



SOUND
DIPLOMACY

VANCOUVER MUSIC ECOSYSTEM STUDY

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

Music Ecosystem Study And Strategic Recommendations
Executive Summary

Presented by Sound Diplomacy
and Secret Study Projects

June 2018

ABOUT THE PROJECT

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

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

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

SECTIONS 2-3

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

SECTION 4

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

SECTION 5

Analysis and consolidated findings across all research sources.

SECTION 6

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

METHODOLOGY

STEP 1: COMPARATIVE ANALYSIS

STEP 2: PLACE RESEARCH

STEP 3: STAKEHOLDER ENGAGEMENT

STEP 4: ANALYSIS OF FINDINGS AND RECOMMENDATIONS

VANCOUVER MUSIC ECOSYSTEM STUDY



EMPLOYMENT AND ECONOMIC IMPACT

EMPLOYMENT

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

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

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

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

The music ecosystem generates 6,595 indirect jobs.

7,945 direct music jobs in Vancouver.
This includes: musicians, festivals, venues, music teachers, music publishers, studios & sound engineers, managers and labels, music press and marketing as well as music in film and theatre.

ADDITIONAL ECONOMIC REVENUE

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



INCOME/ WAGES

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

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

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

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

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

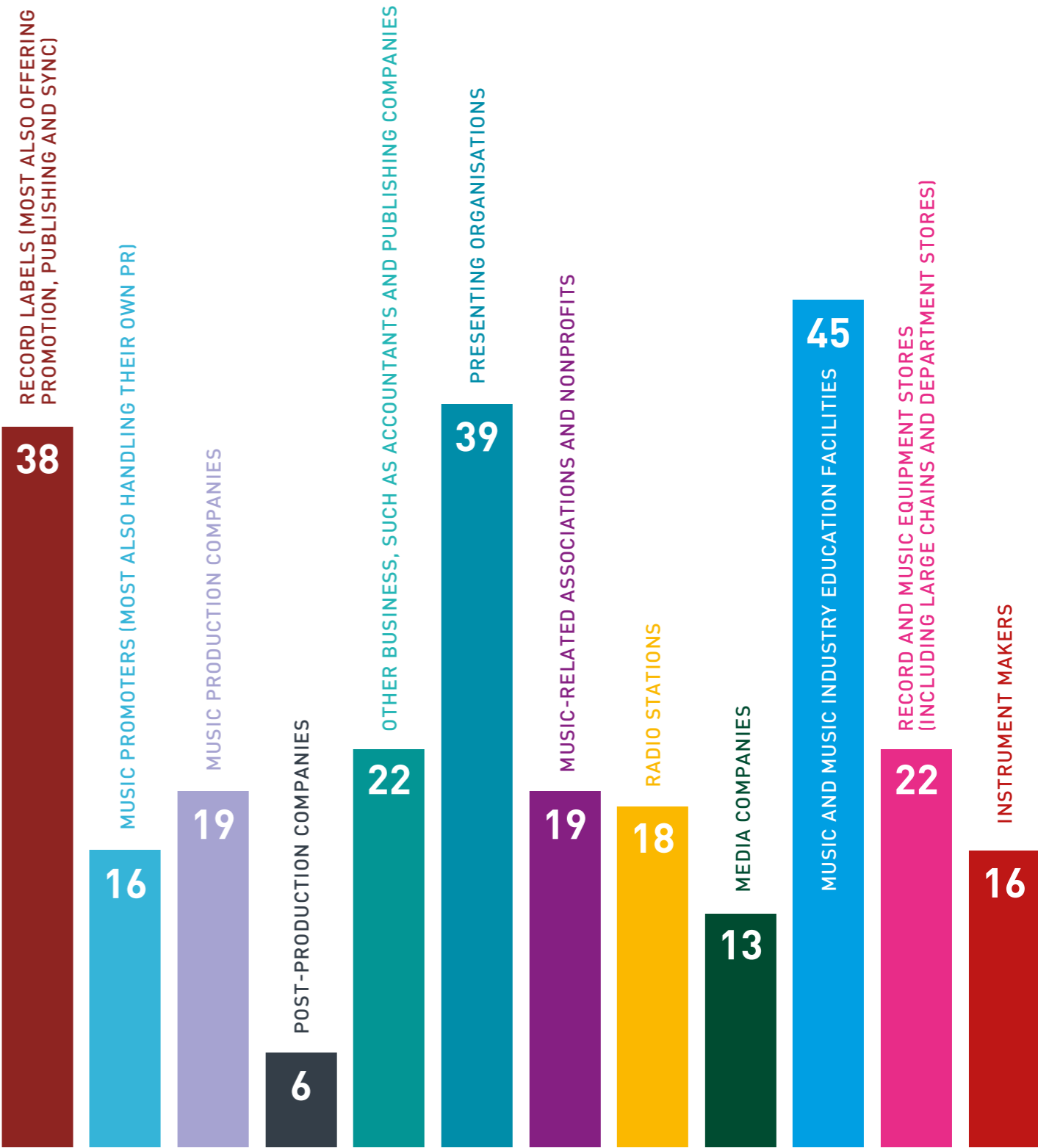
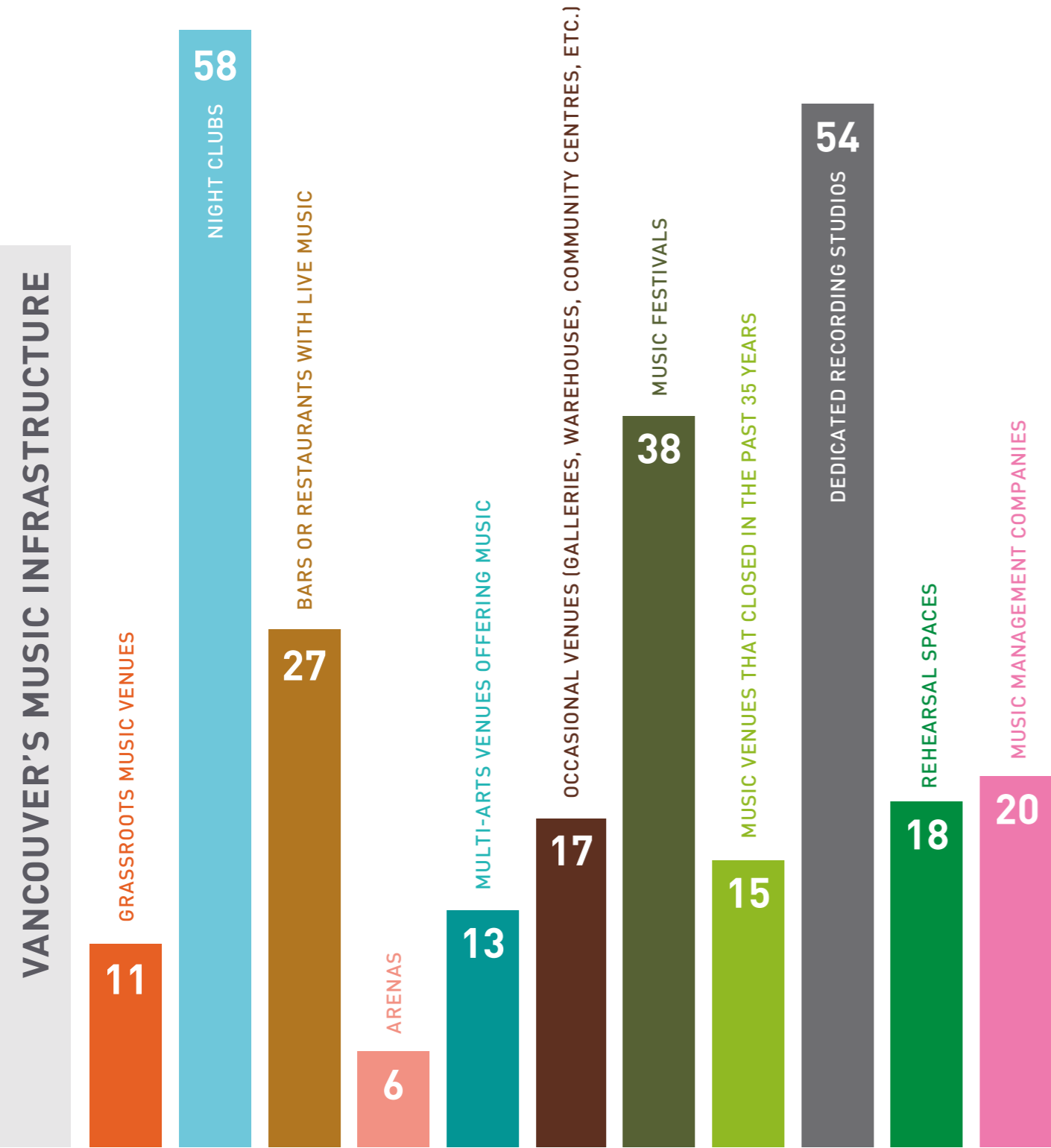


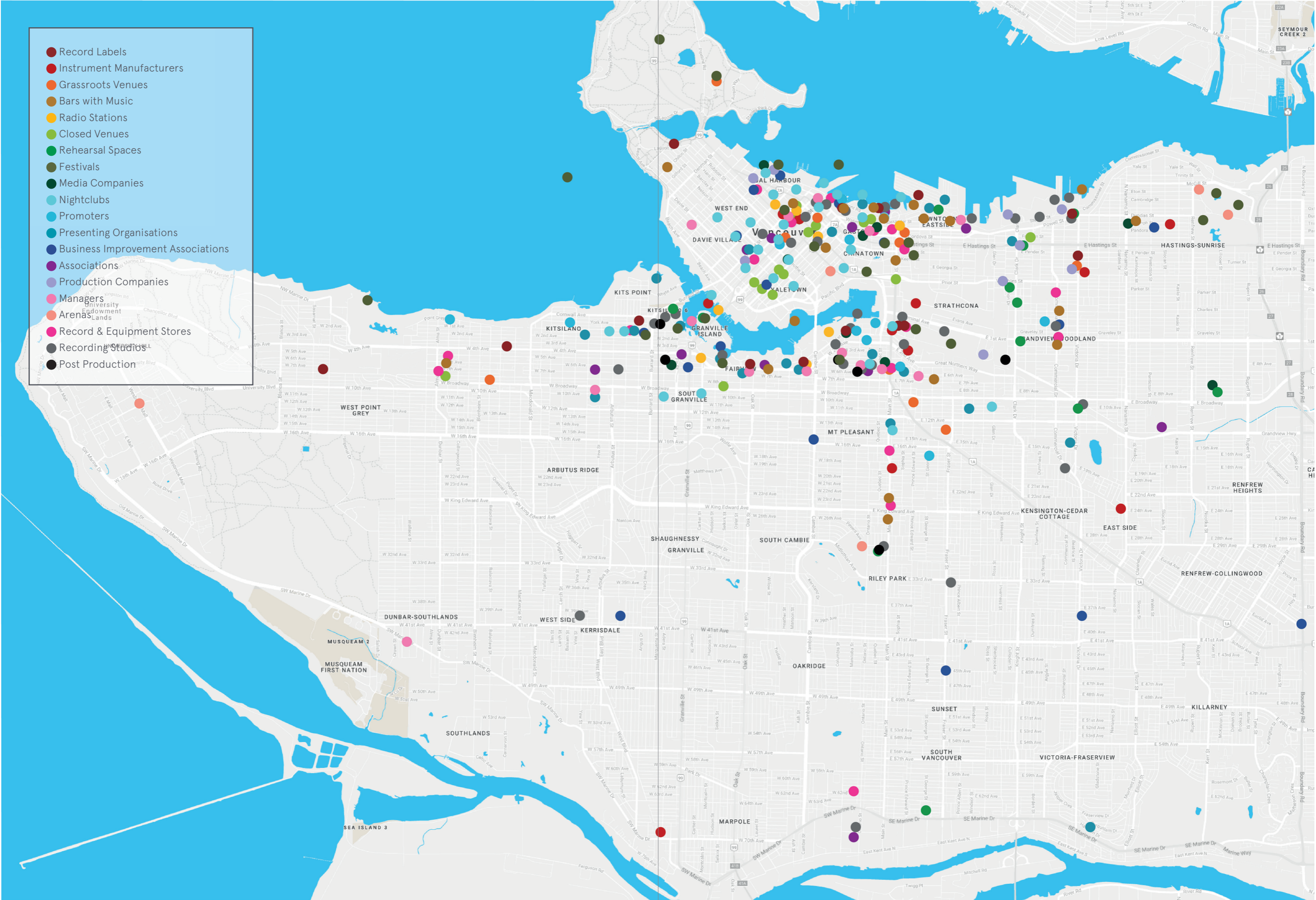
The economic impact of music in Vancouver, including employment and additional revenue, is over CAD \$690m.

ECONOMIC IMPACT

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

MUSIC INFRASTRUCTURE





KEY FINDINGS

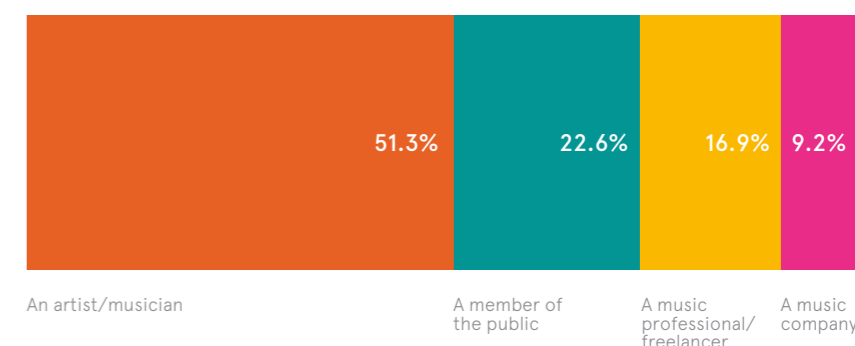
We consulted 120 local stakeholders through in-person interviews and roundtables from key areas in Vancouver's music sector, including education, music technology, artists and professionals, underground scenes and City Hall.

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

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

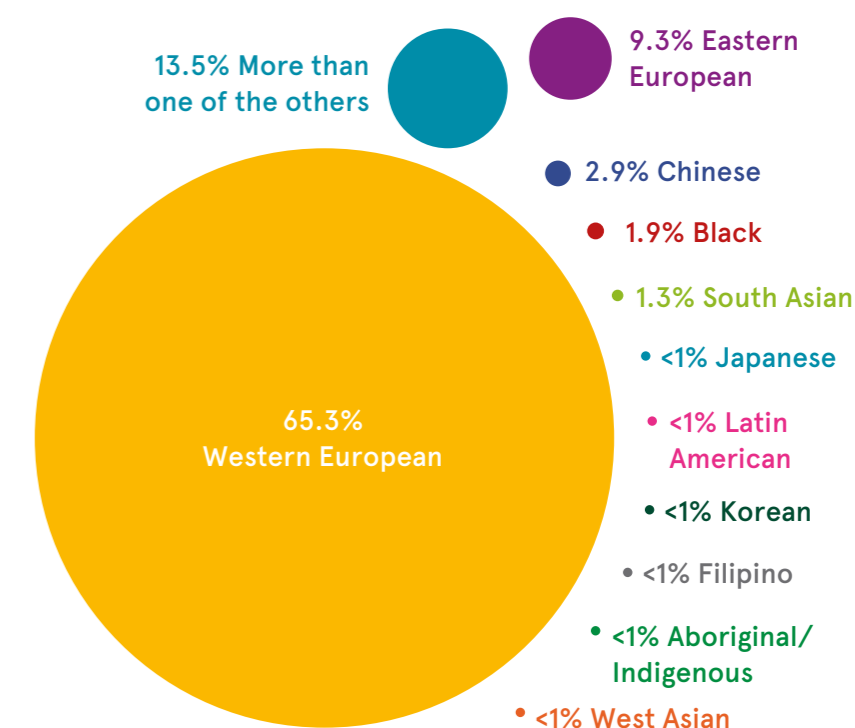
DEMOGRAPHICS OF THE VANCOUVER MUSIC INDUSTRY

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



MUSIC INDUSTRY SURVEY RESPONDENTS BY ETHNICITY

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



SURVEY RESPONDENT AGE CATEGORIES

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

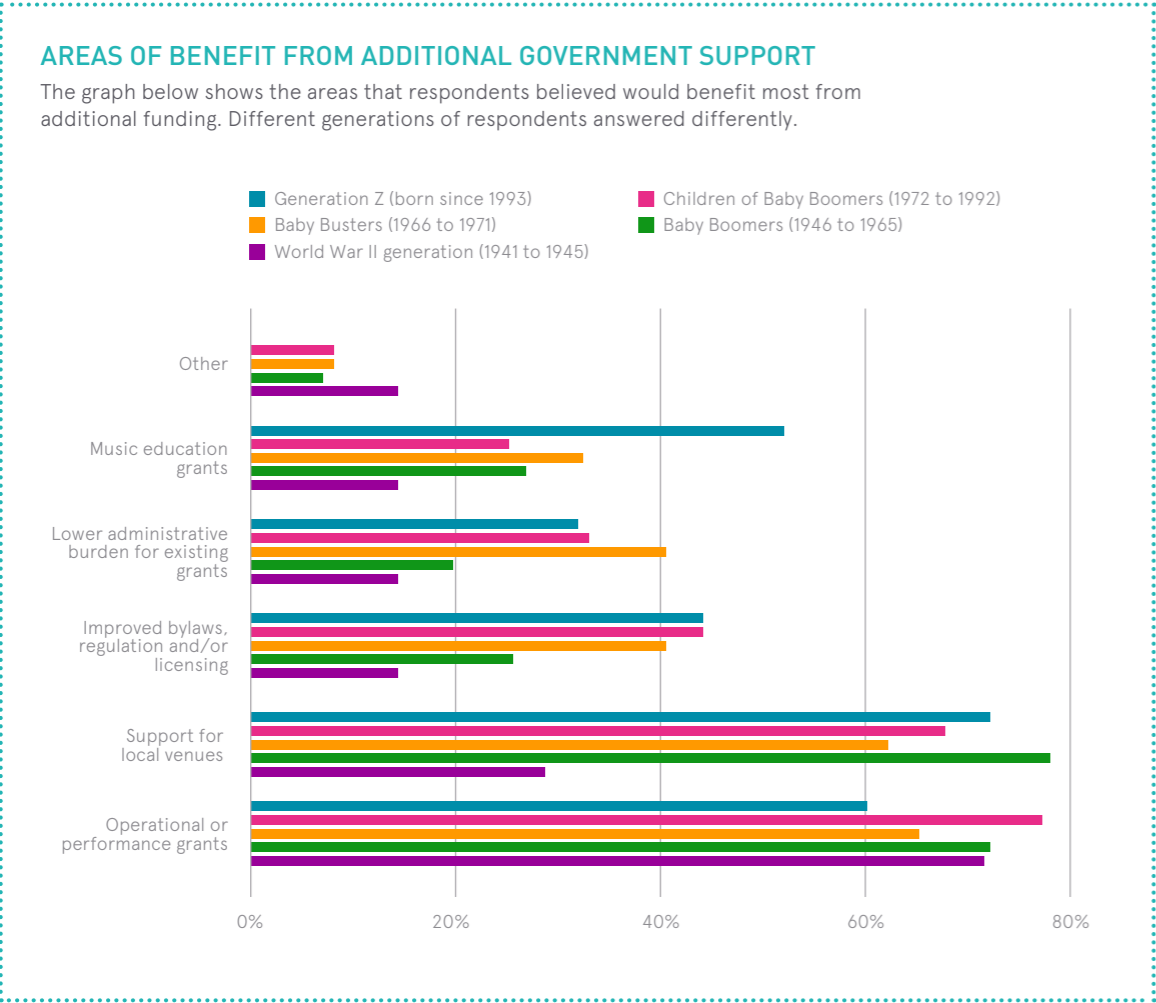
- Generation Z (born since 1993)
- Baby Busters (1966 to 1971)
- World War II generation (1941 to 1945)
- Children of baby Boomers (1972 to 1992)
- Baby Boomers (1946 to 1965)
- Parents of Baby Boomers (1919 to 1940)



KEY FINDINGS

GOVERNANCE AND LEADERSHIP

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



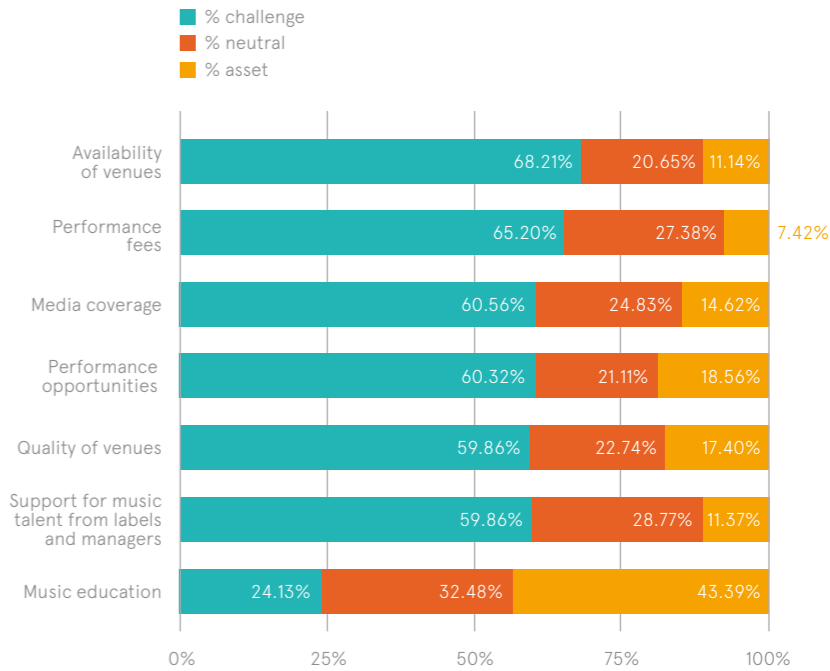
Tegan & Sara © Pavel Boiko

SPACES AND PLACES

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

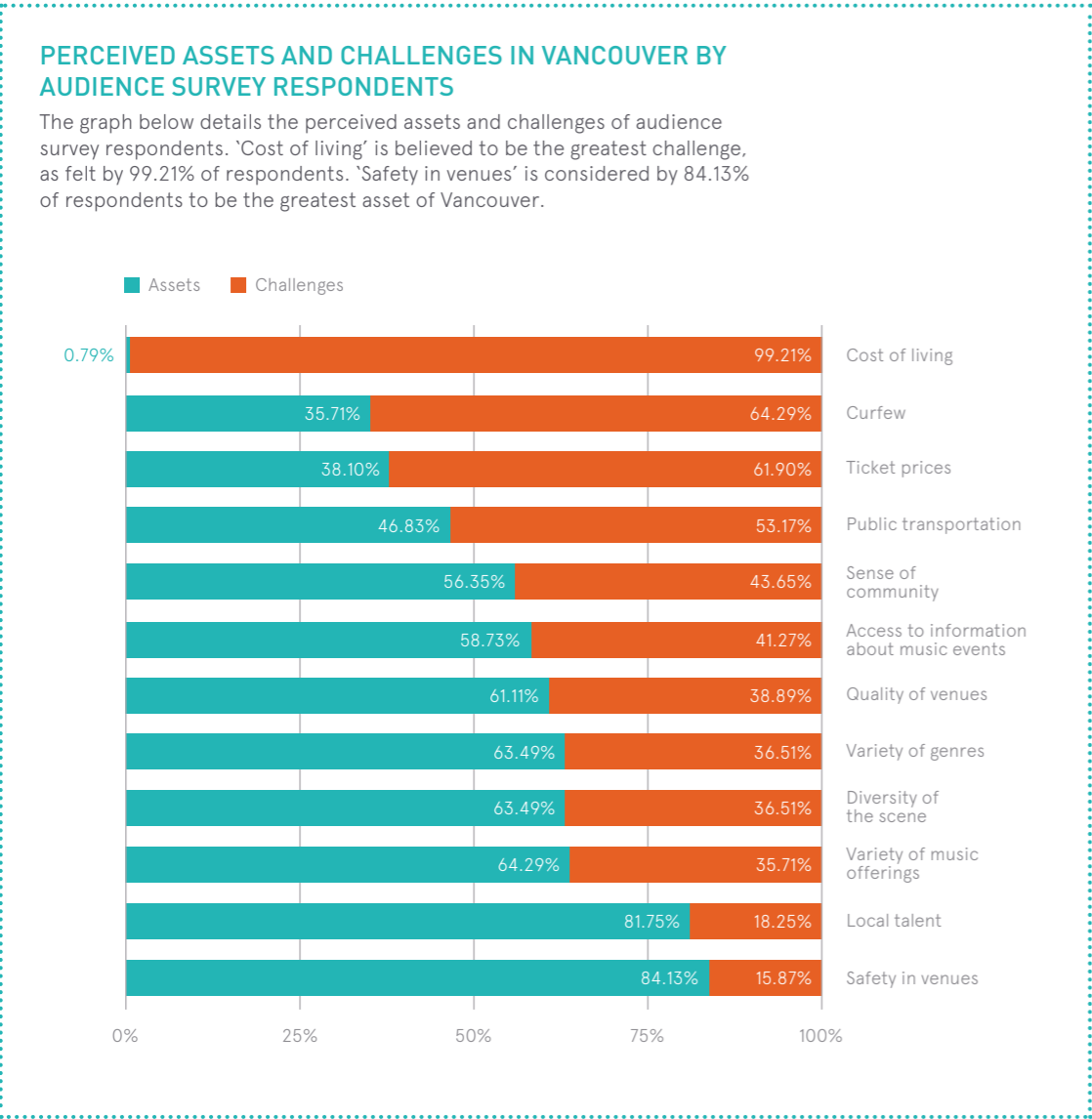
FURTHER CHALLENGES AND ASSETS FROM SURVEY RESPONDENTS

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



NIGHT-TIME ECONOMY

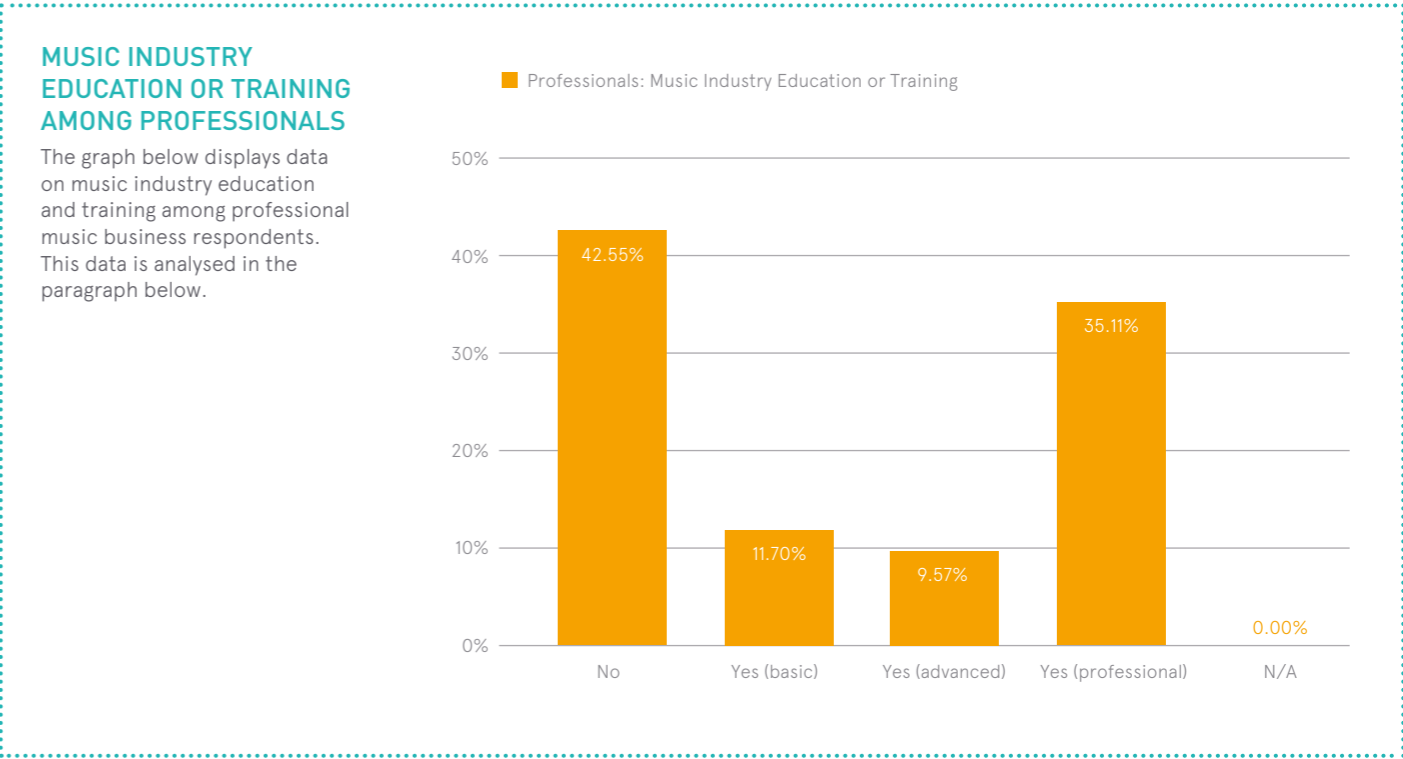
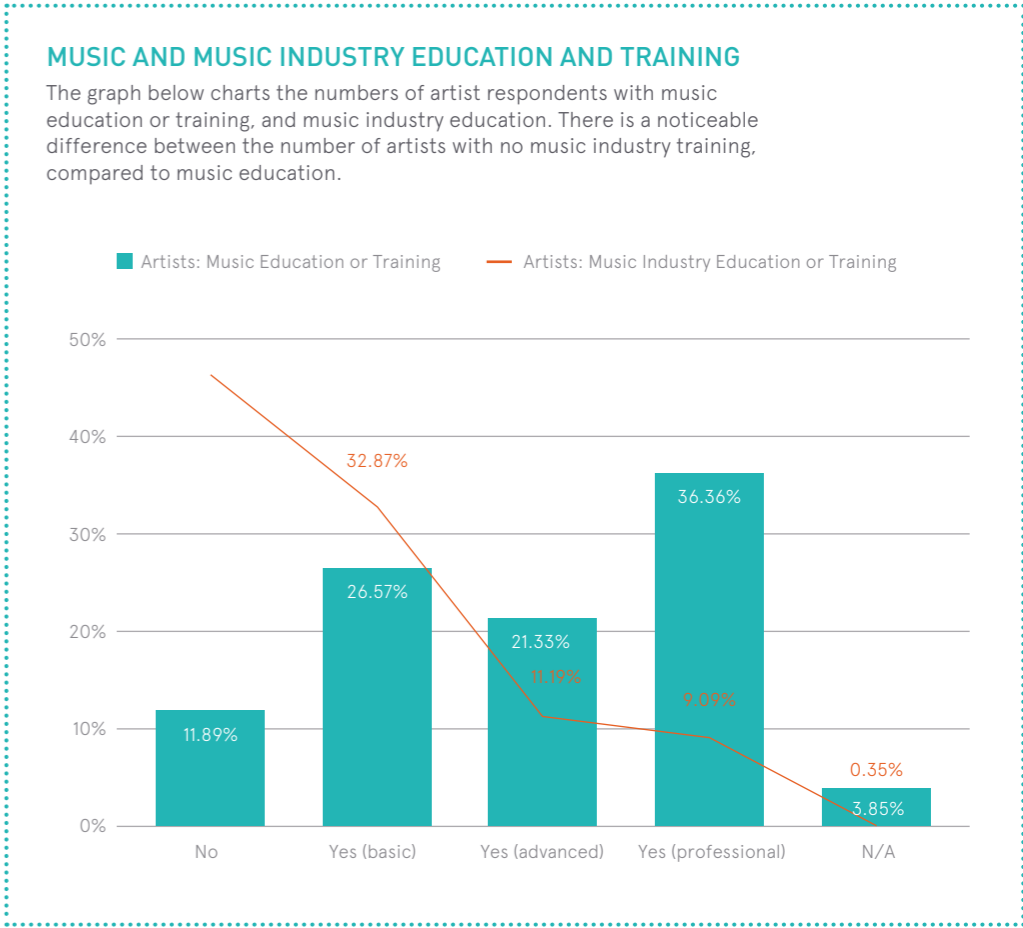
Fewer events are being hosted because of **obstacles with permits and curfews** in high-activity areas. **Limited late transport options** are available for music audiences in the city.



Neck of the Woods © Laura Harvey

MUSIC EDUCATION

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



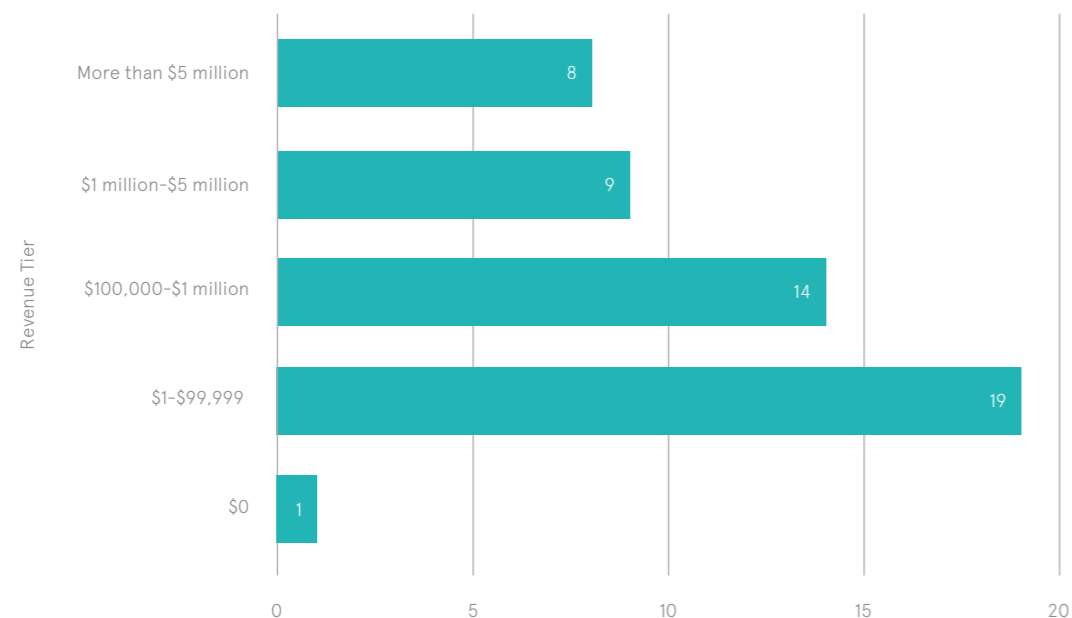


MUSIC INDUSTRY PROFESSIONAL DEVELOPMENT

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

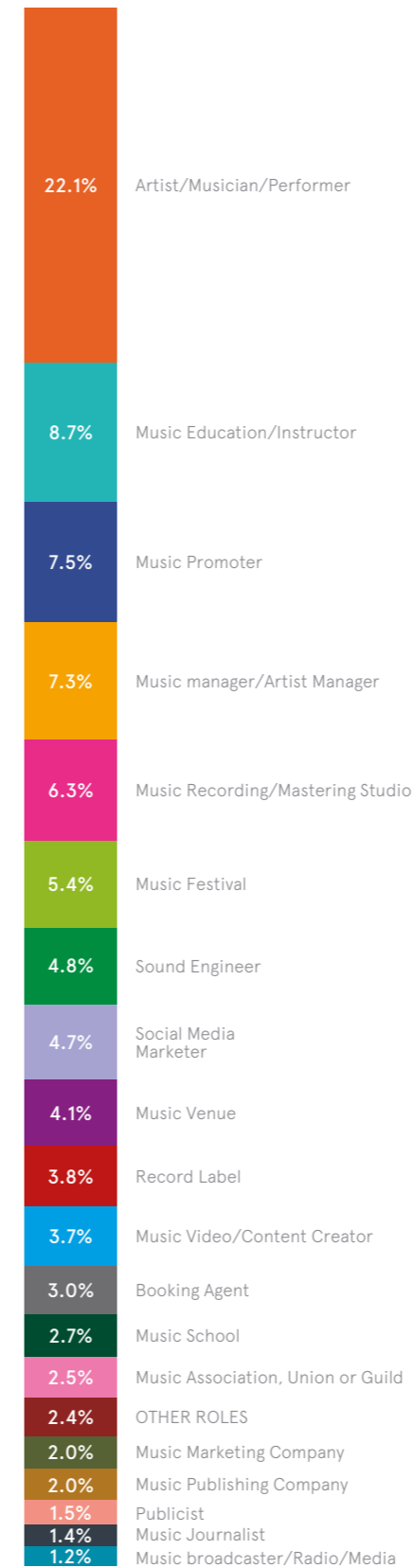
MUSIC BUSINESSES' TURNOVER

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



PREDOMINANT ROLES WITHIN THE VANCOUVER MUSIC INDUSTRY

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

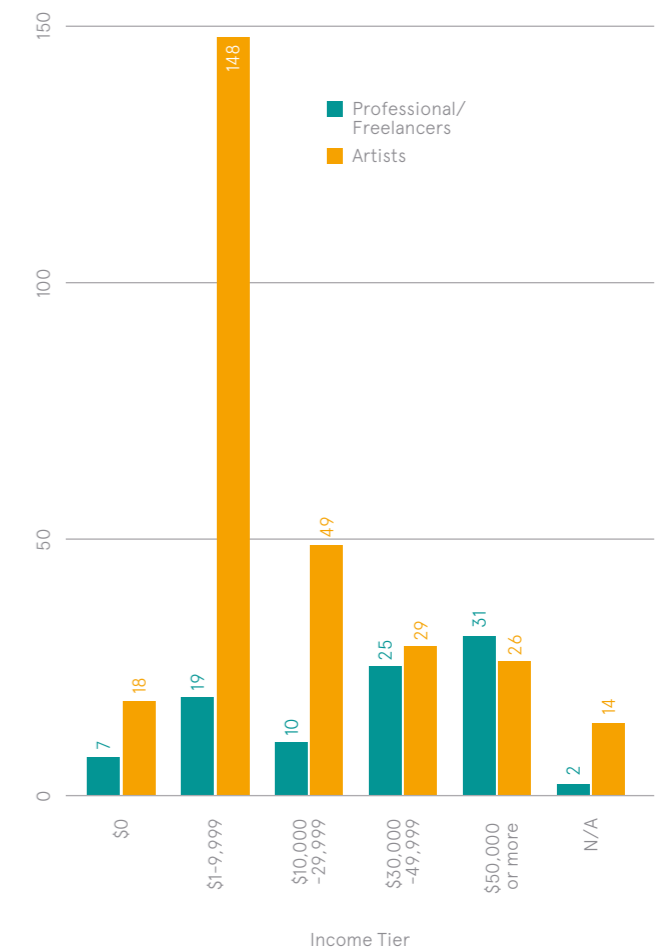


ARTIST DEVELOPMENT

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

INCOMES FROM MUSIC COMPARED BETWEEN PROFESSIONALS AND ARTISTS

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

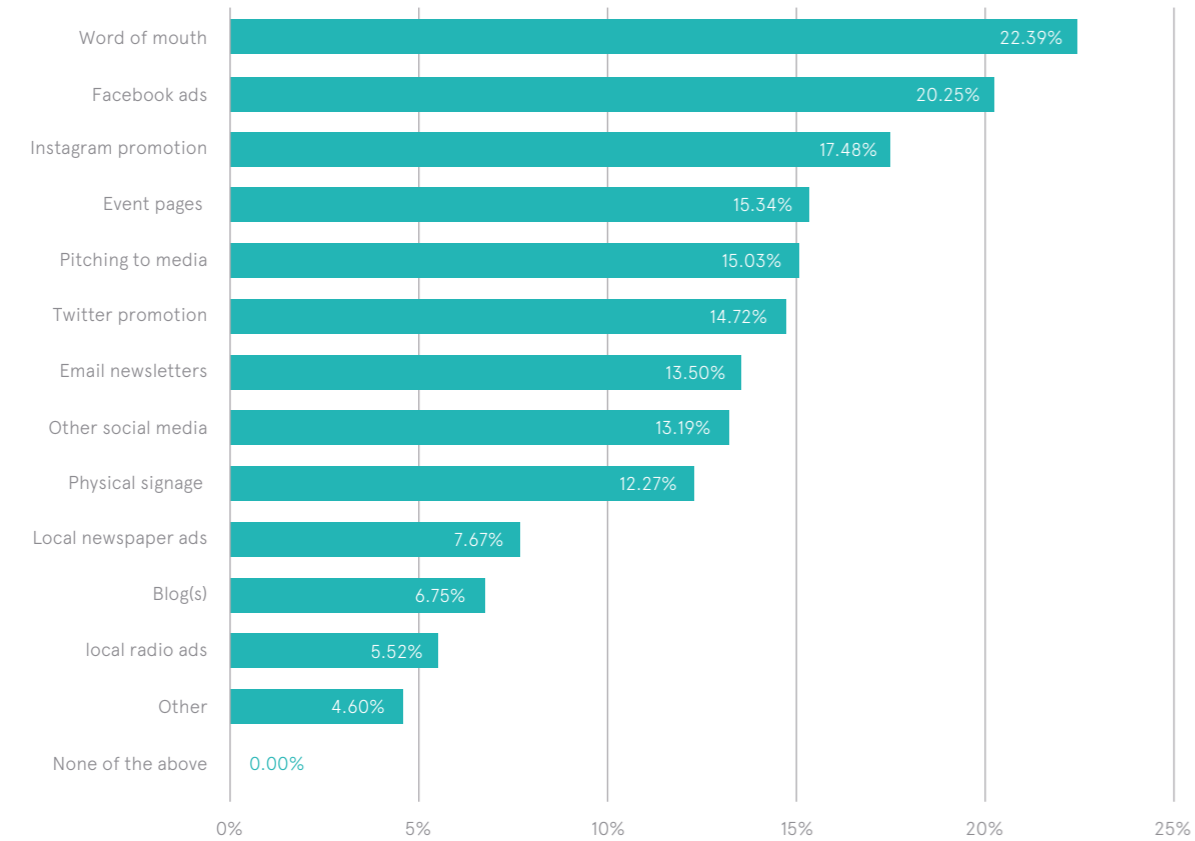


AUDIENCE DEVELOPMENT

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

USE OF PROMOTIONAL TOOLS FOR MUSIC-RELATED ACTIVITIES

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



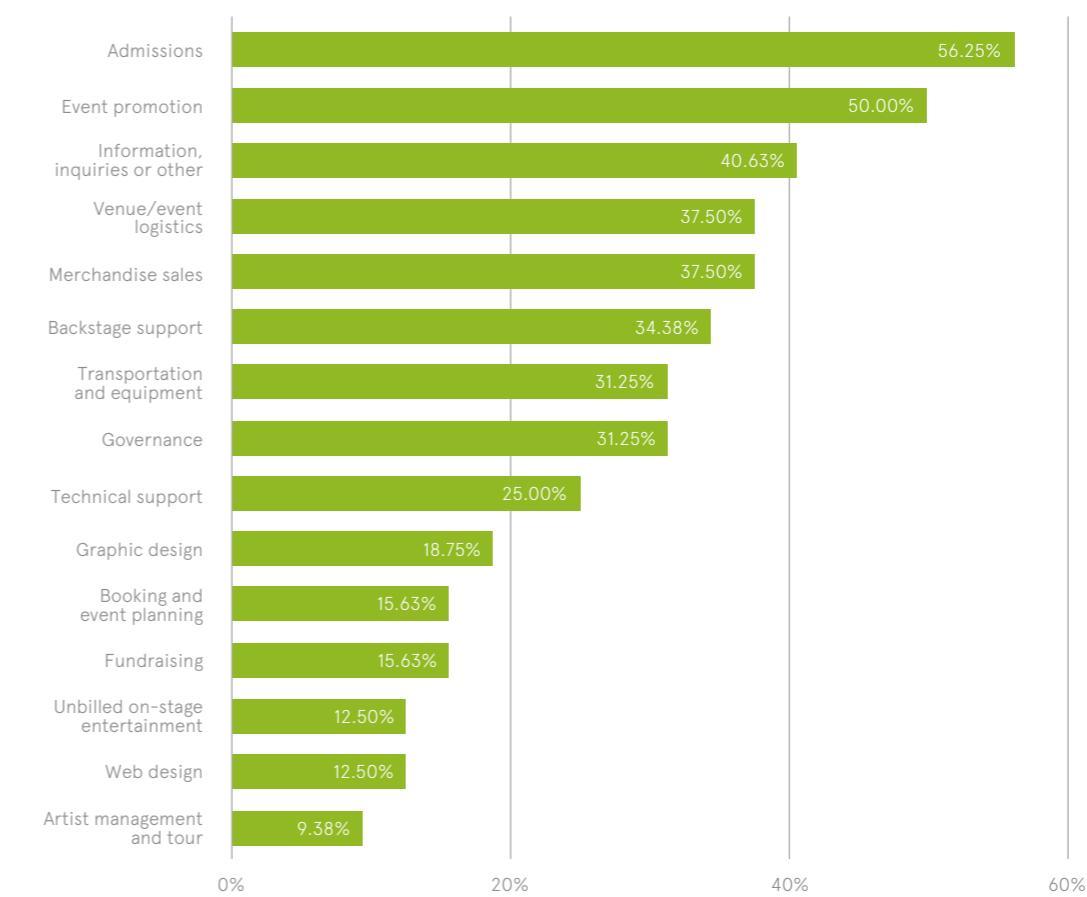
LOCAL INVOLVEMENT

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



VOLUNTEER ROLES IN VANCOUVER MUSIC INDUSTRY

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





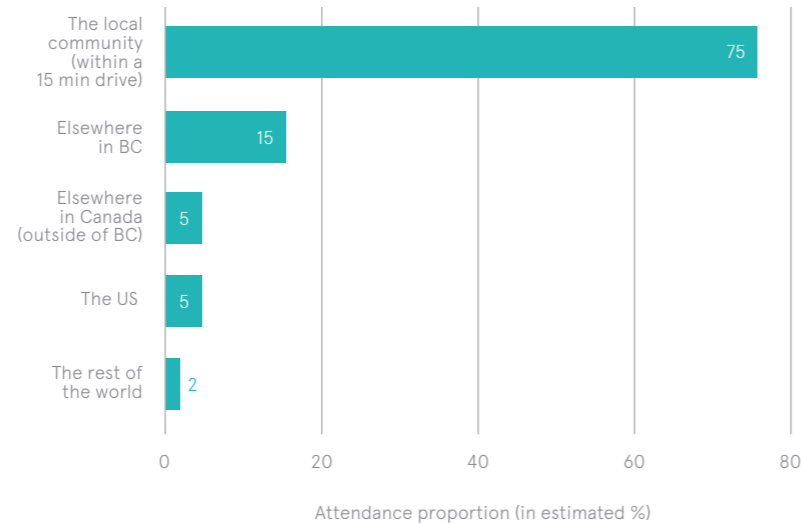
Arkells at The Junos © Laura Harvey

MUSIC TOURISM

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

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

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

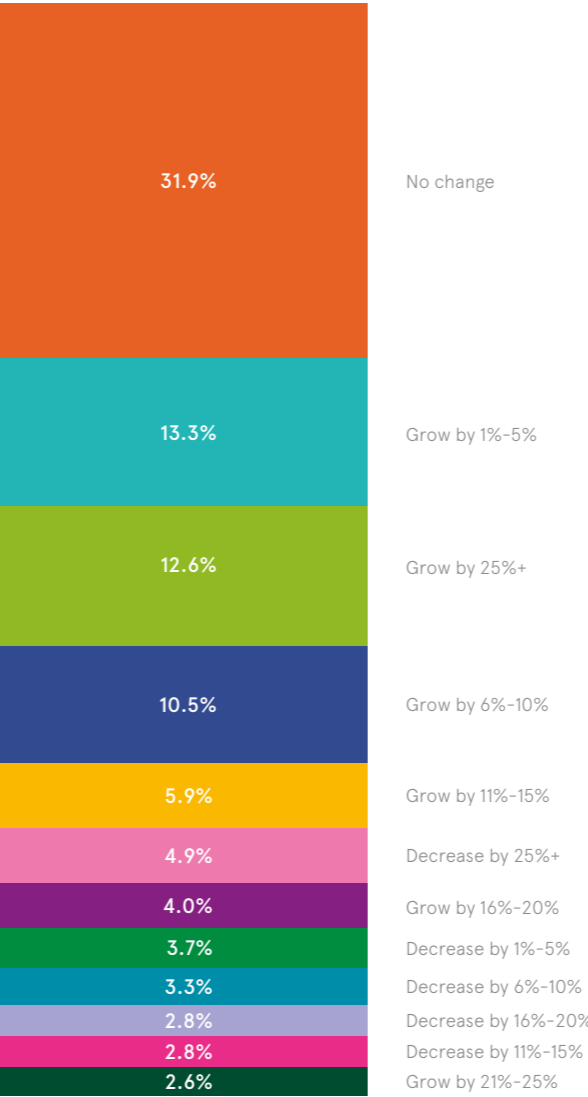


FUTURE PERSPECTIVES

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

INCOME CHANGE OF SURVEY RESPONDENTS IN THE PAST YEAR

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



Vancouver Symphony Orchestra © vso.org

RECOMMENDATIONS

MAIN GOALS TO BE ACHIEVED THROUGH THE RECOMMENDATIONS

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

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

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

Cluster music spaces and places to boost economic activity.

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

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

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

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

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

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

RECOMMENDATIONS AND ACTIONS

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

GOVERNANCE AND LEADERSHIP

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

MAIN ACTIONS

- Appoint a Music Officer within the City Manager’s Office

NEXT STEPS

- Provide artists and professionals with free assistance in key areas of the music economy and current City requirements
- Set up a monthly meeting with Film, Tech and Community advisors positioned within City Hall
- Measure the impact of the local music sector through a satellite account

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

MAIN ACTIONS

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

NEXT STEPS

- Develop a Canadian Music Cities Alliance

FURTHER ACTIONS

- Strengthen and further develop collaborations with international music cities

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

MAIN ACTIONS

- Extend existing ‘music-friendly’ policies to key activity areas

NEXT STEPS

- Streamline permits and licenses required to produce music events in public spaces
- Mediate between venues and residents to ease sound complaints

FURTHER ACTIONS

- Assess the implementation of an ‘Agent of change’ principle in key activity areas

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

MAIN ACTIONS

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

NEXT STEPS

- Create a grant to increase attendance to music and cultural events
- Create a micro-grant for staff training in night-time music venues and clubs

FURTHER ACTIONS

- Provide grants to support access to live music for musicians, professionals and audiences with diverse abilities
- Provide ‘quick’ live music audience development grants and in-kind support
- Create a micro-grant for media publications that grow and promote the local grassroots music scene

SPACES AND PLACES

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

MAIN ACTIONS

- Reassess the criteria and requirements for the Vancouver Civic Theatres program to enable support for for-profit organisations.
- Build a music hub that includes accessible rehearsing/ jamming spaces, co-working spaces, multi-purpose rooms and a performing stage.

NEXT STEPS

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



Peach Pit © Laura Harvey

MUSIC EDUCATION

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

NEXT STEPS

- Create a network of schools to provide music education as a joint effort
- Develop a music internship and mentorship database



Spruce Trap © Laura Harvey

NIGHT-TIME ECONOMY

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

MAIN ACTIONS

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

NEXT STEPS

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

FURTHER ACTIONS

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



Rykka © Christopher Edmonstone Photography

ARTIST DEVELOPMENT

8. INCREASE ACCESSIBILITY TO ARTIST DEVELOPMENT OPPORTUNITIES IN VANCOUVER

NEXT STEPS

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

FURTHER ACTIONS

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

MUSIC INDUSTRY PROFESSIONAL DEVELOPMENT

9. ENCOURAGE PROFESSIONAL DEVELOPMENT IN THE LOCAL MUSIC INDUSTRY

NEXT STEPS

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

FURTHER ACTIONS

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





Leif Vollebakk at #SingItFwd © Lindsey Blane

AUDIENCE DEVELOPMENT

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

NEXT STEPS

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

FURTHER ACTIONS

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



Little Destroyer © Laura Harvey

LOCAL INVOLVEMENT

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

NEXT STEPS

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

MUSIC TOURISM

12. CREATE A 'VANCOUVER MUSIC' TOURISM MARKETING CAMPAIGN

MAIN ACTIONS

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

NEXT STEPS

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

FURTHER ACTIONS

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

ABOUT THE AUTHORS



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



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



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

In response to a need to understand the Vancouver music ecosystem, we prepared the report for:



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