VANCOUVER MUSIC ECOSYSTEM STUDY


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
EMPLOYMENT AND ECONOMIC IMPACT

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

EMPLOYMENT

- Each entertainment job generated within Vancouver supports an additional 0.83 jobs.
- There are 7,945 direct music jobs in Vancouver, including artists.
- The music ecosystem supports a total of 14,540 jobs.
- The music ecosystem generates 6,595 indirect jobs.

ADDITIONAL ECONOMIC REVENUE

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

INCOME/WAGES

- The average income within the music venue industry is CAD $51,000. The festival business is well above city average, at CAD $65,000.
- Vancouver musicians’ average annual income is CAD $18,178 (city-wide average income is CAD $49,702). The national average income for musicians is CAD $22,770.
- 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.

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

GRASSROOTS MUSIC VENUES
- Nightclubs: 58
- Bars or restaurants with live music: 27
- Arenas: 11
- Multi-arts venues offering music: 13

MULTI-ARTS VENUES
- Occasional venues, galleries, warehouses, community centres, etc.: 38

MUSIC VENUES THAT CLOSED IN THE PAST 35 YEARS
- Dedicated recording studios: 54

REHEARSAL SPACES
- Music management companies: 18

MUSIC FESTIVALS
- Music venues that closed in the past 35 years: 20

MUSIC MANAGEMENT COMPANIES
- Music promoters most also handling their own PR: 38

RECORD LABELS (MOST ALSO OFFERING PROMOTION, PUBLISHING AND SYNC)
- Music production companies: 16

MUSIC PROMOTERS (MOST ALSO HANDLING THEIR OWN PR)
- Post-production companies: 19

RECORDED AND MUSIC EQUIPMENT STORES (INCLUDING LARGE CHAINS AND DEPARTMENT STORES)
- Other business, such as accountants and publishing companies: 22

PRESENTING ORGANISATIONS
- Music-related associations and nonprofits: 39

MUSIC AND MUSIC INDUSTRY EDUCATION FACILITIES
- Media companies: 19

INSTRUMENT MAKERS
- Radio stations: 18

ACCOUNTANTS AND PUBLISHING COMPANIES
- Record and music equipment stores: 45

RADIO STATIONS
- Music and music industry education facilities: 22

MUSIC PRODUCTION COMPANIES
- Media companies: 13

RECORD AND MUSIC EQUIPMENT STORES (INCLUDING LARGE CHAINS AND DEPARTMENT STORES)
- Music and music industry education facilities: 16
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 8.2% from a music company.

MUSIC INDUSTRY SURVEY RESPONDENTS BY ETHNICITY

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

SURVEY RESPONDENT AGE CATEGORIES

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

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

AREAS OF BENEFIT FROM ADDITIONAL GOVERNMENT SUPPORT
The graph below shows the areas that respondents believed would benefit most from additional funding. Different generations of respondents answered differently.

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

FURTHER CHALLENGES AND ASSETS FROM SURVEY RESPONDENTS
The graph below shows in detail more perceived challenges and assets in Vancouver from survey respondents. The findings show that there are more challenges than assets.
NIGHT-TIME ECONOMY
Fewer events are being hosted because of obstacles with permits and curfews in high-activity areas. Limited late transport options are available for music audiences in the city.

PERCEIVED ASSETS AND CHALLENGES IN VANCOUVER BY AUDIENCE SURVEY RESPONDENTS
The graph below details the perceived assets and challenges of audience survey respondents. ‘Cost of living’ is believed to be the greatest challenge as felt by 99.21% of respondents. ‘Safety in venues’ is considered by 84.13% of respondents to be the greatest asset of Vancouver.

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

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

MUSIC INDUSTRY EDUCATION OR TRAINING AMONG PROFESSIONALS
The graph below displays data on music industry education and training among professional music business respondents. This data is analyzed in the paragraph below.
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 $5 million.

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.
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.
RECOMMENDATIONS

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

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

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

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.

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

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

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

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

MAIN GOALS TO BE ACHIEVED THROUGH THE RECOMMENDATIONS
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

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

Peach Pit © 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.

MUSIC INDUSTRY PROFESSIONAL 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.

9. ENCOURAGE PROFESSIONAL DEVELOPMENT IN THE LOCAL MUSIC INDUSTRY

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

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

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

NEXT STEPS
- Start a city-wide ‘friends of Vancouver music’ membership program
- Introduce music 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

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:

Funding for this project was provided by Creative BC through the BC Music Fund funded by the Province of British Columbia. Any opinions, findings, conclusions, or recommendations expressed in this material are those of the author and do not necessarily reflect the views of Creative BC or the Province of BC. The Province of BC and its agencies are in no way bound by the recommendations contained in this document.