways for consumers and some intermediaries, it has been disastrous for most artists and the people who work with them.*

*As challenging as this may be, we in the music community embrace the change. Music is more popular and pervasive than ever before. But we need to find a way for it to work for artists – especially young musicians hoping to embark on a career. We need to find that way right here in BC, where the situation is especially dire. That is what this study is all about.*

*We all have a role to play. Record labels and other music businesses need to do a better job. Consumers have to rethink how they consume. Governments at all levels have to recalibrate their involvement with music. And successful artists have to speak up.*

*We all have to pull together and take action.*

*I am proud of the fact that BC gave me a start in a career that has given me more than I could have ever imagined. After touring around the world, I am always grateful to come home to BC where I am raising my family. I want young artists to have the same opportunities I had without having to move elsewhere.*

*I endorse the report's recommendations, and urge the provincial government, municipalities and stakeholders inside and outside music to act on them.*

*With swift and decisive action, we can halt the erosion of a storied music scene in which British Columbians, myself included, take great pride.*

*Most important of all, we can make it possible for the next generation of young BC artists to take their place on the world stage.*



Michael Bublé  
Recording Artist

## FORWARD | BC CHAMBER OF COMMERCE

*Community vibrancy and economic diversity are two of the core concerns of the BC Chamber of Commerce and its 125 affiliated chambers of commerce across BC.*

*We operate in a globally competitive environment where young skilled workers are highly mobile, investors and entrepreneurs have a myriad of markets from which to choose, and tourists may select any destination in the world and be there in a matter of hours. It is important we take advantage of every edge to ensure British Columbia's competitiveness.*

*With this report, we have learned that music offers a new, untapped opportunity for BC to further diversify the economy, create jobs, stimulate investment, brand our province and attract tourists.*

*Music is already a competitive advantage for British Columbia. Internationally-renowned BC artists contribute in a meaningful way to our global brand and inspire young people to follow in their footsteps. We have some of the most talented producers and studio engineers in North America. Our music festivals and live events, set against the backdrop of BC's captivating scenery, draw hundreds of thousands of visitors to the province each year.*

*This solid foundation has been undermined in recent years but can again be reignited to deliver broad economic benefits for the province. Based on interviews with close to 100 individuals in music, government and business, and citing best practices from around the world, this report recommends a comprehensive BC Music Strategy. This strategy includes a focus on music education and career development, tourism branding*

*and promotion, a further reduction of red tape, music-friendly municipal policies, and targeted investment in music businesses.*

*Music is a highly entrepreneurial sector of the economy, largely composed of small and medium-sized businesses. Music companies and artist entrepreneurs are active in every region of the province.*

*The BC Chamber is looking forward to working with the provincial and municipal governments, the music community, and our network of chambers across the province in order to enhance the contributions of this important industry.*

*Music is a unifying force: it bridges language, cultural, geographic and economic barriers. A BC Music Strategy is a unique opportunity to enrich our province in all of these ways, and across all regions.*



Jon Garson  
President and CEO  
BC Chamber of Commerce



Photo courtesy of Coldsnap

# TABLE OF CONTENTS

## I

---

### **Introduction** *PAGE 11*

## II

---

### **Executive Summary** *PAGE 15*

## III

---

### **BC's Music Sector: Strengths, Weaknesses, Opportunities and Threats** *PAGE 21*

## IV

---

### **BC's Music Assets** *PAGE 23*

- BC artists: a wellspring of talent | 24
  - Live music scene | 24
- Recording studios, record labels and other music businesses | 25
  - Spaces and places | 27
  - Talented music professionals | 27
  - Receptive and engaged audience | 27
- The added draw: BC's climate, geography and lifestyle | 28

# V

---

## **The Benefits of a Vibrant Music Sector**

*PAGE 29*

- Economic diversification and growth | 30
  - Music tourism | 31
- Cultural development and artistic growth | 34
- Supporting growth in BC's tech sector and other industries | 34
  - Brand building | 35

# VI

---

## **Challenges Facing BC's Music Industry**

*PAGE 37*

- Changes in the global and national music ecology | 38
  - Added external pressures | 39
  - BC's music sector at risk | 40
    - Recording studios | 40
    - Music professionals | 41
    - Live music and festivals | 41
  - Barriers to success, opportunities for growth | 42
    - Artists | 43
    - Other issues | 44
    - Support for Music BC | 44
    - Music education | 45
    - Artist entrepreneurship training | 48

# VII

---

## **Getting Back on Track: Recommendations to Secure the Benefits of a Strong BC Music Sector**

*PAGE 52*

- Provincial government actions | 53
  - Red tape reduction | 54
  - BC Music Fund | 55
  - Music education | 57
- Municipal government actions | 60
  - Land use planning | 60
- Bylaws, licensing, regulations and enforcement | 61
  - Cost recovery for municipal services | 62
  - A municipal music officer | 62
  - Music and arts funding | 62
- Recommendations for Vancouver and Victoria | 62
  - Hubs and incubators | 62
  - Affordable housing | 63
  - Multi-city music alliances | 64
- The role of music stakeholders | 64

# VIII

---

SUMMARY OF RECOMMENDATIONS  
*PAGE 67*

# IX

---

ABOUT THE REPORT CONTRIBUTORS AND ACKNOWLEDGEMENTS  
*PAGE 71*

# X

---

ENDNOTES  
*PAGE 75*





## INTRODUCTION

*British Columbia has a proud music heritage, with iconic international artists, robust infrastructure and talented professionals. But today these assets are at risk. In the face of tough challenges, action is urgently needed to reverse the decline of BC's music sector and to unlock its potential as a cultural and economic driver for the province.*



This report provides a roadmap to ignite the music sector as a source of economic diversification and job creation, not only in Vancouver, but in communities throughout every region of the province, from Squamish to Kelowna, Cranbrook to Prince George and Nanaimo to Fort Nelson, and all points in between. It highlights BC's wealth of talented artists and music assets, the factors that have put those assets at risk, and recommends specific actions for the provincial government, municipalities and music stakeholders to get the sector back on track.

A comprehensive BC Music Strategy will unlock the music sector's potential to generate significant dividends and open new windows for young, emerging artists who are most affected by the sector's challenges. The dividends include job retention and attraction; increased foreign direct investment; economic growth and diversification; increased tourism spending; youth retention and attraction; and spinoff talent attraction for BC's tech industries.

One proposed policy initiative alone – a provincial \$15M investment – would produce an estimated total GDP impact of nearly \$73M from the music business and tourism in BC<sup>1</sup>, according to an analysis by Nordicity<sup>2</sup>.

The time for action is now. At this time, BC retains a critical mass of talent and infrastructure that provides a solid foundation to put the province's music sector firmly back on the map, and to secure the benefits it can generate. Failure to take prompt and comprehensive action would place that foundation at risk. It would almost certainly result in a continued decline that has seen opportunities for young artists fade, recording studios close their doors, work for engineers, artist managers and other music professionals

dry up, and an out-migration of talent and work to other jurisdictions.

The challenges facing BC's music sector are driven by massive changes in the larger ecology of the music industry over the past decade which have put increased pressure on the health of the music economy across Canada and worldwide. Other jurisdictions, both inside and outside Canada, have responded with new policy initiatives, applying additional stress on BC's industry, and in particular, putting BC's recording studio infrastructure at risk.

The potential of music as an economic, job creation and cultural driver is enormous. Demand for music in BC, as elsewhere, has never been higher. Reflecting the insatiable, universal love of music, it is found everywhere: in coffee shops, car radios, exercise classes, joggers' mobile devices, bars, clubs, concert halls, restaurants, homes and far beyond. A disproportionately large amount of the music playing on the world's speakers and earbuds has come from BC: Bryan Adams, Nelly Furtado, Loverboy, Michael Bublé, Sarah McLachlan, Diana Krall, 54-40, Carly Rae Jepsen, Chilliwack, David Foster and many more. With the right steps, there is no reason this success cannot be reignited today and long into the future.

The benefits of a thriving music scene – and a supportive environment that enables it to thrive – have been demonstrated all over the world.

A study of Nashville's music cluster found that the music industry helps to create and sustain more than 56,000 jobs within the "Music City" area and generates a total output of US\$9.7B including more than US\$3.2B of annual labour income and a contribution of US\$5.5B to the local economy.<sup>3</sup> In Melbourne, Australia, a 2012 census identified music as a top driver of the city's economy,

generating more than AU\$1B in spending from live music venues and events, supporting 116,000 annual full-time equivalent jobs along with significant spin-off benefits to restaurants, hotels, transportation companies and other providers.<sup>4</sup>

The focus of this report is on commercial music, as it provides the greatest opportunities to deliver the benefits described above. It encompasses the whole music ecosystem, both live and recorded, music's key stakeholders, and its underpinnings in music education. Those stakeholders include not only the people and businesses working in music, but also the provincial government, municipal governments, economic and tourism development agencies, the provincial and local chambers of commerce, business improvement areas and others.

This report was prepared by Music Canada. Its findings are based on in-depth interviews and consultations with more than 100 individuals in BC's music sector, the broader business community, the BC Chamber of Commerce, municipal governments, the provincial government, provincial government agencies and community leaders. The interviewees include more than 50 active members of BC's music sector, in both major and regional centres, representing a wide cross-section of music stakeholders and expertise: artists, music publishers, promoters and managers, venue and festival operators, recording studio owners and managers, executives with major and indie record labels, entertainment law, radio and more.

Music Canada acknowledges the large debt of gratitude owed to the many people who generously contributed their time and expertise toward this report.

That debt extends to the numerous provincial and municipal government officials whose input and feedback were pivotal in developing the report's recommendations. Officials with several Provincial Ministries – Community, Sport & Cultural Development; Education; Finance; Jobs, Tourism & Skills Training; and Small Business, Red Tape Reduction, as well as the Premier's Office – provided invaluable information and guidance in consultations with Music Canada over several months.

It also extends to the BC Chamber of Commerce, which provided guidance and support in the preparation of this report, and will play an important role in implementing a BC Music Strategy. The Chamber's support is reflected in the foreword provided by its President and CEO, Jon Garson.

The report is also informed by an extensive review of studies, data and reports on the music and creative industries, from numerous sources.

The recommendations based on this input are tailored to the specific needs of BC and are designed to position the province to compete in an increasingly global marketplace while also creating more opportunities for emerging BC artists to succeed and earn a living from their music. With prompt action, the prospects for getting BC's music sector back on track are excellent. This is an opportunity to get all the key stakeholders in the music sector, provincial and municipal governments, and the broader business community working together to help strengthen and diversify BC's economy. It is an opportunity to harness the power of the music community for the benefit not only of artists and the music sector, but also the citizens of British Columbia as a whole.



Photo courtesy of Bob Steventon



## EXECUTIVE SUMMARY

*BC has a proud music heritage and the key elements needed for a successful and vibrant music economy. However, those assets have been significantly eroded in recent years due to massive changes in the global music ecology and other factors. The foundation on which the province can rebuild a vibrant and competitive music sector remains. With immediate action, music will produce extensive benefits for the industry and the province at large.*



## **BC'S MUSIC ASSETS**

**BC ARTISTS:** BC has produced a disproportionate number of global and national music stars – Bryan Adams, Nelly Furtado, Michael Bublé, Sarah McLachlan, Carly Rae Jepsen, Mother Mother and many more – and has been a virtually continuous source of promising young talent.

**LIVE MUSIC SCENE:** Live music has a significant presence in communities across the province, spanning annual music festivals and performances in venues of every size. The province's relative proximity to Seattle and LA has helped it forge touring and other links with those cities.

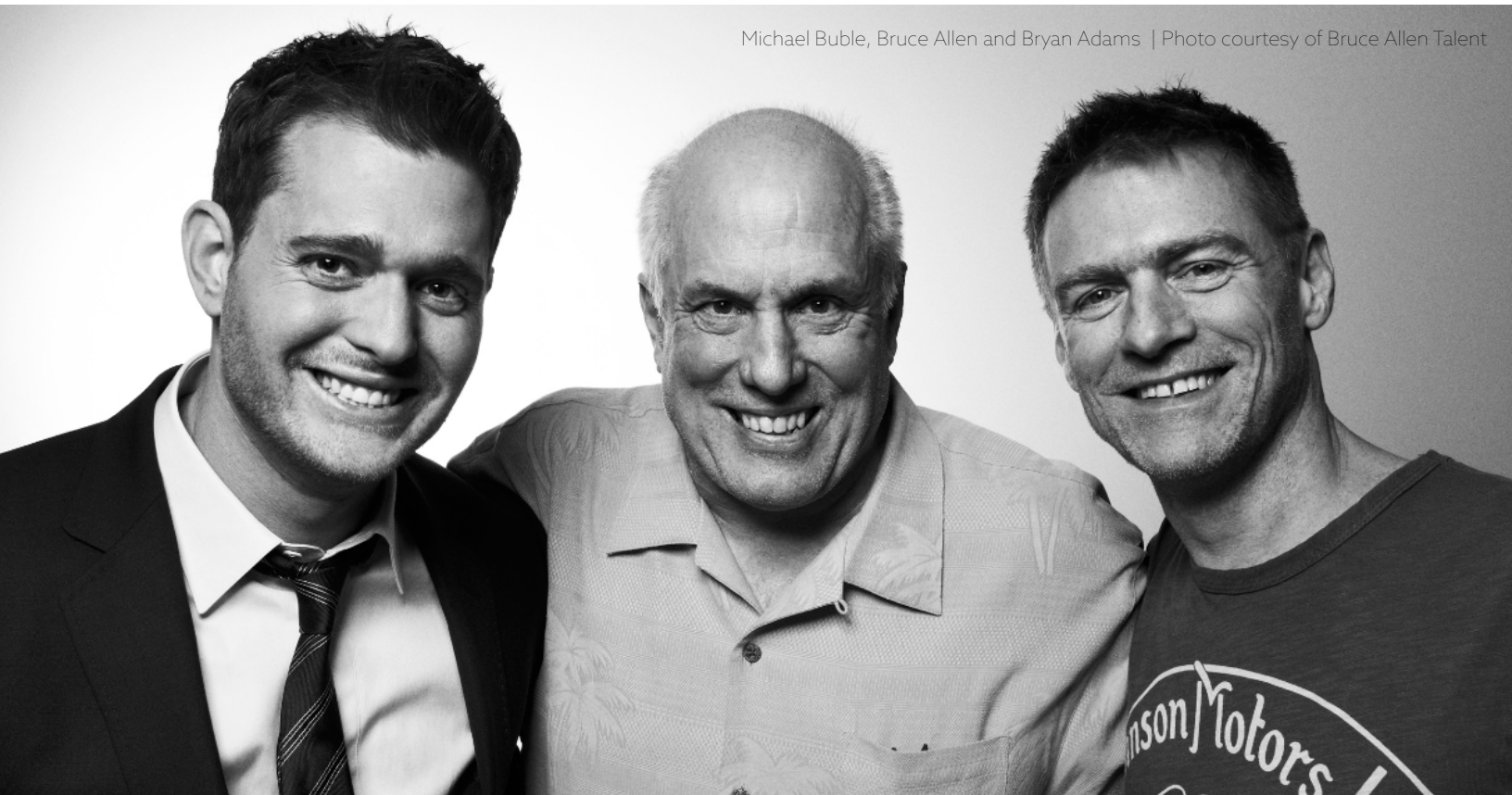
**RECORDING STUDIOS, RECORD LABELS AND OTHER MUSIC BUSINESSES:** BC is the third largest centre for record label production and sound recording in Canada. This includes independent record labels like Nettwerk and 604 Records and the major record labels. The province is home to top recording studios, which were once a magnet for major international artists.

**SPACES AND PLACES:** Spaces and places to perform live music can be found throughout the province, in varying degrees of abundance and a wide range of sizes, from huge arenas to pubs.

**TALENTED MUSIC PROFESSIONALS:** Industry icons like Bob Ezrin, Bruce Allen and Sam Feldman are synonymous with BC's music scene along with many other talented producers, managers, sound engineers, music publishers, record label executives, agents, promoters and others.

**RECEPTIVE AND ENGAGED AUDIENCE:** BC consistently draws large numbers of fans to music festivals, concerts and shows.

**BC'S CLIMATE, GEOGRAPHY AND LIFESTYLE:** BC's stunning scenery and attractive climate offer a unique selling proposition that in the past helped draw in national and international artists, and persuade local artists to stay.



Michael Bublé, Bruce Allen and Bryan Adams | Photo courtesy of Bruce Allen Talent



### **THE BENEFITS OF A VIBRANT MUSIC SECTOR**

Music has enormous potential as an economic, job creation and cultural driver. The benefits of a thriving music scene – and a supportive environment that enables it to thrive – have been demonstrated worldwide.

#### **ECONOMIC DIVERSIFICATION AND GROWTH:**

The music sector is a direct and indirect economic contributor through spending at live music events and by music tourists, sales of recorded music, music exports, artist income, music publishing, agent and manager fees, radio play, and musical compositions for film, TV and commercials. Music revenues can generate significant provincial, municipal and federal taxes. The sector is an important source of economic diversification and of support for the film and tech sectors.

**MUSIC TOURISM:** Music tourism delivers economic and job creation benefits through direct spending on concerts and music festivals and indirect

spending on food and beverage purchases, hotel accommodations, local attractions and more. Tourism-related spending brings new money into the economy.

#### **CULTURAL DEVELOPMENT AND ARTISTIC**

**GROWTH:** A thriving music sector creates more opportunities for artists to develop their talent and their careers.

#### **SUPPORTING GROWTH IN BC'S TECH SECTOR**

**AND OTHER INDUSTRIES:** A vibrant local music scene helps attract talent and investment outside of the music industry, notably in the technology and creative industries.

**BRAND BUILDING:** Music can be a powerful agent to build and shape a city or province's brand. Music can be added to BC's brand, leveraging well-known stars and music festivals to attract tourists, investment and talent.

## **CHALLENGES FACING BC'S MUSIC INDUSTRY**

British Columbia's music assets are in decline and at risk. Several factors are behind this.

### **CHANGES IN THE GLOBAL AND NATIONAL MUSIC**

**ECOLOGY:** Digital technology has precipitated a massive erosion of the legitimate music market, a proliferation of businesses facilitating illegitimate online activity and shifts in consumer habits. Recorded music sales – down 51.2 percent between 1998 and 2006 – and artist earnings have declined in lockstep. Revenue from streaming music services and live music performances fall far short of filling the gap.

**ADDED EXTERNAL PRESSURES:** The Ontario Music Fund has created a wide gap in the financial resources available to the music sector in Ontario and BC. BC has seen artists, music professionals and music businesses lured away.

**RECORDING STUDIOS:** Recording studios in BC, as elsewhere, face competition from do-it-yourself digital recording equipment as well as competition from Ontario recording studios, where up to 50% of recording costs can be recovered via OMF funding. The result: many BC studios are falling into disrepair and some are at risk of closing.

**MUSIC PROFESSIONALS:** Work for BC music professionals, especially those involved in recording, is drying up. This has resulted in an out-migration of talent to other jurisdictions, where there are more work opportunities. A significant concern for BC's music sector is reaching a point where there are too few of the skilled people music businesses need to function.

**LIVE MUSIC AND FESTIVALS:** Very few artists can earn a living exclusively from live music, particularly

in BC where a relatively small population and vast geographic area make touring cost-prohibitive. In addition, while progress has been made at the provincial level, music festivals and live music venues still face barriers from red tape pertaining to liquor licensing, municipal bylaw enforcement and other areas.

**ARTISTS:** An increasing number of artists are leaving BC to record and work elsewhere, and there are fewer opportunities for talented young BC artists. No one can predict how long BC's pipeline of young talent will persist when it is so hard for them to earn a living.

**SUPPORT FOR MUSIC BC:** Inadequate support for Music BC, the province's music association, has hampered its capacity to advocate for and assist the sector.

**MUSIC EDUCATION:** A decline in school-based music education has future consequences for BC's music sector. This trend will undermine the development of the next generation of BC artists and runs contrary to studies linking music education to improved academic results, strong technology and creative sectors, and other benefits.

**ARTIST ENTREPRENEURSHIP TRAINING:** With the massive decline in the resources available to support new and emerging artists, most artists today record, distribute and market their own music with little or no outside support. Currently there is no entrepreneurship training for young BC artists to acquire the skills they need in this do-it-yourself environment.

## **GETTING BACK ON TRACK: SECURING THE BENEFITS OF A STRONG BC MUSIC SECTOR**

The critical mass of elements needed to rebuild a thriving, competitive music sector in BC – artists, music professionals and music businesses of all sorts – are in place. But those “raw materials” have been deeply eroded and are currently at risk. The need for action is urgent.

A comprehensive BC Music Strategy will unlock the music sector’s potential to generate significant dividends and open new windows for young, emerging artists who are most affected by the sector’s challenges. This will involve comprehensive, innovative policy initiatives at both the provincial and municipal levels; a modest investment by the provincial government; collaboration and leadership within the music sector itself; and the active involvement of key stakeholders such as the BC Chamber of Commerce.

The actions required are straightforward, cost-effective and relatively easy to implement. The strategy will also bring benefits to every region of the province.

### **PROVINCIAL GOVERNMENT ACTIONS**

**RED TAPE REDUCTION:** The government has taken steps to improve conditions for the music sector through red tape reductions; more can be done in the area of liquor licensing. A comprehensive Music Red Tape Reduction Strategy should be developed in consultation with the live music community.

**BC MUSIC FUND:** Provincial government investment is urgently needed by BC’s music sector, and would be uniquely impactful as part of a comprehensive music strategy. A BC Music Fund

will stem the outflow of talent, resources and activity to other regions. A well-designed program would stimulate foreign direct and local private investment in BC’s music sector, and would have a significantly net positive impact on the province’s GDP. To produce optimal benefits, it would be applied in: sound recording; live music performance; distant location tour development; a program for capital investments in music companies; music tourism strategy; and industry development. Regional centres should receive a portion of the funding.

**MUSIC EDUCATION:** School-based music education and career path development, as part of a comprehensive BC music strategy, are important policy areas for provincial government consideration. The Province should establish a Blue Ribbon Task Force, bringing together expertise from government, the education sector and the music industry, to examine the current state of music education and career development and identify opportunities to ensure access to programs in every region.

### **MUNICIPAL GOVERNMENT ACTIONS**

Municipal governments have an important role to play, particularly for live music. Municipal policies and programs can be used to protect existing music spaces, create new ones and build entertainment clusters. Municipal government action should focus on: land use planning; venue licensing requirements; noise rules; bylaws, regulations and enforcement; cost recovery for municipal services; a music office or officer; and funding for music and the arts. Some policies apply specifically to the Greater Victoria Region and Lower Mainland because of their size and skyrocketing costs for music and living spaces.

## THE ROLE OF MUSIC STAKEHOLDERS

The people and businesses who work in BC's music sector have the greatest interest in its success and therefore should take leadership in developing and driving solutions. This starts with increased collaboration and coordination among music stakeholders, and increased support for music industry associations serving BC's music sector. Stakeholders should explore establishing music advisory boards in larger BC centres.

Other recommendations include: a comprehensive research study on BC's live music sector, with the involvement of Music Canada, Music Canada Live and sector stakeholders in BC's live music sector to inform the development of future strategies; and developing a new vehicle to continue the artist development work of the recently concluded PEAK Performance Project.



Photo courtesy of Roving



## **BC'S MUSIC SECTOR: STRENGTHS, WEAKNESSES, OPPORTUNITIES AND THREATS**

*The following chart summarizes the key strengths, weaknesses, opportunities and threats facing BC's music sector. These elements provide a guidepost for the recommendations outlined in this report.*



## STRENGTHS

- ▶ Artists and musicians: BC's wellspring of music talent
- ▶ Iconic international stars from BC (Michael Bublé, Sarah McLachlan, Nelly Furtado, Bryan Adams...)
- ▶ World-class recording studios
- ▶ Successful music festivals
- ▶ A stable of talented music professionals (managers, producers, publishers, live music operators, etc.)
- ▶ A receptive and engaged audience
- ▶ Record labels and other music-related businesses
- ▶ The added attraction of BC's climate, geography and lifestyle

## WEAKNESSES

- ▶ The impact on BC's music sector is the result of massive changes in the global music ecology caused by the erosion of the legitimate market for music. The introduction of digital technologies, a proliferation of businesses facilitating illegitimate online activity and shifts in consumer habits are behind a steep global decline in the sales of recorded music
- ▶ An existing music funding gap with other provinces – drawing away artists, music professionals, recording, festivals and other music activity
- ▶ Provincial and municipal red tape for live music – venue licensing, liquor laws, noise bylaws, etc.
- ▶ Places and spaces: high real estate costs = costly space for artist housing, practice space, studios, etc.
- ▶ Decline of local recording industry
- ▶ Death of smaller live music venues
- ▶ The decline in school-based music education and lack of artist entrepreneur training
- ▶ Geographic distance to other music markets within and outside BC
- ▶ Scarcity of resources for music in rural and remote communities and First Nations communities, and for disadvantaged youth.
- ▶ Insufficient support for framework institutions such as Music BC, the provincial music association, and Creative BC

## OPPORTUNITIES

- ▶ Further red tape reductions through BC's Regulatory Reform Initiative
- ▶ The prospect of new provincial investments in music
- ▶ Increased support for music education and artist entrepreneur training
- ▶ Municipal support for music-friendly business licensing, land-use planning, fair cost recovery for policing and other services, music hubs and incubators, and affordable housing
- ▶ Growth of music festivals
- ▶ A new generation of emerging artists
- ▶ A concerted effort to build music tourism in BC, and to build the BC music brand
- ▶ Migration of more young people to communities with a thriving tech sector, generating larger music audiences
- ▶ Improved support for framework institutions such as Music BC and Creative BC

## THREATS

- ▶ Further contraction of recorded music sales due to digital formats and illegitimate online activity
- ▶ Continued decline in BC's music infrastructure: out-migration of music professionals; decline of recording studios; live music venues; etc.
- ▶ With fewer opportunities, a decline in the number of young people pursuing careers as artists or music professionals
- ▶ Intensified condo and other development, causing expanded restrictions on live music venues
- ▶ The conclusion of the Peak Performance Project in BC in 2015, thereby reducing a source of artist development
- ▶ Continued rise in Vancouver and Victoria property costs, putting living, rehearsal, performance and other music spaces further out of reach
- ▶ Continued erosion of music education

# IV

## BC'S MUSIC ASSETS

*BC retains a critical mass of the key elements needed to rebuild a strong music sector, even after the rapid and ongoing erosion of those assets in recent years. These elements correspond with the key assets identified in The Mastering of a Music City<sup>5</sup> (herein referred to as the “Music Cities” report), an international study that summarizes strategies for cities everywhere to develop their music economies.*

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The “Music Cities” study, authored by Music Canada with support from the International Federation of the Phonographic Industry (IFPI), identified the key elements as:

- Artists and musicians;
- A thriving music scene;
- Access to spaces and places;
- A receptive and engaged audience; and,
- Record labels and other music-related businesses.

With the exception of audience engagement, in BC these elements have been severely buffeted by changes in the global music ecology and other factors outlined in Chapter VI. Nevertheless, the foundation on which to build a vibrant and competitive music sector continues to exist in BC.

The province’s music heritage is a source of pride among BC residents and receives admiration far beyond its borders. For music fans, that principally means BC’s abundance of famous international artists and great music festivals. For the music sector, it means access to talented music professionals, great music fans and the province’s deep well of emerging talent. Until relatively recently, for many Canadian and international artists, it also meant BC’s world-class recording studios.

In addition to the above-noted key elements, the Music Cities report identified several other components that are common to jurisdictions with strong music sectors. These include:

- Multi-level government support for music;
- Music education;
- Music history and identity;
- Music tourism; and,
- Recognition of music as an economic driver.

These elements are explored in Section VII, “Getting Back on Track: Recommendations to Secure the Benefits of a Strong BC Music Sector.”

## **BC ARTISTS: A WELLSPRING OF TALENT**

Relative to its population, BC has produced an impressive number of stars with international and Canada-wide audiences. Among them are Bryan Adams, Nelly Furtado, Loverboy, Michael Bublé, Sarah McLachlan, Diana Krall, Bachman-Turner Overdrive, Chilliwack, David Foster, Matthew Good Band, Carly Rae Jepsen, Payolas, 54-40, Dear Rouge, Marianas Trench and Mother Mother. The province’s pipeline of young and emerging artists has also been a virtually continuous source of “the next big thing.”

Some of the most famous names in Canadian music are intricately associated with the province and thereby support the BC brand, both inside and outside the province’s borders.

## **LIVE MUSIC SCENE**

Live music has a significant presence in communities across the province, spanning annual music festivals large and small, and performances in venues of every size, from mega concerts at Vancouver’s BC Place to cover bands playing the hits at the back of local bars.

The music spotlight has turned increasingly to festivals over the past decade or so, with the emergence of annual events like the Pemberton Music Festival, which attracted more than 115,000 patrons in 2015 over five days and generated a total economic impact of \$56M, according to Dave Fortune, Associate Producer of the festival and General Manager of Touring for Huka Entertainment.



Overall, BC has a strong existing festival and not-for-profit live music network. Other notable BC music festivals include:

- Squamish Valley Music Festival, which generated \$18.7M of economic activity in 2013.
- Shambhala Music Festival, a five-day electronic music and art event in tiny Salmo that attracts 10,000 fans and contributes an estimated \$20M to the economy of BC's West Kootenay region.
- Rifflandia, an annual, four-day cultural highlight in the heart of Victoria featuring more than 100 artists at more than two dozen indoor and outdoor venues.
- Rock the Shores, a popular summer festival in the Greater Victoria Region.
- Keloha Music and Arts Festival in Kelowna.
- Coldsnap – the Prince George Winter Music Festival.

The Okanagan has also developed an active summertime live music scene, much of it at wineries in and around Kelowna. The shows range from intimate sets for as few as 50 visitors to larger concerts featuring well-known headliners such as Lyle Lovett, LeAnn Rimes, Chris Isaak, the Gypsy Kings, the Sam Roberts Band, Pink Martini and Barenaked Ladies.

The province's relative proximity to Seattle and Los Angeles, all within the same time zone, has helped it forge links with those cities' vibrant music scenes and build strong North-South touring networks, particularly into the Northwestern US.

### **RECORDING STUDIOS, RECORD LABELS AND OTHER MUSIC BUSINESSES**

BC is the third largest centre for record label production and sound recording in Canada, behind Ontario and Quebec.

Among the indie record labels located in BC are Nettwerk Music Group, with record label, artist management and music publishing arms, and 604 Records, the production company of Nickelback's Chad Kroeger and attorney Jonathan Simkin. Nettwerk counts Great Lake Swimmers, Sinéad O'Connor, Current Swell, Hey Ocean! and The Trews among its clients while 604 Records represents Carly Rae Jepsen, Marianas Trench, Coleman Hell, Dallas Smith, Theory of a Deadman, and many others.

The three major record labels, Sony Music Entertainment Canada Inc., Universal Music



Canada Inc. and Warner Music Canada Co., all have a presence in BC and BC artists on their rosters.

Inside the music business, the province is best known for its recording studios, including the world-renowned Armoury Studios and The Warehouse Studio. These studios, along with the original Little Mountain Sound Studios, were once a magnet for international artists as well as BC and other Canadian artists. Icons like AC/DC, Aerosmith, Bon Jovi, Heart, REM, Metallica, Mötley Crüe, Van Halen, Cher, KISS, REM, David Bowie, David Lee Roth, Julio Iglesias, Nazareth, U2 and many others were until recently a frequent presence in BC's top studios. Several smaller studios add to the mix, including Hipposonic Recording Studios, Victoria Recording Studio, Digital Sound Magic Recording Studios, Saga Recording, Music City Studio and Woodshop Recording Studio.

Other music businesses in BC include Vancouver-based Live Nation Canada, the Canadian arm of the global live entertainment leader, Atomique Productions, the Victoria-based concert production company behind the Rifflandia and Rock the Shores music festivals and Nimbus School of Recording & Media, among others. They also include the storied music management companies Macklam Feldman Management and Bruce Allen Talent, which both represent top Canadian and international artists, among them Sarah McLachlan, Michael Bublé, Bryan Adams, Bette Midler, Elvis Costello and Diana Krall.

## **SPACES AND PLACES**

Spaces and places to perform live music can be found throughout the province, in varying degrees of abundance. Live music can be found in venues of every size, ranging from stadiums to concert halls seating a few hundred people, as well as

nightclubs, bars and restaurants. Vancouver's Granville Street is a hub of live music activity. It is home to The Commodore Ballroom, which has previously hosted numerous Grammy and Juno Award winners including The Tragically Hip, Tina Turner, James Brown, Hedley, U2, Katy Perry, Metric, Lady Gaga, Nirvana and many other headliners. Live Victoria lists 393 performance venues in that city covering a range of sizes and configurations including dedicated music venues as well as churches and more unconventional spaces.<sup>6</sup>

## **TALENTED MUSIC PROFESSIONALS**

National and global music industry icons like Bob Ezrin, Bruce Allen, Sam Feldman, Bruce Fairbairn and Bob Rock play (or in some cases, previously played) a large part in BC's artist management and recording scene. Other talented music professionals have also supported the BC music sector's historic success: producers, managers, sound engineers, music publishers, record label owners and executives, agents, entertainment lawyers, promoters, marketers, publicists and many others.

## **RECEPTIVE AND ENGAGED AUDIENCE**

A receptive and engaged audience is a key factor in the success of local music scenes.<sup>7</sup> This is certainly evident in BC, which consistently draws large numbers of fans to music festivals, concerts and shows featuring both local and international artists.

David Pay, Artistic Director of Music on Main, a non-profit concert and festival organizer, sees lots of potential to increase live music audiences. "Downtown Vancouver is becoming younger and more diverse," he says. "There's a huge opportunity for art and music that reflects the population."

## **THE ADDED DRAW: BC'S CLIMATE, GEOGRAPHY AND LIFESTYLE**

BC's stunning mountain and coastal scenery, along with its attractive climate, offer a unique selling proposition that in the past helped draw in national and international artists, and persuade local artists to maintain BC as their home base.

"Vancouver is a beautiful, desirable location," says Paul Silveira, Manager and Head Engineer of Armoury Studios. "In the days when recording budgets were bigger, people loved to come here. They came up here to get away from it all. It's such a healthy, vibrant and creative place. And it's only a 2 ½ hour flight from LA."

Scenic vistas and warm evenings are a big draw for the outdoor summer concerts put on by several Okanagan Valley wineries. Shows at the 1,000-seat amphitheatre at Mission Hill Family Estate winery regularly sell out.

"The concerts at the winery provide a once-in-a-lifetime opportunity to see these artists perform in an intimate, outdoor setting surrounded by mountains, a scenic lake and the natural beauty of the Okanagan Valley," Mission Hill spokeswoman Jessica Burchill remarked in an interview with the Calgary Herald.<sup>8</sup>

# V

## **THE BENEFITS OF A VIBRANT MUSIC SECTOR**

*A vibrant music sector can be a significant driver of economic growth and diversification as well as cultural development.*

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These contributions are both direct, for example, generating out-of-province tourist spending at music festivals, and indirect, such as helping attract talented young professionals to work in the province's burgeoning technology sector. International research has identified several key benefits, including:

- Economic impact;
- Music tourism;
- Cultural development and artistic growth;
- Attracting and retaining talent and investment outside of the music industry; and,
- City brand building.<sup>9</sup>

BC's music sector currently plays a role in all of these areas, and with the right measures is capable of contributing much more.

### **ECONOMIC DIVERSIFICATION AND GROWTH**

The music sector is a direct and indirect economic contributor through spending at live music events and by music tourists, sales of physical and digital recorded music, music exports, artist income, music publishing, agent and manager fees, radio

play, and musical compositions for film, TV and commercials. According to "*British Columbia Music Sector Industry Profile*," a PwC research study commissioned by Creative BC, the total income earned by BC artists in 2013 is estimated at \$245-\$265M.

Together, direct and indirect music revenues have the potential to generate significant provincial, municipal and federal taxes through sales taxes, property taxes, income taxes and various fees.

In a 2013 report on the province's economy, the Ontario Chamber of Commerce identified music as one of Ontario's key sources of competitive advantage.<sup>10</sup> More recently, the BC Chamber of Commerce has joined the growing chorus of authoritative voices that have come to the same conclusion in their own jurisdictions.

"Music offers a unique opportunity to impact municipalities throughout the province where members of the BC Chamber of Commerce operate," says Jon Garson, President and CEO, BC Chamber of Commerce. "We also know from studies of cities around the world that a vibrant



Photo courtesy of Nimbus School of Recording & Media

music scene is an important catalyst for the attraction of investment and talent, both within and outside the music sector."

Through its direct and indirect impacts, the music sector can be an important source of economic diversification for BC. As the tech and film and TV industries have added to the province's economic mix, so too can music. Moreover, music is a critical support for both the film and tech sectors, as described below in this section.

### **MUSIC TOURISM**

Music tourism delivers proven economic and job creation benefits. They are generated by direct spending on concerts and music festivals and, more importantly, indirect spending on food and beverage purchases at restaurants, bars and clubs, hotel accommodations, local attractions and entertainment, transportation and more. Best of all, tourism-related spending brings new money into the economy.

"Music tourism and marketing offer rewarding opportunities for economic growth and brand development at the provincial, regional and city levels," concluded Nikki Rowling, President of Titan Music Group, in her contribution to the 2013 study, *The Next Big Bang: A New Direction for Music in Canada*.<sup>11</sup> "Some cities with strong commercial music and live event offerings have achieved spectacular results through successful music tourism development strategies. There are opportunities to replicate those successes in many cities and provinces across Canada."

Most jurisdictions in Ontario capture the impacts of arts and culture tourists generally. The Ontario Arts Council, for instance, studied the impact of



Photo courtesy of Sam Thom Photography

arts and culture tourists in 2013, concluding that they stay longer and spend more than the average tourist. While the report did not comprehensively study music tourism, specifically, it did find that music performances were the largest tourism driver among all arts activities.<sup>12</sup>

More recently, *Live Music Measures Up: An Economic Impact Analysis of Live Music in Ontario* quantified and analyzed the live music industry in Ontario. Music Canada, in partnership with Ontario's Ministry of Tourism, Culture and Sport, engaged Nordicity to complete this first-ever profile of the live music industry. The report found that past estimates, based on Statistics Canada data, had long underestimated the sector's economic impact. The study tagged the impact of Ontario's live music sector at \$1.2B – a figure three times larger than previous estimates. This impact of live music companies includes 10,500 full-time equivalent jobs, and tourism activity that accounts for an additional 9,520.<sup>13</sup>

Extrapolating from this finding, there is a strong likelihood that the economic impact of music tourism in BC is more significant than previously imagined. In addition, the Ontario results were based on just 11% of ticket sales outside of Ontario, providing optimism for future growth opportunities. If this is also true in BC, there is an enormous upside to featuring music as part of BC's tourism branding, and marketing the province's music scene to the rest of the world.

In Austin, Texas alone, music tourism generated almost US\$800M in economic output in 2010, according to a 2012 study.<sup>14</sup> A separate study commissioned by SXSW, the city's iconic annual music festival and a major tourist draw, tagged the festival's 2014 economic impact at US\$315M.

In BC, the Squamish Valley Music Festival, generated a total of \$18.7M of economic activity in 2013, according to a report on the event.<sup>15</sup> The study found that the festival generated approximately \$10M in spending in the local community.

"The benefits to Squamish from this event are clear and range from direct spending that puts money in the pockets of local businesses to increased awareness of Squamish resulting from the fact that 90% of festival-goers come here from outside our community," District of Squamish Mayor Rob Kirkham remarked in a news release outlining the study's findings.

The report found that 73.2% of attendees stayed overnight in the Squamish area, averaging 2.7 nights each. Approximately \$4.3M was spent by festival-goers at restaurants and bars, food and liquor stores, and retail shops.

In 2015, the Pemberton Music Festival produced an even larger economic impact. The event, attended by more than 115,000 patrons, generated more than \$56M in direct and indirect spending.

Even small, relatively out-of-the-way locations can deliver big tourism results. The Shambhala Music Festival in Salmo attracts 10,000 music fans and 1,000 volunteers, contributing an estimated \$20M to the West Kootenay region's economy.<sup>16</sup> The festival's impact has grown rapidly: 15 years ago it attracted just 500 fans.

Each year, the festival organizers generously give back to the community, supporting music education, the construction of local skateboard parks, as well as food banks, public libraries and community youth and family centres.

## CASE STUDY: PEMBERTON MUSIC FESTIVAL BECOMES A KEY SEA-TO-SKY ECONOMIC DRIVER

*The 2015 Pemberton Music Festival brought music, people and commerce together over five days in a scenic mountain valley overlooked by Mount Currie, in Pemberton.*

*The event, relaunched the year before by HUKA Entertainment after a long absence, generated more than \$56M in direct and indirect spending by more than 115,000 patrons. An additional 5M fans experienced the five-day event, which featured multiple live performance venues, numerous food and beverage vendors, as well as other attractions and entertainment, via Snapchat.<sup>17</sup>*

*The main draw was an impressive lineup of world class entertainment with more than 90 artists including Kendrick Lamar, The Black Keys, J.Cole, Kid Cudi, Missy Elliot, Weezer, Jane's Addiction, Billy Talent, Chromeo and Sam Roberts Band.*

*The festival's 2015 attendance grew significantly from the year before, when 75,000 patrons attended the event. An economic impact study of the smaller 2014 festival found that it generated \$42.3M in direct and indirect spending (excluding fees paid to out-of-province artists and contractors). This included \$27.6M from the festival production, \$1.9M on hotels, \$7.9M on food and beverage, \$1.6M on entertainment and recreation, \$2.8M on retail and \$400,000 on transportation.<sup>18</sup>*

*Festival-related spending generated an estimated \$11.6M in wage earnings, \$4.3M in tax revenues (HST, municipal and regional, and tax on foreign companies).*

*The report concluded that the festival was "an operational success. The consensus from the community is that the positive impacts obtained by hosting the event have far outweighed any perceived negative impacts."*

*According to Dave Fortune, Associate Producer of the festival, after just two years it boasts the second largest corporate economic impact in the Sea to Sky corridor.*

*The challenge going forward is how to build on the event's early success. Securing growth – and the benefits that come with it – will require marketing support from tourism bureaus and government, Fortune remarks.*

*"We see significant growth potential from the US and other markets because there are so many more people," he says. "We can get visitors who will spend a thousand dollars in a weekend."*

## **CULTURAL DEVELOPMENT AND ARTISTIC GROWTH**

Success begets success. In the case of music, that means a thriving music sector creates more opportunities for artists to develop their talent and their careers.

The Music Cities study found that, "Access to the various supporting professionals, and the training to improve their craft and knowledge of the business enables more artist entrepreneurs to advance from hobby to career. In addition, more live performance opportunities, in high quality venues of the appropriate size for the stage of their career, and in front of engaged audiences, help artists hone their skills."

## **SUPPORTING GROWTH IN BC'S TECH SECTOR AND OTHER INDUSTRIES**

The Information and Communications Technology Council (ICTC), a Canadian centre for expertise on the digital economy, confirmed that there is a link between a vibrant music scene and the retention and attraction of creative workers, particularly a skilled ICT workforce. ICTC further confirmed that music education is a foundational piece of music scenes and also critical for skills development. Their research was based on interviews with technology workers and companies, as well as economic analysis, and highlights the success of cities like Austin and Kitchener, Ontario in utilizing music to attract companies and talent.

Richard Florida, in a Washington Monthly article adapted from his book, "The Rise of the Creative Class," called music scenes "a critical element of a thriving creative centre."<sup>20</sup> He argues that the well-educated and talented young people who form the backbone of the creative industries are drawn

*"ICTC confirms, based on its significant research in the ICT ecosystem, that there is a strong correlation between vibrant music scenes and tech clusters. This leads to the conclusion that governments and organizations that support rich cultural environments are better positioned to attract employers in the high-tech sector, thus providing more high-paying, skill driven jobs for their citizens."*

*- Jeff Leiper, former Chief Policy Advisor, Information and Communications Technology Council (now an Ottawa City Councillor)<sup>19</sup>*

A thriving local music scene naturally attracts music-related talent and investment. It also plays an important role in attracting talent and investment outside of the music industry, most notably in the technology and creative industries.

to places with a vibrant arts and cultural scene., Intense global competition for that talent – and investment – makes these qualities all the more important. In this way, a strong music sector in BC can be an important driver of the province's

burgeoning tech sector and the high value-added jobs it creates.

These benefits extend to communities across the province: Vancouver, Victoria, Prince George, Kelowna, Squamish/Pemberton, Nelson, Salmo and many others.

"A strong Arts and Culture scene, including a vibrant live music component, is vital in keeping academic and trade professionals in the north who want to live here, have a family and enjoy the things you find in a larger urban centre," says Sue Judge, Executive/Artistic Director, Prince George Folkfest Society and Coldsnap – the prince george winter music festival.

## **BRAND BUILDING**

Closely related to the benefits music brings to tourism and talent attraction is its power to build and shape a city or province's brand. In some cases music is central to the brand: Nashville, for example, is "Music City" and Austin is the "Live Music Capital of the World." More often, however, music plays a supporting role in a destination's brand, for example in Liverpool, England and Berlin, Germany, where music is a key, but not exclusive, tourism draw.

"People who love music will travel to experience it in new places," says Andrew Weir, Vice President

of Tourism Toronto.<sup>21</sup> Music's status as an important tourist draw is now well understood by the organization, which presented Music Canada with its 2014 President's Award in recognition of its efforts to promote the value of music tourism to the city.

Building an effective music tourism brand is key to securing that value. According to the Music Cities study, "Music branding not only helps to draw music tourists, but it adds a 'cool' factor to a city that can accelerate other benefits such as attracting and retaining investment and talent."

As a tourist destination, BC is renowned for its natural splendor of seascapes and snow-capped mountains. There is potential for music, along with other arts and cultural offerings, to be added to the province's tourism brand. International stars like Bryan Adams, Sarah McLachlan and Michael Bublé, whose links to BC are well-known, give the province a head start on this path. Development or enhancement of live music activity and, in particular, music festivals, would build on this existing foundation. In fact, BC's festival scene enjoys a longer season than many other parts of the country.

Music festivals and promoters are natural partners in this effort and as music festivals take place in almost every corner of BC, in both rural and municipal settings, the benefits would be province-wide.





Coleman Hell | Photo courtesy of Tim Saccenti

# VI

## CHALLENGES FACING BC'S MUSIC INDUSTRY

*“As a young musician, British Columbia was a great place to start out. It had lots of venues to play and it was receptive to live music. That local music scene and the fact that it was thriving on its own, was a big part of my being able to create music and actually pay my rent! However, things have changed and we need to make sure we have a system in place for future young musicians and artists to develop in B.C.”*

*- Bryan Adams*

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**B**ritish Columbia's music assets are at risk. Massive, worldwide changes in the ecology of the broader music industry over the past decade have undermined the health of the music economy in BC. Other Canadian jurisdictions have responded with new provincial and municipal policy initiatives, thereby amplifying the stresses on BC's music sector.

While these stresses are felt throughout the sector, they most acutely and immediately impact the province's recording studio infrastructure. For the vast majority of BC music businesses, it is tougher than ever to thrive – and in some cases survive – and to compete. Inevitably, of course, this trickles down to people. For music professionals in the province, this means fewer jobs. For entrepreneurs, it means diminished opportunities. For BC artists, it means a tougher time than ever earning a living from music – even more so for young emerging artists, who today face high barriers to getting a start. Inaction will almost certainly result in a continued decline.

This section of the report examines the BC music sector's current situation, the underlying causes and their effects.

## **CHANGES IN THE GLOBAL AND NATIONAL MUSIC ECOLOGY**

It is often said that digital technology has changed the world. For the music sector, the changes have been nothing short of revolutionary since the advent of the file-sharing service Napster more than 15 years ago. The digital wave precipitated a massive erosion of the legitimate music market, a proliferation of businesses facilitating illegitimate online activity and shifts in consumer habits. The CD and other physical music formats that for many years had formed the cornerstone of the recorded music industry – and artists' incomes – fell into a steep and inexorable decline as the illegitimate music market exploded, and albums were replaced by lower-priced digital singles. Recorded music sales and artist earnings declined in lockstep.

In Canada, retail sales of recorded music declined by 51.2 percent between 1998 and 2006, from about \$1.5B to \$703.6M.<sup>22</sup>

Canadians have never had more choices than they do now on how to access music – CDs, vinyl, numerous digital streaming services, radio, YouTube, satellite and more – and where and when



Photo courtesy of Nimbus School of Recording & Media

to enjoy it. Yet today it has never been harder for artists to earn a living from recorded music. According to IFPI's 2013 annual report, up to one-third of Internet users regularly access unlicensed music sites – sites that provide no compensation to artists for the use of their music.

While most streaming music services and other legitimate sites pay royalties, the amounts are a pittance – far below what would constitute a living wage, even for popular artists. Bette Midler drew worldwide attention in 2014 when she reported that Pandora paid her just over US\$114 for more than 4 million song plays over three months. According to Billboard, "That would mean for each

This dilemma, faced by artists and those who support and invest in their careers today, is behind the solutions offered in this report.

### **ADDED EXTERNAL PRESSURES**

One of the key differentiators from jurisdiction to jurisdiction, is how governments, policymakers and music sector stakeholders have responded to the ongoing changes in the music ecology.

Quebec's provincial government has long provided relatively generous policy and financial support to its creative sector, including music. While language and cultural differences with English Canada

*Bette Midler drew worldwide attention in 2014 when she reported that Pandora paid her just over US\$114 for more than 4 million song plays over three months.*

digital radio airplay she earned a rather microscopic micropayment of .00002733076 cents per track.<sup>23</sup>" (Pandora, in response, said it paid more than \$6,400; whatever the truth, the figure is still very small relative to the song's extensive play).

Another source of artist income, live music, falls far short of filling the gap caused by the decline in recorded music sales. The rarified top echelon of stars can make up part of the difference with live music along with royalties from radio play. For many members of the artist middle class, however, income from those sources is negligible.

No corner of the world, BC included, has been immune to these forces. BC artists, music professionals and music businesses experience the impact every day. Their future is at risk.

make it difficult to draw direct comparisons, it is reasonable to conclude that the province's music sector – the second largest in the country – has fared better than it otherwise would have in the absence of support.

More recently, the Ontario Music Fund (OMF) has created a wide gap in the financial resources available to the music sector in Ontario and BC. Some specific impacts of this gap are described further below in this chapter.

The OMF was launched in 2013, with the objective of stimulating growth in the province's music industry. It provides financial support in the form of direct funding to music companies (including record labels, music publishers, music managers, artist entrepreneurs, music promoters, live music

presenters, and booking agents), as well as music industry trade, service, event and training organizations.<sup>24</sup> Funding recipients are eligible for up to a 50% rebate on costs associated with recording, music video production and marketing in the province of Ontario. Industry development projects can qualify for a grant to cover up to 75% of eligible costs.<sup>25</sup>

An expressed goal of the OMF is to “position the province as a leading destination for live music and music tourism.”<sup>26</sup> The Ontario Government reported that, as of June 2015, support from the OMF helped to create or retain 2,000 jobs and generate \$24M in additional revenue for music-related businesses.<sup>27</sup>

An unintended consequence of these benefits is that the fund appears to have negatively impacted competing jurisdictions including British Columbia. BC music sector stakeholders interviewed for this report say music businesses, artists and professionals are being lured away from BC.

An August 2014 PricewaterhouseCoopers profile of the BC music industry, commissioned by Creative BC, concluded that “The Ontario Music Fund (OMF) is attracting BC talent and businesses, which are relocating or expanding to the Toronto area.”<sup>28</sup>

While the study found that most BC music businesses intended to maintain BC as their base of operations over the next five years, the situation has changed since the report was published. The OMF has since become a permanent grant program. Members of BC’s music sector indicate that the impact has been significant.

“Vancouver has made some amazing records and some very talented people live here because they love this place, but that talent is sitting there

unused,” says Garth Richardson, a Vancouver music producer and co-founder of the Nimbus School of Recording & Media. “If I were 30, I’d be moving back east. It’s harder and harder to earn a living doing this here.”

Bruce Allen, the legendary Vancouver-based manager of Bachman-Turner Overdrive, Loverboy, Bryan Adams and Michael Bubl , remarked, “The Ontario Music Fund enables labels to invest in acts. BC, which has always produced our countries’ biggest acts, is being left in the lurch. Studios are suffering, major artists are looking further afield and young musicians, future engineers and producers are being left out in the cold with no future.”

## **BC’S MUSIC SECTOR AT RISK**

### **RECORDING STUDIOS**

BC’s recording studios are the canary in the coal mine of the province’s music sector. For several years, they have faced pressing financial challenges that only seem to worsen with each passing year. Fortunately, most studios are still standing, and their owners and managers express a strong commitment to get them back on solid ground. But in the current environment, the task is daunting.

As with recording studios everywhere, they face pervasive competition from relatively low cost, do-it-yourself digital recording equipment used today by many artists, who themselves operate on threadbare budgets. Record labels still support some emerging artists’ recording costs, but the availability of funds for these activities has declined in line with revenues.

“Every recording studio in town has had to lower their rates,” Richardson says.



Overlaying these challenges is stiff competition from Ontario recording studios, where up to 50% of recording costs can be recovered through OMF funding.

Paul Silveira, Manager and Head Engineer of Armoury Studios, remarks, "This is urgent. We can't compete with a 50% subsidy. It's way too much, especially when we already have low rates because of other industry issues."

Allen notes that while local superstars like Michael Bublé can afford to continue recording in Vancouver, BC-based acts like 54-40 and Jann Arden have no choice but to travel to Ontario because of the discount.

With dwindling resources, a growing number of BC studios are falling into disrepair, and some are at risk of closing altogether. Richardson remarks, "The studios are having a hard time maintaining their gear because they don't have the funds. It's getting worse and worse. The infrastructure of recording is dying."

## MUSIC PROFESSIONALS

As the BC music sector's fortunes decline, work for engineers, artist managers and other music

professionals is drying up. This has resulted in an out-migration of talent to other jurisdictions, where there are more work opportunities. Nowhere is this more evident than at recording studios.

While a critical mass of professional talent remains in place, a significant concern for BC's music sector is reaching a point where there are too few of the skilled people music businesses need to function.

"The loss of talent is very worrying," Silveira says. "Producers, engineers and others have moved from BC to Ontario and LA. But they'd come back if there are opportunities here."

## LIVE MUSIC AND FESTIVALS

*"Artists have no career if they have nowhere to play or record. There's a big hole. In BC, we need to ask: how do we cultivate art and culture? How do you get the most bang for your buck?"*

*- David Vertesi, member of Hey Ocean!, and a songwriter, musician, producer, artist manager, A&R scout and event organizer.*

In today's era of online piracy and low margin digital formats, artists and music businesses look to live music and music festivals to fill the income gap. The reality, however, is that very few artists can earn a living exclusively from live music.

The challenges are particularly steep for BC artists and music businesses. The province's relatively small population is insufficient to support most artists' live music careers on their home turf alone. Moreover, BC's vast geographic area, with communities separated by mountain ranges, sea and distance, can make the cost of touring prohibitive.

For artists seeking to venture outside the province, the challenges are even more daunting. The distance from Vancouver to the closest major Canadian city, Calgary, is vast. The time and dollar costs of travelling there – and beyond – are accordingly high.

Added to this are barriers to a more successful live music and festival scene. Music festivals and live music venues in the province are hampered by provincial and municipal red tape. Unsurprisingly, many of them are financially marginal. This is exacerbated by sky-high real estate and rental costs in major centres like Vancouver and Victoria, which can make operating a live music venue unaffordable or uneconomic compared with other uses such as condominium development.

Possibly as a result of these barriers, there are relatively few live music venues even in a major centre like Vancouver, with notable gaps in the ladder that carries emerging artists from smaller to larger venues as their careers progress.

"There are not many small and developing venues for artists (in the Vancouver area) as there are at

the big level," says Paul Haagenson, President of Live Nation Canada. "It makes it harder for artists to progress and develop a live culture."

The lack of venues is even more acute in regional centres. According to Sue Judge, "One of the issues we have is a shortage of suitable venues for live music. Existing venues, where they do exist, seem to serve one purpose or another, but there are not many venues that can accommodate different forms of artistic activities."

Even with existing venues, there are considerable opportunities to grow, and thereby drive economic activity, new tourism spending and tax revenues. The Ontario "Live Music Measures Up" study confirmed the importance of securing live music and festival growth. The survey found that nearly half of the venues surveyed operate at 50 percent capacity during a typical weekday performance, and none indicated that their venues were at full capacity during typical weekend performances.<sup>29</sup>

In BC, any investment in live music would leverage currently unused capacity and the province's well-established festival and not-for-profit music networks.

## **BARRIERS TO SUCCESS, OPPORTUNITIES FOR GROWTH**

Several key barriers to the success of live music and festivals were identified in the interviews and research for this report. These are identified below. Action to remove these barriers would create opportunities for growth; recommendations for this are outlined in the next chapter.

*“The Capital Region could benefit from a unified voice that would identify geographic and regulatory challenges that the local music community currently faces. Other cities have had success with music advisory boards, such as Seattle’s Music Commission. Something like this could be an opportunity for a regional integrated approach serving as a catalyst for the local music economy.”*

*– Darb Erickson, City of Victoria*

Provincial barriers can be summarized as:

- Provincial liquor licensing rules that impose maximum pricing restrictions and exemption protocols for liquor sales.
- Restrictions on for-profit entities such as festival producers to apply for and hold large scale special event licences.
- The PST pre-payment requirement that applies to music festivals.
- A lack of provincial support needed to stimulate foreign direct and local private investment in live music performances, and thereby enhance the BC music sector’s competitiveness.
- A perennial shortage of financial resources for cultural activities in regional centres.
- Overly restrictive venue licensing requirements.
- Noise rules that do not accommodate pre-existing uses such as music venues in locations undergoing condo development and gentrification.
- Overzealous and inconsistent enforcement by municipal bylaw, fire and other inspectors who sometimes force outright closures when alternatives such as work orders or fines may be more appropriate.
- A lack of municipal funding for music and the arts.

## ARTISTS

Next to recording studios, no part of BC’s music sector has been as heavily impacted as artists by changes in the broader music ecology. The challenges outlined above result in:

- An increasing number of artists leaving BC to record and work elsewhere, either temporarily or permanently.
- Fewer opportunities for success within BC and beyond for talented young BC artists.
- A lack of affordable living, rehearsal and other music spaces especially in BC’s main music centres, Vancouver and Victoria.

More pressure has also been placed on festivals and promoters who book international acts as part of their line-ups as a result of the declining value of the Canadian dollar. With most international acts booked in US dollars, the cost of bringing international acts to the market has skyrocketed.

Municipal barriers vary from community to community. Some of the key barriers identified include:

*“If you want to live in the city, it’s almost necessary to work a full time job because the cost of living is so high. We rehearse three to five days a week and one of our band members works a full time job. In Montreal, you can afford to not work full time. As a result, there is less time to create in Vancouver.”*

– Katrina Jones, *The Belle Game*

The drop in artist incomes can affect music businesses like recording studios in unexpected ways. Garth Richardson notes, for example, that band members today have to work during the week to earn a living, so they can only record Friday night through Sundays.

Katrina Jones says she and her bandmates want to stay in BC, but she is open to moving to Ontario. “Ontario funding through the OMF has a big effect. OMF funding is definitely something that is very appealing about the Ontario music scene.”

What no one can predict is how long BC’s pipeline of young talent will persist when it is so hard for them to earn a living in the province. “Looking at the artist ladder, just when an artist is starting to achieve success that can impact the economy, they go elsewhere to get the support they need,” says Mike Schroeder, CEO, Nimbus School of Recording & Media. “As a result, we’re losing the cream.”

“I wouldn’t want to be in a young band now – it’s really, really tough,” says Bruce Allen.

## **OTHER ISSUES**

A lack of adequate funding and other support for Music BC, the province’s music association,

has hampered its capacity to advocate for the sector and advance meaningful solutions to its challenges. Another issue, the decline in music education, undermines the sector’s foundation, with far-reaching future consequences. Both of these issues, along with the dearth of artist entrepreneur training, are explored below.

## **SUPPORT FOR MUSIC BC**

Music BC, the recognized voice of the province’s music sector, needs more support to be fully effective. There are two principal areas where support for the association falls short: funding, and the active participation and involvement of BC’s music community.

Many of the individuals interviewed for this report cited the lack of cohesion and cooperation among BC music sector participants as a contributing factor to – and in some cases, a result of – the sector’s decline. This was contrasted with the vocal, organized and well-funded representation of other creative industries, notably the film and television sector.

“A challenge is that we got to a point where the industry became fragmented says Scott Johnson, President, Music BC. “Thankfully there’s been a strong desire in the community for change and to



work together, and as such we are making our own changes to address those needs for the BC music community. We have immense talent in this province, and it is imperative that we not only have the resources to continue to develop this talent, but we have the infrastructure in place to ensure we have a strong, sustainable and vibrant music industry in BC for many years to come."

Jonathan Simkin, President of 604 Records, remarks, "We might be able to mobilize people to get things done if there was more cohesion in the local music community. There's something to be said for having an organization that could play a central role in taking the message to government. There isn't a BC industry per se – there's a bunch of individuals working in music individually and separately."

The importance of music community collaboration and support was highlighted in the Music Cities study. "(I)f there is no consensus and collaboration in the music community, it is inevitably harder for governments to understand the unique challenges faced by the sector, and governments will be far less motivated to make positive changes," the report states. "A divided community discourages political action because policy decisions are unlikely to receive clear and broad support from the people affected."<sup>30</sup>

Music community collaboration was key to the creation of the Toronto Music Advisory Council and the city's Music Sector Development officer position, as well as a provincial Live Music Strategy and Ontario Music Fund, according to Music Canada President Graham Henderson.

*"The central findings of our research ... indicate that music is playing an important role in Canada's success in the global digital economy."<sup>31</sup>*

*- Jeff Leiper, former Chief Policy Advisor, Information and Communications Technology Council*

## MUSIC EDUCATION

Music education has long been in decline in schools across the country. Provincial government spending restraints in BC have led to difficult budget choices. One of the areas affected by this is school-based music education, which has faced a growing shortfall of resources.

For example, in May 2015 the Vancouver School District announced that it would begin postponing

## NON-PROFIT SCHOOLS DELIVER MUSIC'S TRANSFORMATIVE POWER TO AT-RISK KIDS

*Many families turn to private music lessons for their children to make up for shortcomings in school music programs or to supplement them. For children from under-served and at risk populations, however, this is not an option.*

*Privately funded, non-profit institutions like Vancouver's Sarah McLachlan School of Music and Saint James Music Academy are filling the void.*

*The Sarah McLachlan School provides free, high quality after-school music education to hundreds of at-risk and underserved kids and older adults who otherwise would have no access to music education. Similarly, Saint James brings music education to 450 Vancouver inner-city children with limited or no access to quality music programming. In addition, the Coastal Jazz and Blues Society runs music education and outreach programs for more experienced students.*

*Sarah McLachlan, like Saint James founder Kathryn Walker, founded her school after seeing the impact of cutbacks in school music programs. Both schools, as well as Coastal Jazz and Blues Society programs, are funded through private donations.*

*McLachlan's school is a shining example of how musicians and other music professionals can give back to their communities and share the transformative power of music.*

*"Teaching music is at the core of what we do, but the school goes far beyond that," McLachlan says. "The moment kids enter our doors, they enter a safe and nurturing environment that encourages self-expression. Learning music is a great way for kids to acquire life skills and gain the confidence to succeed."*

*To maintain their high quality standards and reach as many at-risk kids as possible, programs like McLachlan's school and Saint James need financial support. As such, they would be ideal targets for government support.*

**To learn more about these programs and how to support them, visit them at [www.sarahschoolofmusic.com](http://www.sarahschoolofmusic.com), [www.sjma.ca](http://www.sjma.ca) and [www.coastaljazz.ca/education](http://www.coastaljazz.ca/education)**

music programs by one year as a cost-cutting measure. As a result, Vancouver band programs begin in grade six instead of five, and strings programs are delayed until grade five.

Steve Sainas, a music teacher at Terry Fox Secondary School in Port Coquitlam, says that funding for music education, especially at the elementary school level, has been on a steady decline for the past decade and as a result has significantly atrophied many music programs at higher grade levels. In consultation with his colleagues, he reports that his school district is inconsistent in the delivery of music programs at both the elementary and middle school levels.

Sainas reports that elementary schools in his district are seldom staffed with music teacher specialists. Students typically receive music instruction just once or twice per week for 30 minutes per session, or not at all. In some elementary schools, regular classroom teachers offer music appreciation units as the only form of music education. Some elementary schools offer user-pay community music programs after school hours.

Middle school programs are also very inconsistent from school to school, Sainas says. Depending on how each middle school timetable is organized, most middle school students in his district receive just 6-10 weeks of music instruction per year, which on average totals 30-50 hours of instruction time. Some schools also provide optional music programs outside regular school hours.

At Terry Fox Secondary School, Sainas runs an innovative high school music program that offers courses in Rock School, Recording Arts and Guitar for students in grades 9 to 12. Despite its enormous popularity, with an annual enrollment of more than 200 students, the program receives just \$250 a

year in school funding. As such, it depends almost entirely on funds generated by end-of-semester concerts, which raise \$6,000-\$8,000 annually from ticket sales, to purchase music instruments and other equipment.

The 2010 study, *A Delicate Balance: Music Education in Canadian Schools*, found that "funding for music education has decreased in many schools while student participation has been rising."<sup>32</sup> Not surprisingly, the study identified funding for music programs as one of the top three challenges facing music programs across the country.

This trend is set against the backdrop of numerous studies linking music education in schools to a range of benefits including improved academic results and strong technology and creative sectors. Inevitably, declining music education will also undermine the development of the talent pool from which the next generation of BC artists is drawn and could ultimately weaken the province's future music fan base.

"(H)ealthy music programs in schools, from the early school years on, contribute to the development of the innovative and skilled workforce required in the digital economy."<sup>33</sup> says Jeff Leiper, former Chief Policy Advisor, Information and Communications Technology Council, in his study, *'Music – a Catalyst for Technology Hubs and Innovative Talent'*. "There is growing evidence surrounding the impact of music education, not only on the development of soft skills or personal strengths, but also on hard skills, such as math, logic and cognitive processing that are most important in highly innovative sectors such as technology and digital media."

The flip side is that inadequate music education could negatively impact students' overall academic achievement along with their acquisition of the

skills and competencies needed to succeed in the digital and creative economies.

"Music keeps kids in class and in school," asserts Garth Richardson, who cites holes in music education as the main inspiration for starting the Nimbus School. "The reason Bob Ezrin and I opened up the school is that kids were learning nothing about working in music. We believe it's important because music has the ability to transform how people think and feel."

According to Sainas, the benefits of music education are universal.

"It keeps at-risk kids in school and keeps gifted kids stimulated," he says. "In today's society, with a high frequency of anxiety and depression, encouraging involvement in music is essential. For the kids in my class who suffer from anxiety, it's music that helps them stay in balance."

Music education also enhances skills in team building, problem solving, creative thinking, and self-directed learning, which are all foundational life-skills that build the self-confidence needed to succeed in all career paths.

The Canadian Music Education Research Cooperative links healthy music programs to a healthy arts sector: "While healthy music programs are essential to the continuation of a dynamic and vital society, music education serves to educate and support creators of, performers and responders to music. In addition to its importance in societal health and well-being, the arts industry represents a significant component of the Canadian economy and the role that music education plays in maintaining the arts is vital."<sup>34</sup>

## ARTIST ENTREPRENEURSHIP TRAINING

The transformation of the music ecosystem has led to a massive decline in the resources available to support new and emerging artists. Previously, music labels had the capacity to provide generous financial and professional support to a large number of young artists. This included recording, management, marketing, promotion and more – virtually all of the resources needed to help get a music career off the ground.

The music industry continues to invest more of its revenues in A&R (its version of research and development) than other comparative industries.

Photo courtesy of Cogito Ergo

CogitoErgoShoot.com



(Figures collected by the European Commission showed A&R spending equal to 15.6% of revenues in 2013 – proportionately higher than R&D spending in traditional research-based sectors such as pharma, software/computers and technology hardware<sup>35</sup>). Yet, because of the sharp drop in music industry revenues, fewer artists have access to that type of support, and those that do receive it get far less than before.

This has given rise to the do-it-yourself era of music, in which the vast majority of artists record, distribute and market their own music with little or no outside support. This imposes huge demands not only on their time, but also on the extra skills they need to earn a living from their music, and succeed.

Artist entrepreneurship training can help fill the skills gap. The widely acclaimed and privately funded Peak Performance Project focused in part on teaching artists entrepreneurial skills. However, the initiative concluded in BC in late 2015 and there is no replacement in sight.

As a result, currently there is no place for young BC artists to access the training they require.



Photo courtesy of Nimbus School of Recording & Media



## CASE STUDY: PEAK PERFORMANCE PROJECT PUTS EMERGING ARTISTS ON STAGE

*The PEAK Performance Project is an artist development program created in 2009 by 102.7 The PEAK in association with Music BC. Funded through The PEAK's CRTC Canadian Content Development funding commitment, the Project provided \$7M in educational, marketing, promotional and funding support to emerging BC artists over seven years, until late 2015. A separate PEAK Performance Project continues to operate in Alberta.*

*The Project was designed to help artists succeed in today's challenging environment, providing them with the skills and funding needed to develop their talent and careers. Artists chosen to receive Project support were required to demonstrate both talent and business acumen.*

*In its first five years in BC, the Project nurtured artists who later won two JUNO Awards, and produced 14 albums, 15 videos, and 29 tours in North America and beyond. Twenty-one of them succeeded in obtaining FACTOR funding. Dear Rouge is counted among the PEAK Performance-supported bands.*

*According to the Project's five-year review, it "has provided BC with its own star system to introduce new and emerging artists to the world." The review called the Project "the right program, at the right time, in the right place."*

*Tamara Stanners, Executive Director, PEAK Performance Project and Program Director of 102.7 The Peak FM expresses concern about the future for emerging BC artists now that the Project has concluded.*

*"Without it, it's going to leave a major hole," Stanners says. "We can't compete and we don't want to lose an industry we've worked very hard to create here."*

*Stanners would like to see a similar program take the place of the PEAK Performance Project, possibly with provincial support.*

*"To have a grant system where artists of all genres can learn their craft and become better songwriters and performers would be great," she says. "Recording, songwriting and live performance on their own aren't enough. You need it all, along with funding."*

# VII

## **GETTING BACK ON TRACK: RECOMMENDATIONS TO SECURE THE BENEFITS OF A STRONG BC MUSIC SECTOR**

*The critical mass of elements needed to rebuild a thriving, competitive music sector in BC are in place. But, as noted in Chapter II, these raw materials – artists, music professionals and music businesses of all sorts – have been deeply eroded and are currently at risk. The need for action is urgent.*

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**T**here is no single solution, nor any single player. Getting the BC music sector on track to achieve its full potential, and thereby become a significant, positive contributor to the province's economic and cultural life, will involve comprehensive, innovative policy initiatives at both the provincial and municipal levels; a modest investment by the provincial government; collaboration and leadership within the music sector itself; and the active involvement of key stakeholders such as the BC Chamber of Commerce.

The required actions are straightforward, cost-effective and relatively easy to implement. A comprehensive BC Music Strategy will generate significant dividends, including: job creation and retention; economic growth and diversification; increased foreign direct investment; increased tourism spending; youth retention and attraction; and spinoff talent attraction for BC's tech industries.

Among the principal beneficiaries will be the people who are the foundation of the music community, the artists. In particular, a concerted and well-crafted approach will help lift the next generation of young artists toward their dreams.

The strategy will also bring benefits to every region of the province – wherever there are artists and an audience for their music.

The recommendations below are intended to meet the specific needs of BC and position the Province to compete in an increasingly global marketplace. This is an opportunity to recalibrate the manner in which government interacts with music; to support the diversification of BC's economy; and to harness the power of the music community for the good not only of music, but the citizens of British Columbia as a whole. Moreover, the recommendations reflect the wishes and aspirations of the province's music community.

"I've been doing this since 1966," says Bruce Allen. "We've produced wonderful acts in this country. Now's a completely different time. We need the government to step up. Canadians are proud of their musical heroes, but we need to help our young and emerging talent get over a couple of hurdles and they'll be fine."

BC Chamber of Commerce President Jon Garson voices his organization's support for a comprehensive BC Music Strategy: "In the opinion of our Chamber, this initiative will help to further strengthen and diversify the province's economy, create opportunities for youth employment, and stimulate music tourism."

## **PROVINCIAL GOVERNMENT ACTIONS**

The provincial government has a key role to play as part of broader efforts to revitalize BC's music sector.

The BC government can support a number of policy goals by helping to create the conditions for a stronger music sector: maximizing the sector's potential as a source of economic growth and diversification; expanding music tourism and the "new" dollars tourists add to the provincial economy; cultural development; and extending and reinforcing the BC brand.

Provincial government music initiatives would also support its efforts to accelerate the growth of BC's tech sector and creative industries via the new \$100M BC Tech Fund, increased tax credits and other policies.<sup>36</sup> As noted above, a vibrant music scene helps attract and retain the professionals those industries require to succeed.

By virtue of its pivotal role in regulations and industry support programs, the government is also uniquely positioned to help the music sector overcome some of the major challenges

affecting artists, music professionals, live music and festivals, recording studios, record labels and music education.

Recently, the government has taken some positive steps to improve conditions for the music sector. This includes the reduction of red tape through BC's Regulatory Reform Initiative.

The government deserves applause for this start and is encouraged to continue these efforts through a comprehensive BC Music Strategy that would include a modest investment coupled with some innovative policy initiatives. More specifically, this means a broad-based action plan comprising reduced red tape and regulation; a \$15 million/year investment; and, music education.

To be truly effective, it is essential that the government proceed with a comprehensive action plan as opposed to taking a piecemeal, step-by-step approach. Experience has proven that the most successful music jurisdictions in the world – among them Austin, Texas, Melbourne, Australia and, more recently, the Province of Ontario – employ unified music strategies. A broad-based strategy has the greatest potential to advance the music economy and thereby support economic diversification, garner support from music and business stakeholders and the general public, and

generate positive attention in the music world far beyond BC's borders.

The recommendations for action by the BC government outlined below were developed through the interviews and research conducted for this report, extensive consultations with elected and non-elected provincial government officials as well as insights and input from other stakeholders.

## RED TAPE REDUCTION

The provincial government has recently acted to reduce red tape for music venues and festivals in keeping with its commitment to reduce red tape and streamline government services. Specifically, the government has:

- Streamlined the application process such that one liquor licence can cover an entire event, for a reasonable number of days and venues; and,
- Addressed barriers faced by promoters and venues holding all-ages events, including temporary de-licensing restrictions placed on liquor-primary establishments. The revised Liquor Control and Licensing Branch regulations introduced in 2014 had made it very difficult for certain "liquor-primary" venues to host all ages events.



Photo courtesy of Mark C. Austin

There are additional opportunities to reduce provincial government red tape both in keeping with the aim of stimulating live music activity and the need to respect community standards and the interests of residents and other businesses. The following regulatory barriers in liquor licensing should be addressed:

- Within the existing policies for large-scale, non-profit based Special Event Liquor Licensing, remove maximum pricing restrictions and exemption protocols for liquor sales (now \$5 for a 12 oz. serving) or raise them to current market levels (currently, in order for major events to be exempted from maximum pricing rules, all profits from the event must be donated to charity)
- Allow for-profit entities such as festival producers to apply for and hold large scale Special Occasion Licences (currently, a charity or non-profit must hold a Special Occasion Licence on behalf of festivals, which cannot benefit from liquor sales at their events, thereby decreasing their ability to earn a return); and
- Remove the PST pre-payment requirement (currently, applicants are required to estimate their anticipated liquor sales and pre-pay the 10% PST, thereby straining cash flows).
- It is also strongly recommended that the government consult the live music community in order to develop a comprehensive Music Red Tape Reduction Strategy.

## BC MUSIC FUND

Provincial government investment is urgently needed by BC's music sector, and would be uniquely impactful as part of a comprehensive music strategy. A BC Music Fund will stem the outflow of talent, resources and activity to other regions.

A well-designed grant program would stimulate both foreign direct and local private investment in BC's music sector. A detailed analysis of the potential ROI of a \$15M annual fully-refundable tax credit, conducted by Nordicity on behalf of Music Canada, concluded that its total GDP impact would be nearly \$73M from the music business and tourism in BC.<sup>37</sup> This includes total incremental impacts of approximately \$30.1M from BC tourism, \$15.3M from BC's live performance sector, \$7.5M from BC-based music businesses, \$11.4M from non-BC-based businesses, and \$8.3M from BC recording studios.<sup>38</sup>

The study also found that a tax credit would generate approximately \$20.3M in incremental tax revenues including about \$10.2M in tax payments to the Province and municipalities. In tourism, the tax credit would lead to the attraction of almost 37,000 new visitors to BC and incremental spending of \$17.2M directly in live music. In addition, more than 1,300 full-time equivalent jobs, and almost \$45M in labour income, would result.<sup>39</sup> A grant program would be expected to generate similar returns.

The provincial investment would be applied in the following categories in order to direct support to the areas of greatest need and generate optimal

***“Investing money in the arts and entertainment business sector has proven to show significant returns, especially in tourism.”***

*- David Fortune, Associate Producer, Pemberton Music Festival and General Manager of Touring for Huka Entertainment*

benefits as outlined in Chapters V and IV: sound recording; live music performance; distant location tour development; program for capital investments in music companies; music tourism strategy; and industry development. A portion of the funding should be apportioned to regional centres.

Detailed recommendations are proposed for each category:

### 1) Sound Recording

i. Eligible applicants would include independent record labels domiciled in British Columbia, the major multinational record companies (Sony Music Entertainment Canada, Universal Music Canada and Warner Music Canada) and recording studios domiciled in British Columbia which:

- Are not exempt from tax;
- Are not controlled by another person or corporation that is exempt from tax;
- Conduct 75% or more of their business in sound recording activities; and,
- Bear the financial risks associated with their business, or are related to a company that bears the risks.

ii. Eligible activities would include:

- Recording production costs which occur in British Columbia (including studio rental costs, artists' royalties, musicians' session fees, remuneration to producers, recording engineers and technical staff, graphics, digital scanning, programming, and testing), for recordings made in a facility in British Columbia;
- Production costs for music videos made in British Columbia;

- Direct marketing and promotion expenditures for sound recordings produced in British Columbia (including direct costs of advertising, creation and production of promotional materials, online and mobile marketing, and event costs for events that are solely intended to market the release of a recording produced in British Columbia;
- Travel and hotel costs for artists and musicians, crews and professionals, required for the above sound recordings and music videos; and,
- Employment costs directly related to the management of the above recording projects and marketing campaigns.

### 2) Live Music Performance

i. Eligible applicants would include domestic and foreign-controlled music promoters and presenters (for profit and not for profit), including venues with a permanent establishment in British Columbia.

ii. Eligible activities would include:

- The direct costs associated with developing, programming, and promoting live music experiences in British Columbia.

### 3) Distant Location Tour Development

In light of the financial burden for BC artists of touring to and from distant locations to build a fan base, tour support would be provided.

i. Eligible applicants would be BC artists, and domestic and foreign-controlled music promoters and presenters.

ii. Eligible activities would include:

- Direct tour costs (including transportation by road, air or ferry) of BC artists, and their supporting crews, within and in close proximity to BC.

#### 4) Program for Capital Investments in Music Companies

i. Eligible applicants would include existing or proposed live music venues (where live music is the primary activity), recording and mastering studios and outdoor stages used primarily for live music presentation.

ii. Eligible activities would include:

- Sound mitigation measures;
- Improved technology and sound systems; and,
- Redevelopment of unused or underutilized spaces for creative purposes.

#### 5) Music Tourism Strategy

i. In a program led by the Province, music and tourism stakeholders will be guided in the development of a music tourism strategy that:

- Identifies and catalogues existing music tourism assets and events in order to develop greater audience engagement;
- Develops a music tourism brand for marketing campaigns;
- Incorporates music into tourism marketing campaigns for British Columbia; and,
- Establishes a standard of measurement to capture results.

#### 6) Industry Development

i. Eligible applicants would include BC music industry associations, Music Canada and artist

management companies.

ii. Eligible activities would include:

- Business development that expands the capacity of these organizations;
- Export development activities;
- Research; and,
- Artist entrepreneur training.

*“BC is a beautiful tourist destination. Why isn’t it a music destination? BC could add a new product to its product line and leverage its existing tourism infrastructure. We can also sell Vancouver as a destination for music students, recording artists and other music activity.”*

*- Mike Schroeder, CEO, Nimbus School of Recording & Media*

#### MUSIC EDUCATION

School-based music education and career path development, as part of a comprehensive BC music strategy, are important policy areas for provincial government consideration.

The links between music education and overall academic results and strong technology and creative sectors are well established. Studies have found that, among other benefits, students in high-quality music education programs attain higher standardized test scores and higher English

test scores than students in schools with low-quality music programs.<sup>40</sup> Music education is also the foundation for developing the next generation of BC artists and music fans.

Accordingly, the Province should examine the current state of music education and career development and identify opportunities to ensure access to programs in every region of British Columbia.

This would involve establishing a Blue Ribbon Task Force that will bring together a range of expertise from government, the education sector and the music industry to:

- Identify existing community-based music education programs and professional training programs, and identify areas of weakness;
- Work with music educators to strengthen music education by identifying opportunities for public and private sector support along with public-private school board partnerships; and,
- Assess the level of in-school music education currently offered in the province and, in coordination with the Ministry of Education, School Boards and music educators, set targets for high quality music education.
- Ensure that all of these activities extend to rural and remote communities, First Nations communities, and to disadvantaged youth.



## CASE STUDY: AWARD-WINNING TEACHER ROCKS MUSIC PROGRAM

*Steve Sainas, a music teacher at Terry Fox Secondary School in Port Coquitlam, is an inspirational, one-man testament to the value of music education. Since its introduction in 2000, Sainas's Rock School and Recording Arts Program has inspired many students to follow their dream of recording and performing music, pursue careers in recording engineering, broadcasting and entertainment management, and advance their education in post-graduate music programs.*

*From 25 Rock School and 16 Recording Arts students in its first year, the program has expanded to more than 200 students. In addition to helping prepare students for careers in music, the program is respected for being inclusive. At-risk youth, the learning disabled, the physically disabled and the gifted alike are welcome in Sainas's classes.*

*"Without him, hundreds of kids would have not been exposed to the deeper facets of their passions," Riley Zaporozan, a former student and now a student at Nimbus School of Recording and Media, says in a testimonial posted on Nimbus's website.<sup>41</sup> "To him I am truly grateful because of the encouragement I received to pursue my goals inside and outside the classroom."*

*Rock School students form their own rock bands. At the end of each semester, they put on rock shows which double as a final exams and, at \$5 per ticket, generate funds to maintain and buy new music gear (the concerts can be seen online at [www.rockthefox.ca](http://www.rockthefox.ca)).*

*Sainas says his program succeeds in large part because he allows kids to play music of their own choice, and supplants traditional theory-based instruction with music playing and performance. Each class is organized as a cross-grade composition of grades 9 through 12, so that the more experienced musicians can mentor the newer members of the program, thus fostering strong team bonds and accelerated learning.*

*As well, his computer lab is an effective supplemental learning resource that gives students free access to online tutorials and tabs, as well as promoting music creativity through the use of digital recording technology. Rather than dangling the carrot of band concert trips to exotic destinations, a tactic used at many schools, Sainas says the music itself is what gets his students involved and engaged.*

*"We entice kids to fall in love with music rather than go on a trip," he remarks. "My kids get to play the music they want, on top end professional equipment."*

*For his tremendous contributions to music education, Sainas was named the MusiCounts Teacher of the Year in 2014-2015. This Juno Award, which recognizes exceptional music teachers whose dedication and hard work help keep music alive for young Canadians, includes a \$10,000 prize and a generous contribution to the Rock School and Recording Arts Program. MusiCounts is a music education charity associated with The Canadian Academy of Recording Arts and Sciences (CARAS).*

## **MUNICIPAL GOVERNMENT ACTIONS**

Municipal governments, through their jurisdiction over land use planning, business licensing, enforcement and other policy areas affecting music, have an important role to play in creating optimal conditions for a vibrant music sector, particularly for live music. Most local policy and compliance issues are applicable to any municipality, large or small, while others – such as music hubs and incubators – are relevant in larger centres such as Vancouver and Victoria.

Municipal-level policies directly affect the sustainability of music businesses, from recording studios to live music venues. This, in turn, affects the people who work in music – artists, sound engineers, promoters and many others. Municipal policies and programs, along with provincial policies and private sector initiatives, can be used to protect existing music spaces, create new ones and build clusters in entertainment districts.

Municipal government action in the following areas would provide the greatest benefits not only to the music sector, but also to local citizens, businesses and the municipalities themselves: land use planning; venue licensing requirements; noise rules; bylaws, regulations and enforcement; cost recovery for municipal services; a music office or officer; and funding for music and the arts.

The impact of some local issues, notably the skyrocketing cost of music and living spaces, is felt most keenly in the Greater Victoria Region and the Lower Mainland. As a result, solutions to tackle those issues are most relevant to those centres. Other policy areas that apply specifically to the Vancouver and Victoria regions are hubs and incubators, and multi-city alliances.

## **1) LAND USE PLANNING**

Competing demands on land and spaces, especially in intensively developed urban settings, make land use planning a particularly challenging municipal policy concern.

In Vancouver and Victoria, property values and rents have ballooned to levels that can be unsustainable for music businesses and artists. Gentrification, along with ever-more intensive residential development, adds to the pressure on live music venues, which can get squeezed out or be deemed as incompatible with housing. Ironically, it is often culturally significant features like these that draw new residents, businesses and developers to a neighbourhood.

Recommendations:

- Developers and municipal staff should be required to take culturally significant sites and clusters into account in land use planning, with the goal of protecting their ongoing viability. Future land, building and unit purchasers should be advised when music venues and clusters are nearby.
- Where significant music clusters exist, or new ones are sought, consider designating special cultural zones to better protect them and to build awareness. Explore applying the “Agent of Change Principle,” where the activities of existing music venues and clusters are protected when new developments are built nearby.
- Noise rules should accommodate pre-existing uses such as music venues and rehearsal rooms, as well as in music clusters, when new residential and business developments are being considered nearby.

- Make short-term, reserved parking spots available near music venues, recording studios and rehearsal spaces for equipment loading and unloading.
- The larger the centre, the more land use planning should take into account the need for a broad range of venues, from tiny back rooms to large stadiums, to support the advancement of artists' careers.
- Examine municipal regulations around the use of underutilized spaces to encourage the redevelopment of them for creative purposes like venues and rehearsal spaces.

## 2) BYLAWS, LICENSING, REGULATIONS AND ENFORCEMENT

Municipal bylaws and business and special event licensing requirements can become an unnecessary barrier to music businesses if the requirements are not balanced and appropriate, or if the application process is too difficult and time-

consuming. Similarly, overzealous and inconsistent enforcement by municipal bylaws, fire regulations and other rules can be disruptive and even make music businesses unsustainable. Numerous news reports reference these issues in relation to live music in BC, though they are by no means exclusive to the province.

### Recommendations:

- Municipal bylaws and business and special event licensing should be reviewed, in consultation with music and other community stakeholders, to ensure they are reasonable, appropriate, and fairly balance potentially competing interests. The application process should be as simple and expeditious as possible.
- Ongoing municipal regulation compliance requirements and enforcement should be applied in a fair, measured and consistent way.

Photo courtesy of KZ Photography



### 3) COST RECOVERY FOR MUNICIPAL SERVICES

Recommendation:

- Municipalities should review how they calculate costs charged to music festival operators for services such as policing to ensure they (i) fairly represent the actual cost of the services and (ii) do not materially affect an event's financial sustainability.

### 4) A MUNICIPAL MUSIC OFFICER

Municipal governments, with their myriad departments, rules and policies that affect music, can be challenging for music businesses to navigate. Many cities of all sizes in North America and around the world, have established a single point of contact for music.

Seattle, Austin, San Francisco, Chicago, London, Hamilton, Montreal and Toronto are among the North American cities with a music office or officer. In larger centres, the officer is typically dedicated full-time to music activity, either within a sole-purpose music office or within the department responsible for economic development or cultural affairs. In smaller cities, such as Kitchener, Ontario, the music officer may be engaged in a wider range of cultural and arts activities.

Recommendation:

- Establish a municipal staff position with the following responsibilities:
  1. Serves as a liaison between music businesses and relevant municipal contacts;
  2. Engages with other municipal departments to ensure policies, regulations and enforcement accommodate the interests of music businesses;

3. Leads the development and implementation of a city music strategy;
4. Acts as a mediator when music activity is perceived to be in conflict with the broader community;
5. Coordinates networking and educational events;
6. Where music advisory boards have been established (see *The Role of Music Stakeholders* below), serves as a liaison with the city and provides administrative support; and
7. Acts as an advocate for music tourism within City Hall and with external tourism promotion bodies.

### 5) MUSIC AND ARTS FUNDING

Recommendation:

- Review municipal cultural activity funding to ensure commercial music artists and businesses requiring support receive a fair portion of available municipal funds.

### **RECOMMENDATIONS FOR VANCOUVER AND VICTORIA**

Building stronger music scenes in the Lower Mainland and Greater Victoria Region presents both unique challenges and opportunities because of their relatively large populations, high concentrations of music activity and elevated real estate costs. As such, certain policy recommendations are appropriate exclusively to those centres. These include:

#### 1) HUBS AND INCUBATORS

Hubs and incubators such as the new BC Technology Industry Association (BCTIA) Innovation Hub are best known as centres of

support for technology start-ups. They are also sometimes established to nurture music, other creative arts and, as in the case of the Coast Capital Savings Innovation Hub at UBC's Sauder School of Business, to propel social venture innovation and entrepreneurship.

Music-specific hubs have already been created in several cities, including Chicago, Nashville, Memphis and Adelaide, Australia, and similar hubs are emerging elsewhere. Music hubs and accelerators bring emerging artists together with the resources and expertise they need to flourish, and provide them with opportunities to nurture their talent. Another approach is to identify music clusters within a city, and to ensure music activities within the clusters gain the regulatory allowances and resources to thrive.

In Vancouver, plans are well advanced for the future Vancouver Innovation Hub in the city's Downtown Eastside, a neighbourhood that boasts the highest concentration of artists and creative entrepreneurs in Western Canada. The new 100,000 sq. ft. facility, created through a partnership between the Vancity Community Foundation and Vancouver Economic Commission (VEC), will focus primarily on providing facilities, programs, mentoring and financing for technology startups and social ventures.<sup>42</sup>

Sean Elbe, Sector Development Manager, Technology at the VEC, says there is an opportunity for BC's music industry to participate in the new hub to foster creative entrepreneurship and access the talent and innovation prevalent in Vancouver's tech and digital sectors. But with the project moving forward rapidly, it is a discussion that needs to occur before the end of 2016, he says. Any interested party would need to begin an engagement in consultation with the VEC and Vancity to be then brought forward to an independent advisory board of leaders assembled to advise the project.

Possibilities proposed by Elbe include housing a creative production hub and an artist development program along the lines of the Peak Performance Project, which recently wound up in BC. Another opportunity is serving as an accelerator for innovative digital music platforms, providing artist and music entrepreneurs with new tools to drive growth in the music sector.

"It would be entirely appropriate to house a creative production hub and/or pre-seed entertainment technology startup accelerator," Elbe remarks. "This is a huge opportunity for the music industry and VEC has world class partners that can help industry access the innovation they need to find growth opportunities."

Recommendations:

- Explore opportunities for a music accelerator within the future Vancouver Innovation Hub. This could take one or more forms including providing production space, an artist development program, mentor network, investment pool and an accelerator for innovative digital music platforms.
- Investigate other opportunities for music clusters, hubs and accelerators in both Victoria and Vancouver. Affordability of rehearsal and other music spaces should be a key consideration of any initiatives in this policy area.

## 2) AFFORDABLE HOUSING

The high cost of living, especially in Vancouver and Victoria, is a significant barrier to young and emerging artists with limited incomes. Because of high living costs, many artists need to earn additional income outside of music, leaving them with insufficient time to create, rehearse and record, as noted in Chapter VI.

Recommendation:

- Consider artist support in affordable housing programs.

### 3) MULTI-CITY MUSIC ALLIANCES

Multi-city music alliances are a relatively new construct, first appearing in 2013 with the inauguration of the Austin-Toronto Music City Alliance. According to the agreement signed by the two cities, Austin and Toronto will “work collaboratively to develop and expand all elements of the music industry, including but not limited to artists, venues, festivals, studios, management and promotion.”

Both cities seek to learn from one another and collaborate in further developing their thriving music scenes as a tourism draw and source of jobs and economic growth.

Vancouver, Victoria, Seattle and Los Angeles are prime candidates for a multi-city music alliance. They are geographically proximate, with excellent transportation links, and each has a strong music foundation that is ripe for further development. The Austin-Toronto alliance, which was created under the leadership of both municipal governments and each city’s music industries, could serve as a template for such an alliance.

Recommendation:

- Working jointly with municipal and music industry leaders, explore opportunities for a multi-city music alliance between Vancouver, Victoria, Seattle and Los Angeles.

## **THE ROLE OF MUSIC STAKEHOLDERS**

No single group has a greater interest in the success of BC’s music sector than the people and businesses who work in the sector, from artists to recording studios. It is incumbent on them to take a leadership role in developing and driving solutions to the sector’s current challenges so that they, and the communities in which they live, can realize the benefits of a revitalized music scene in British Columbia.

This will require change, starting with increased collaboration and coordination among BC’s music stakeholders, and increased support for music industry associations such as Music BC, Music Canada and Music Canada Live, which also represent BC’s music sector under their mandates as national music associations. A scenario where many stakeholders work in silos, focused almost exclusively on their own affairs, is unsustainable in the current environment.

“We all have to work together, not just individually, to sustain the industry here,” says Julie Glover, President, Armoury Studios. “The studios need to help each other and promote Vancouver as a great place to record and mix. We have to show domestic and international clients that we can keep the show on the road.”

Tamara Stanners, Program Director of 102.7 The PEAK FM and Executive Director, PEAK Performance Project, remarks, “We need to get along better, and not have an ‘us against them’ mentality. The more we can all work together, the more we’ll be able to achieve.”

Attaining collaboration in a sector composed primarily of small and medium-sized business, where many operators wear multiple hats and often struggle to earn a living, can be a challenge. However, the difficulties experienced by most BC music stakeholders today, along with the benefits of cooperation and collaboration, should be a catalyst for engagement.

Collaborative efforts are more likely to gain the ears of policymakers and generate support from political leaders, the broader business community and citizens. This, in turn, will improve the odds of obtaining approval for new initiatives to improve the regulatory and business environments for music.

#### Recommendations:

- A key means of achieving greater collaboration is through strong leadership from an effective and well-funded organization advocating on behalf of the commercial music sector. Music stakeholders should explore how they can better support Music BC to represent their interests and in turn generate greater support in the political and broader business communities. National organizations like Music Canada and Music Canada Live can also play a key role in providing leadership and support to the BC industry.
- Establish both formal and informal opportunities for music sector stakeholders to network, build relationships, discuss common issues and gain consensus on solutions. These forums can also be used for mentoring and education of younger artists and music professionals.
- At the city level, music advisory boards are proven and effective vehicles to build links between the music sector, other stakeholders and municipal governments; advocate for their interests on regulatory and legislative matters; and build consensus within local music communities. Often, they serve as the sector's main interface with – and advisor to

– a city's Music Officer. Such advisory boards (or commissions, as they are sometimes called), are well-established in many cities, among them Seattle, Nashville, Paris, Berlin, Melbourne, Toronto and Austin.

- Stakeholders representing a broad cross-section of the music sector should explore establishing music advisory boards in larger BC centres, particularly in Vancouver and Victoria, where there are larger music scenes. Membership should be extended to stakeholders with shared interests such as economic development and tourism professionals.
- A comprehensive research study on BC's live music sector, similar to the 2015 Ontario study, *Live Music Measures Up: An Economic Impact Analysis of Live Music in Ontario*, should be commissioned, with the involvement of Music Canada, Music Canada Live and stakeholders in BC's live music sector. The study would provide data on the sector to inform the development of strategies to maximize its potential.
- Develop creative initiatives, in conjunction with other stakeholders, to build a stronger music scene and BC music brand. This can comprise initiatives both large and small.
- For example, an idea from the City of Victoria's Darb Erickson, is to explore opportunities for local artists to perform on ferry crossings between the mainland and the island. Other cities already have artists performing at their gateways, such as airports. Musicians on ferries could serve a number of purposes: entertaining passengers; emphasizing music as part of the regional tourism brand; and providing passage to touring artists who might not otherwise be able to afford island-mainland trips.
- Another opportunity would be developing a new vehicle to continue the work of the successful and highly regarded PEAK Performance Project, a \$7M, seven-year artist development program that concluded in BC in late 2015.



# VIII

## SUMMARY OF RECOMMENDATIONS

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## **PROVINCIAL GOVERNMENT ACTIONS**

### **RED TAPE REDUCTION**

1. Within the existing policies for large-scale, non-profit based Special Event Liquor Licensing, remove maximum pricing restrictions and exemption protocols for liquor sales (now \$5 for a 12 oz. serving) or raise them to current market levels (currently, in order for major events to be exempted from maximum pricing rules, all profits from the event must be donated to charity).
2. Allow for-profit entities such as festival producers to apply for and hold large scale Special Occasion Licences (currently, a charity or non-profit must hold a Special Occasion Licence on behalf of festivals, which cannot benefit from liquor sales at their events, thereby decreasing their ability to earn a return).
3. Remove the PST pre-payment requirement (currently, applicants are required to estimate their anticipated liquor sales and pre-pay the 10% PST, thereby straining cash flows).
4. It is also strongly recommended that the government consult the live music community in order to develop a comprehensive Music Red Tape Reduction Strategy.

### **BC MUSIC FUND**

5. The provincial government should stimulate foreign direct and local private investment in BC's music sector by creating a fully refundable tax credit or a grant program. The provincial investment would be applied in the following categories: sound recording; live music performance; distant location tour

development; program for capital investments in music companies; music tourism strategy; and industry development. A portion of the funding should be apportioned to regional centres.

### **MUSIC EDUCATION**

6. Establish a Blue Ribbon Task Force that will bring together a range of expertise from government, the education sector and the music industry to: identify existing strengths and weaknesses, work with music educators to strengthen music education, work with the Ministry and School Boards to set targets, and to ensure that all of these activities extend to rural and remote communities, First Nations communities, and to disadvantaged youth.

## **MUNICIPAL GOVERNMENT ACTIONS**

### **LAND USE PLANNING**

7. Developers and municipal staff should be required to take culturally significant sites and clusters into account in land use planning, with the goal of protecting their ongoing viability. Future land, building and unit purchasers should be advised when music venues and clusters are nearby.
8. Where significant music clusters exist, or new ones are sought, consider designating special cultural zones to better protect them and to build awareness. Explore applying the "Agent of Change Principle," where the activities of existing music venues and clusters are protected when new developments are built nearby.
9. Noise rules should accommodate pre-existing uses such as music venues and rehearsal

rooms, as well as in music clusters, when new residential and business developments are being considered nearby.

10. Make short-term, reserved parking spots available near music venues, recording studios and rehearsal spaces for equipment loading and unloading.
11. The larger the centre, the more land use planning should take into account the need for a broad range of venues, from tiny back rooms to large stadiums, to support the advancement of artists' careers.
12. Examine municipal regulations around the use of underutilized spaces to encourage the redevelopment of them for creative purposes like venues and rehearsal spaces.

#### **BYLAWS, LICENSING, REGULATIONS AND ENFORCEMENT**

13. Municipal bylaws and business and special event licensing should be reviewed, in consultation with music and other community stakeholders, to ensure they are reasonable, appropriate, and fairly balance potentially competing interests. The application process should be as simple and expeditious as possible.
14. Ongoing municipal regulation compliance requirements and enforcement should be applied in a fair, measured and consistent way.

#### **COST RECOVERY FOR MUNICIPAL SERVICES**

15. Municipalities should review how they calculate costs charged to music festival operators for

services such as policing to ensure they (i) fairly represent the actual cost of the services and (ii) do not materially affect an event's financial sustainability.

#### **A MUNICIPAL MUSIC OFFICER**

16. Establish a municipal staff position to serve as a liaison between music businesses and municipal contacts, lead the implementation of a city music strategy and act as an advocate for music tourism within City Hall.

#### **MUSIC AND ARTS FUNDING**

17. Review municipal cultural activity funding to ensure commercial music artists and businesses requiring support receive a fair portion of available municipal funds.

#### **RECOMMENDATIONS FOR VANCOUVER AND VICTORIA**

##### **HUBS AND INCUBATORS**

18. Explore opportunities for a music accelerator within the future Vancouver Innovation Hub. This could take one or more forms including providing production space, an artist development program, mentor network, investment pool and an accelerator for innovative digital music platforms.
19. Investigate other opportunities for music clusters, hubs and accelerators in both Victoria and Vancouver. Affordability of rehearsal and other music spaces should be a key consideration of any initiatives in this policy area.

## **AFFORDABLE HOUSING**

20. Consider artist support in affordable housing programs.

## **MULTI-CITY MUSIC ALLIANCES**

21. Working jointly with municipal and music industry leaders, explore opportunities for a multi-city music alliance between Vancouver, Victoria, Seattle and Los Angeles.

## **THE ROLE OF MUSIC STAKEHOLDERS**

22. Music stakeholders should explore how they can better support Music BC to represent their interests and in turn generate greater support in the political and broader business communities. National organizations like Music Canada and Music Canada Live can also play a key role in providing leadership and support to the BC industry.
23. Establish both formal and informal opportunities for music sector stakeholders to network, build relationships, discuss common issues and gain consensus on solutions. These forums can also be used for mentoring and education of younger artists and music professionals.
24. Stakeholders representing a broad cross-section of the music sector should explore establishing music advisory boards in larger BC centres, particularly in Vancouver and Victoria, where there are larger music scenes. Membership should be extended to stakeholders with shared interests such as economic development and tourism professionals.

25. A comprehensive research study on BC's live music sector, similar to the 2015 Ontario study, *Live Music Measures Up: An Economic Impact Analysis of Live Music in Ontario*, should be commissioned, with the involvement of Music Canada, Music Canada Live and stakeholders in BC's live music sector.

26. Develop creative initiatives, in conjunction with other stakeholders, to build a stronger music scene and BC music brand. This can comprise initiatives both large and small.

# IX

## ABOUT THE REPORT CONTRIBUTORS AND ACKNOWLEDGEMENTS

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Music Canada led the research and development of this report in conjunction with music stakeholders in British Columbia.

## **ABOUT THE CONTRIBUTORS**

**AMY TERRILL** is Executive Vice President at Music Canada where she is responsible for government relations, communications and public relations. Amy has been instrumental in Music Canada's efforts to unite a broad coalition of industry members in Ontario in a bid to promote live performance, music tourism and Toronto as a music city. She has also led the organization's research activities since 2010 which have included the publication of *Live Music Measures Up, An Economic Impact Analysis of Live Music in Ontario*; *The Mastering of a Music City, Key Elements, Effective Strategies and Why It's Worth Pursuing*; *The Next Big Bang – A New Direction for Music in Canada*; *Accelerating Toronto's Music Industry Growth - Leveraging Best Practices from Austin Texas*; and *Fertile Ground - Alberta Music Cities Initiative*.

**DON HOGARTH** (Lead Author) is a communications consultant with more than 20 years of experience in public relations and print journalism. Don has extensive consulting experience in the music industry, including with Music Canada. His work there has included contributions to several initiatives, among them copyright reform, the organization's rebranding, and two recent reports, *The Mastering of a Music City, Key Elements, Effective Strategies and Why It's Worth Pursuing* and *The Next Big Bang – A New Direction for Music in Canada*.

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**SIOBHAN ÖZEĞE** (Editor) handles all things communications at Music Canada. Having previously held positions in broadcasting and at FACTOR, in this role she continues to commit herself to the promotion and protection of Canada's vibrant cultural industries.

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Tamara Stanners, Program Director of 102.7 The PEAK FM and Executive Director, The Peak Performance Project

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