

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

Vancouver Economic Ecosystem Study

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Funding for this project was provided through the BC Music Fund. 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.

Contents

1. Introduction	3
1.1 About the project	3
1.2 Methodology	6
1.3 About the authors	7
2. Context	9
2.1 Global context	9
2.2 Vancouver's Place in Canada's Music Industry	9
2.3 General Statistics	11
3. Vancouver's Music Economic Impact	13
3.1 Methodology	13
3.2 Employment Impact	13
3.3 Additional Economic Revenue	17
3.4 Economic Impact	18
3.5 Music Infrastructure	20
4. Comparative Analysis	26
5. Interview and Survey Findings	30
5.1 Key Findings	32
6. Strategic Recommendations	79
6.1 Summary of Recommendations and Actions	79
6.2 Municipal Support	82
6.3 Spaces and Places	94
6.4 Night-Time Economy	97
6.5 Music Education	102
6.6 Music Artist Development	105
6.7 Music Industry Professional Development	108
6.8 Audience Engagement	112
6.9 Local Involvement	115
6.10 Area of Music Tourism	117
7. Bibliography	120
Appendices	137
Appendix A	137
Appendix B	139
Appendix C	172
Appendix D	210
Appendix E	222
Appendix F	236

Appendix G	243
Appendix H	256

List of tables and figures

Figure 1. Music industry survey respondents by ethnicity	12
Figure 2. Direct and indirect jobs within the music ecosystem	14
Figure 3. Income change of survey respondents in the past year	16
Table 1. Additional Economic Revenue with artists, festivals and venues	18
Figure 4. All Music Assets in Vancouver	20
Figure 5. All Music Venues and Festivals in Vancouver	21
Figure 6. Closed Music Venues	21
Figure 7. Closed Venues and Actual Grassroots Music Venues	22
Figure 8. Recording Studios and Rehearsal Spaces in Vancouver	22
Figure 9. Music Industry in Vancouver	23
Figure 10. Music Associations, Radios and Media in Vancouver	24
Figure 11. Record and equipment stores and instrument suppliers in Vancouver	25
Figure 12. Maps legend	25
Figure 13. Map of respondents identified in Vancouver	31
Figure 14. Demographics of the Vancouver music industry	32
Figure 15. Music Business respondents by category	35
Figure 16. Volunteer roles in Vancouver music industry	36
Figure 17. Areas of benefit from additional government support	38
Figure 18. Challenges and assets from music industry respondents	42
Figure 19. Challenges and assets of Vancouver music industry from music professionals and artists	48
Figure 20. Further challenges and assets from survey respondents	51
Figure 21. Predominant roles within the Vancouver music industry	53
Figure 22. Music and music industry education and training	55
Figure 23. Music industry education or training among professionals	56
Figure 24. Music businesses' turnover	58
Figure 25. Incomes from music compared between professionals and artists	60
Figure 26. Survey respondent age categories	61
Figure 27. Creative BC's BC Music Fund 2017-18 grant recipients by genre	63
Figure 28. Creative BC's BC Music Fund 2017-18 grant recipients per program, by genre	64
Figure 29. Survey data demonstrating frequency of live music attendance by members of the public	66
Figure 30. Use of promotional tools for music-related activities	71
Figure 31. Perceived assets and challenges in Vancouver by audience survey respondents	73
Figure 32. Origin of visitors in live music attendance (promoters, venues and festivals)	76
Table 2. Summary of Recommendations and Actions	79

List of Appendix tables and figures

Table A.1 Canadian music strategies and initiatives	137
Table B.1 Associations, Choirs, Orchestras and Non-profits Vancouver	139
Table B.2 Closed venues Vancouver	146
Table B.3 Music Festivals Vancouver	147
Table B.4 Music Industry Businesses Vancouver	150
Table B.5 Other Music Industry Businesses Vancouver	155
Table B.6 Music Schools	156
Table B.7 Music Venues Vancouver	158
Table B.8 Radio Stations Vancouver	164
Table B.9 Media Companies Vancouver	165
Table B.10 Record Stores and Instrument Manufacturers Vancouver	166
Table B.11 Recording Studios and Rehearsal Spaces	168
Table C.1 Proposed music sound emission levels for music venues situated in the Valley Special Entertainment Area	175
Table C.2 Seattle sound regulations	204
Table C.3 Comparative table of laws	208
Table D.1 Business typologies for liquor serving establishments	212
Table D.2 Ratio of required supervisory staff per number of attendees	218
Figure E.1 Sign By-law Guide: Business Identification Signs	223
Figure E.2 Example of poster cylinder in Vancouver	224
Figure E.3 Example of sandwich board in Vancouver	225
Figure E.4 Example of private property advertisement in Vancouver	225
Figure E.5 Example of window signs in Vancouver	226
Figure E.6 Example of projected advertisement	227
Figure E.7 Example of floating sign	228
Figure E.8 Advertising in Vancouver transit	233
Figure E.9 Example of bike parking advertising (1)	234
Figure E.10 Example of bike parking advertising (2)	235
Table F.1 Available grants and funding for music and culture in Vancouver and British Columbia	236

1. Introduction

1.1 About the project

Vancouver has a very vibrant music scene and a strong music ecosystem. Music contributes to the social and cultural fabric of the city, as well as the 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, one in which partnerships can be formed for mutual benefit, is critical for breathing life and energy into the environment.

Sound Diplomacy has worked to both benchmark and further develop Vancouver's music ecosystem to feed into a music strategy. We have assessed Vancouver's diverse music communities across genre, ethnicity and sector, and reported on their impact and value across the city.

Sections 2-3: A comprehensive view 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 wide-ranging look at five leading music cities, as well as a comparative analysis of where Vancouver stands among 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 will want to know about.

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

FACTOR

FACTOR (the Foundation Assisting Canadian Talent on Recordings) is a public/private partnership that supports the production of sound recordings by Canadian musicians and helps Canadian music companies make recordings available to a wider public.

Creative BC (Through BCMF) Funded by the Province of British Columbia

Creative BC is an independent society created and supported by the Province of BC to sustain and help grow BC's creative sector (film and television, digital and interactive media, music, and magazine and book publishing industries). The society delivers a wide range of programmes and services to expand BC's creative economy.

The Government of Canada

National government body for the country.

The Province of British Columbia

The Government of British Columbia, through various branches and service lines, provides key services to ministries and organisations, local governments, employees, and broader public sector (BPS) entities.

Funding for this project was provided through the BC Music Fund. 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.

1.2 Methodology

Sound Diplomacy has developed a unique four-pronged methodological approach to deliver a comprehensive assessment of the Vancouver music ecosystem:

- Step 1. Comparative Analysis: We undertook detailed desk research, a literature review and international comparative analysis, to see how Vancouver ‘sits’ within the global ‘music cities’ movement.
- Step 2. Place Research: Working together with our local consultant, Craig Spann, our research identified the depth and breadth of music-related uses within Vancouver’s city radius (LGA). We’ve listed music venues, festivals, rehearsal spaces, recording studios, music industry professionals, retailers, radio stations and labels.
- Step 3. Stakeholder Engagement: We performed thorough stakeholder engagement activities, a comprehensive survey of 862 music professionals and fans, online and face-to-face interviews and roundtable sessions with over 120 key local and international industry figures. The survey and industry interviews acted as an integral source of context. The interviews also helped to inform and contribute to the comparative analysis, key findings and recommendations.
- Step 4. Analysis of Findings and Recommendations: We have developed a set of 12 actionable recommendations for the further enhancement of Vancouver’s music, and music tourism and marketing offering, based on the analytical work. We have prioritised those recommendations in 2 tiers, based on their urgency, complexity to implement, as well as resources and desired outcome.

1.3 About the authors

Sound Diplomacy

Sound Diplomacy is the leading global advisor on music cities and market development. As strategists for cities, developers, large private sector organisations and governments, Sound Diplomacy provides cutting edge research and market expertise in increasing the value of the music and music business economies in state, city, region and development plans. In addition, they are experts in music tech strategies, from trade missions to market development, research and consulting.

Sound Diplomacy works in both the public and private sector, simultaneously in 20 countries for a number of governments (local, regional and national), property developers, music and music-tech conferences, economic development agencies, arts councils, chambers of commerce, universities, export offices, festivals, brands and record labels.

Secret Study Projects

In 2010, Rob Calder formed the creative agency, Secret Study, to build meaningful and connective experiences in the music space. Secret Study has now become a source for talent buying, live event production, and consulting, for companies such as TELUS, Jansport, Fairmont Hotels, Red Truck, and Newcap Radio. Most recently Secret Study has worked closely with a variety of organisations including Music BC, FACTOR, and Creative BC on artist opportunity programmes at the Upstream Festival in Seattle as well as with the Vancouver International Film Festival, the BC Tech Summit and the 2018 JUNO Awards in Vancouver. Secret Study has also produced content campaigns for brands such as Kokanee, Vitamin Water and Rolex as well as commercials for Nikon and CBC.

Music BC Industry Association

Music BC Industry Association is a not-for-profit association serving the for profit and non-profit music industry, including artists from all genres, industry professionals, service providers, studios, promoters, venues, festivals, producers, agents, managers and educational institutions.

Vancouver Music Steering Committee

The Vancouver Music Steering Committee was created by the City of Vancouver's Corporate Leadership Team (CLT) at the direction of the Vancouver City Council to provide strategic recommendations to increase city support for music and musicians. The Steering Committee provides recommendations in consultation with the Advisory Committee to prepare reports and recommendations to Council.

There are 9 members:

- Sandra Gajic (Co-Chair) - City of Vancouver
- Alex Grigg (Co-Chair) - Music BC
- Rob Calder - Secret Study
- Sharman King - ACPC/Vancouver Opera Orchestra
- Lynn Ross - City of Vancouver
- Mike Schroeder - NIMBUS School of Recording and Media
- Amy Terrill - Music Canada
- Kelly Tweeddale - Vancouver Symphony Orchestra

2. Context

2.1 Global context

The Canadian music market grew by 12.8% in 2016, and by the following year was 6th largest recorded music market in the world, totalling CAD \$489.4million. Streaming revenues grew in 2016 from USD \$15.72million in 2015, to USD \$94.45million. The music market in Canada is growing much faster than the world average - 12.8% compared to 5.9% globally¹. The digital music industry dominates the Canadian music market, accounting for 63% of recorded music revenues in 2016².

While there is continuous growth in digital, streaming and overall recorded music revenues, there is a noticeable decline in revenues from physical sales. Revenue fell from USD \$114.4million in 2015 to USD \$99million in 2016. This is on par with the global trend, which saw a 7.6% decrease in the same period³.

Canada's export to the global music market include some of the most well-known artists in the world: Leonard Cohen, Drake, Justin Bieber, Michael Bublé, Diana Krall, and The Weeknd. Each broke away from the national industry to make a name for themselves globally, paving the way for other bands and artists to do the same⁴.

2.2 Vancouver's Place in Canada's Music Industry

Vancouver benefits from ocean, mountains and city, making it a visually spectacular place to visit. Rated the 3rd most liveable city in the world (behind Melbourne and Vienna)⁵, Vancouver has much to offer, including water sports, culinary experiences, arts and culture, hiking, nightlife, and sightseeing.

British Columbia is the third largest centre for music production in Canada, placing Vancouver in a fortunate position to develop and sustain a successful local music industry. Vancouver boasts 18 rehearsal spaces, 16 instrument makers, and 22 music stores (of which 19 are independent). The province of British Columbia has over 160 recording

¹ <http://www.michaelgeist.ca/2017/11/music-canada-data/>

²

<https://www.newswire.ca/news-releases/canada-climbs-to-sixth-largest-global-recorded-music-market-in-ifpis-global-music-report-2017-620412823.html>

³ Ibid

⁴ <https://www.funktasy.com/canada-dominating-world-music-industry/>

⁵ <https://www.economist.com/blogs/graphicdetail/2017/08/daily-chart-10>

studios, over 285 music companies, and is home to more than 200 festivals⁶. Despite all this, the largest festivals in Canada take place in Montreal and Quebec City, and Toronto is considered the best city in Canada for music production⁷. Vancouver faces high competition from these cities, and must continue to expand its own identity in order to entice and retain music industry professionals.

Granville Street is considered the hub of live music in Vancouver, and the city is developing new opportunities for the expansion of entertainment areas. Although Ontario is stiff competition for Vancouver and British Columbia, both the Ontario Music Fund and Creative BC offer 50% off recording costs for musicians in their grants programmes⁸. There are 42 recording studios in Vancouver, but many are struggling financially and would benefit from further funding if it was available⁹.

Vancouver is home to Music BC and Creative BC, organisations that are instrumental in recognising and improving the music industry in the province. Creative BC has recently been involved in advising the newly-formed Creative Canada policy framework - a recognition of its significance within the national music industry¹⁰.

Vancouver could benefit from greater partnership opportunities between the music industry and the booming film industry. Vancouver is the 3rd largest film and TV production centre in North America¹¹ and the local music industry could further itself by making use of the proximity to such a successful and globally-recognised creative sector. The Province of BC increased support for the local music industry through Creative BC via the BC Music Fund, now called Amplify BC, which will see CAD \$7.5million invested in the music sector in 2019. Although Vancouver's music scene is in some ways hidden in Canada compared to other major cities, the city has excellent potential and many opportunities through a number of portals.

Now is the time for Vancouver to join fellow cities in developing strategic frameworks for its vibrant music ecosystem, and to position itself firmly as one of Canada's most vibrant music cities.

⁶ <http://dailyhive.com/vancouver/music-canada-vancouver-industry-government-support>

⁷

<http://www.cbc.ca/news/canada/toronto/little-portugal-trinity-bellwoods-most-musicians-canada-1.4112743>

⁸

<https://www.creativebc.com/programs/bc-music-fund#bcmf-sound-recording-program-now-closed>

⁹

<https://musiccanada.com//wp-content/uploads/2016/02/BCs-Music-Sector-From-Adversity-to-Opportunity.pdf> p.41

¹⁰ <https://drive.google.com/file/d/1TrILtU00q9wClCSOkC4pBNbcxw76CfVW/view>

¹¹ <http://www.vancouvereconomic.com/film-television/>

2.3 General Statistics

Population

Vancouver is positioned on the west coast of Canada, within the province of British Columbia, and 24 miles north of the US border. The largest city in British Columbia it is the 8th most populous city in Canada, with a population size of 631,486¹². The city is extremely diverse - 65% typically speak English in their home, and 17% typically speak Chinese¹³. The native language of 52% of the population is not English.

Vancouver is the most densely populated city in Canada, with more than 5,249 people per square kilometre¹⁴.

The survey created by Sound Diplomacy to explore the local music sector shows that Vancouver's music industry respondents are predominantly born in Canada (82.8%). Only 17.2% of the local music operators are foreign immigrants in Vancouver and a quarter of music industry survey respondents are native Vancouverites (26.2%). The majority of music industry respondents have a European ethnicity, mainly from Western Europe and the British Islands (65.3%), and Eastern Europe (9.3%). A total of 13.5% respondents have a mixed ethnicity. 8% of music industry respondents are of Asian background and 1.9% are Black. Aboriginal/Indigenous representation accounts for 1.1%.

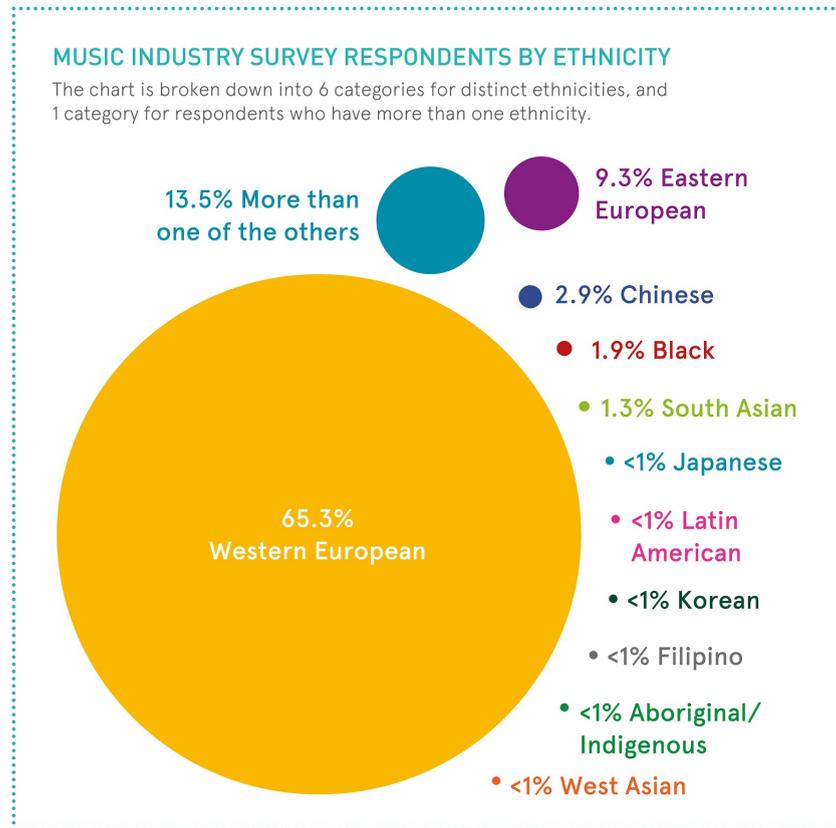
¹²

<http://vancouver.sun.com/news/local-news/new-census-data-population-of-metropolitan-area-of-vancouver-outpaced-national-growth-rate>

¹³ <http://vancouver.ca/news-calendar/population.aspx>

¹⁴ <http://worldpopulationreview.com/world-cities/vancouver-population/>

Figure 1. Music industry survey respondents by ethnicity.



Economy

Vancouver experienced significant economic growth in 2016. 60,000 new jobs were created, as well as 27,000 new housing projects. The strength of the economy can mostly be attributed to the successful finance, insurance, real estate and construction industries. Vancouver also boasts strong tourism, high-tech and film industries, which play an important role in the city's economic growth¹⁵.

¹⁵ <https://biv.com/article/2017/01/vancouvers-economy-fire>

3. Vancouver's Music Economic Impact

3.1 Methodology

For our economic impact report, we used a mix of SOCAN data, survey data, Google trends and data from Statistics Canada from 2004-2017. Our economic assessments were based on the incomes earned in each sector, a conservative element because it ignores the profits that are either retained within the businesses, or paid out in tax or dividends to shareholders. We use an approximation of methods originally proposed by Leontief and widely used to derive impact assessments.

To identify the economic impact of the music sector in the city we used three main data sources. First, SOCAN, second Statistics Canada from 2004-2017 and third the aforementioned survey mixed with data provided by Google trends.

To calculate the impact of the music value chain and its transactions with other sectors (indirect impact) the input-output model and Leontief matrix were used. For this, it was necessary to calculate the Gross Value Added, GVA, multiplier for the music sector in the city using an alternative statistical method that satisfied our technical needs in terms of granularity (geographical level).

First, we based the calculation of model on the annual time series of GVA released by Statistics Canada for the national level and provinces providence level segregated by the three high-level business sector: Entertainment, Support (including Hospitality and Education), and Halo (all the remaining sectors excluding Mining and Agriculture). The high-level economic data was projected (retropolate) to a more granular level using statistical methods termed "Nowcasting" that construct representative indices from a set of secondary data sources.

3.2 Employment impact

We discovered through our survey that the Music Creator-Music Service/industry ratio is 1 to 3.91, which means that for each creative producer 3.91 people are working in the further music value chain. According to our calculation, there are 7,945 direct music jobs in Vancouver. We took into account musicians and composers, festivals and their employees, venues and their staff, music teachers, music publishers, studios & sound engineers, managers and labels, music press and marketing as well as music in film and theatre. Because the Economic impact of Live Music in BC¹⁶ report looks at only the live

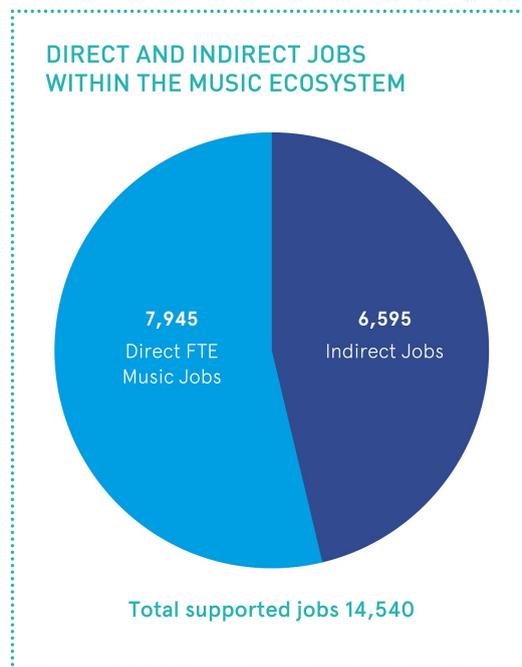
¹⁶

<http://musiccanadalive.ca/wp-content/uploads/2018/05/Here-the-Beat-The-Economic-Impact-of-Live-Music-in-BC.pdf>

business and not the whole music ecosystem, its figure of 6,950 jobs in BC is less than ours.

For each additional entertainment job generated within Vancouver, a further 0.83 are supported. This estimate is derived by using the conventional method for the calculation of multipliers based upon the Leontief Matrix. We use a combination of Google trend data and Statistics Canada to derive an estimate of the intermediate demand matrix required for this process. This means that the music ecosystem generates 6,595 indirect jobs. Indirect jobs are those which are an output of additional jobs and made possible by the music ecosystem, but not as a direct output of the music ecosystem itself. For example, subcontractors that do construction at a venue, or food suppliers for caterers at festivals. The total number of jobs supported by the music ecosystem is 14,540.

Figure 2. Direct and indirect jobs within the music ecosystem



Average income of employees in Vancouver is CAD \$49,702¹⁷. Musicians represent less than a quarter of the jobs within the music sector. While they are extremely important for the vibrancy of Vancouver’s music ecosystem, artists’ annual income ranks lowest among the music sectors at CAD \$18,178, according to our survey. Average income in the music venue industry is similar to the Vancouver average, at CAD \$51,000, while earnings in the festival

¹⁷ <http://www5.statcan.gc.ca/cansim/a26?lang=eng&id=2820072>

business are above average, at CAD \$65,000. This shows that the music industry helps to create thousands of well-paying jobs for Vancouver. Each sector within the ecosystem contributes in a distinct way to Vancouver's music economy (See Figure 22).

As is common across other economic impact reports, artists are the lowest ranking sector within a music ecosystem, but in Vancouver, the average income of musicians is even below the national average of CAD \$22,770¹⁸. Usually Vancouver income ranks above the Canadian average¹⁹. In Montreal, independent performing arts workers, such as artists and authors, receive an average income of CAD \$23,500 per year²⁰. Given that Vancouver is an expensive place to live, this makes it even harder for artists to live and stay in Vancouver without another job.

While the income for musicians may not be high, for 44.72% of artist survey respondents it is on the rise. 12.6% of artist respondents say their income grew by more than 25% in the past 12 months and for 33.6% it stayed the same as last year. This trend matches the other music industry respondents. For 50% of professionals, income grew compared to last year, as well as for 66.6% of the businesses.

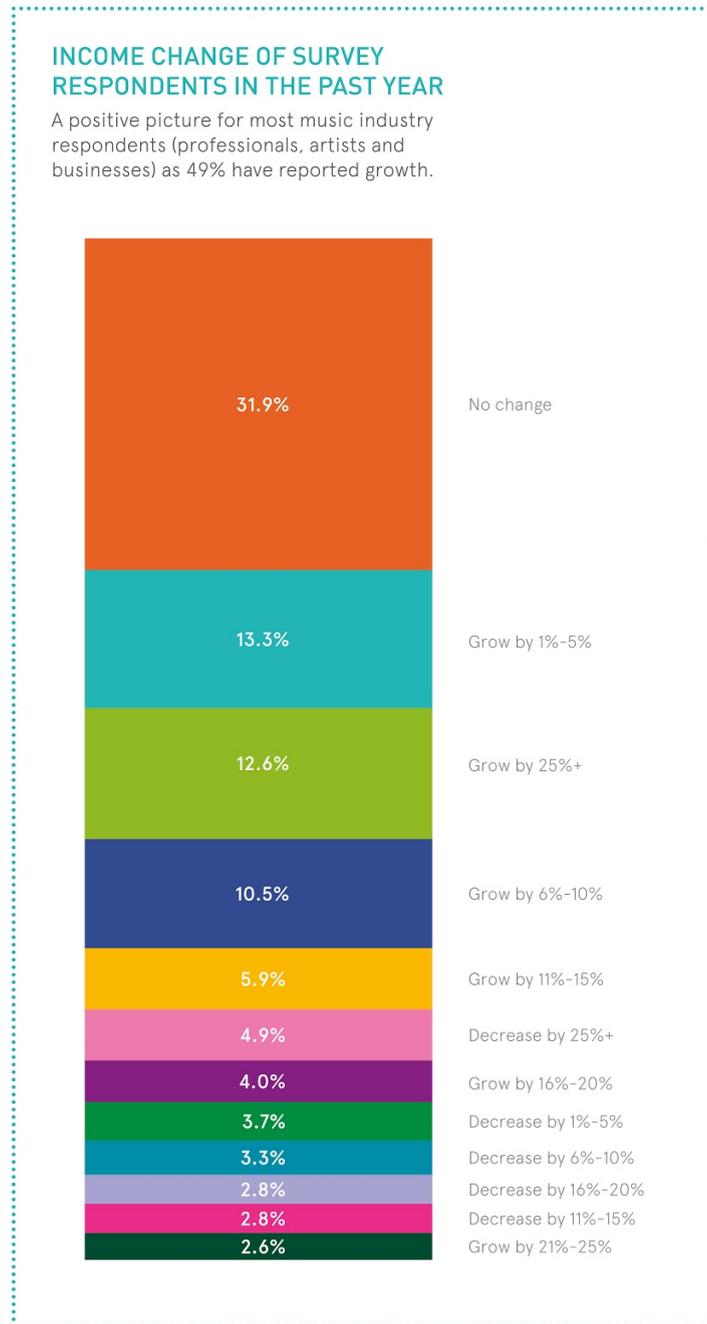
In general, income rose for 48.6% of all survey respondents and stayed the same for 31.9% of them. For 12.6% of the overall respondents, income rose by more than 25% compared to last year.

¹⁸ <http://www.hillstrategies.com/content/statistical-profile-artists-and-cultural-workers-canada>

¹⁹ <https://www.statcan.gc.ca/daily-quotidien/170913/dq170913a-eng.htm>

²⁰ *Ibid.*, pg. 15

Figure 3. Income change of survey respondents in the past year



We have estimated the music ecosystem’s employment impact for Vancouver, taking into account the direct and indirect jobs, to be over CAD \$520million per year. The digital entertainment & interactive sector which includes Visual Effects (VFX) & Animation, Film & TV Production, Video Game Development, VR and other Interactive Media, generates approximately 40,000 jobs in Vancouver. This sector is one of the focus areas of the

Vancouver Economic Commission. With a large number of branches in the digital entertainment & interactive sector, the figure of almost 15,000 jobs generated through the music ecosystem seems quite high in comparison.

3.3 Additional Economic Revenue

The economic impact data of Live Music in BC report²¹ shows festivals make an average of \$700,000 annually, promoters make slightly under \$250,000. Our economic impact study shows that if we zoom into Vancouver, the additional impact generated by musicians, music festivals and venues is more than CAD \$172million per year. The economic impact of festivals in the city (CAD \$55million) is noticeably low compared to the province, since 38 festivals are counted to take place in the city (see section 3.5), whereas more than 400 happen in the British Columbia. Most people that attend music festivals in Vancouver are locals. This sector could develop into an area of huge growth which would have an impact particularly on the tourism sector, but also within the music ecosystem.

In 2017 alone, SXSW's economic impact on the Austin economy totalled CAD \$348.6million.²² Music festivals such as Primavera Sound in Barcelona generate CAD \$144million, and smaller city festivals like Iceland Airwaves generate more than CAD \$20million.²³ The DE&I sector has, with SIGGRAPH, developed an international event on computer graphics and interactive techniques that attracts close to 15,000 attendees. Home-grown conferences and festivals from the DE&I sector continue to emerge and draw impressive crowds, year after year. The Vancouver International Film Festival (VIFF), SPARK FX, External Development Summit (XDS), and Canada's largest VR conference, Vu, are a few examples of local events that attract a global audience.²⁴ If Vancouver would invest in a music festival and/or conference in the same way, the return on investment could be huge.

²¹

<http://musiccanadalive.ca/wp-content/uploads/2018/05/Here-the-Beat-The-Economic-Impact-of-Live-Music-in-BC.pdf>

²²

<http://explore.sxsw.com/hubfs/2017%20SXSW%20Economic%20Impact%20Analysis.pdf?submissionGuid=e1252ab2-1625-4066-9abb-b00c2b776e43>

²³ <http://uton.is>

²⁴ <http://www.vancouvereconomic.com/focus/digital-entertainment-interactive/>

Table 1. Additional Economic Impact with artists, festivals and venues



3.4 Economic Impact

Our calculations show that the economic impact of music, including employment and additional revenue, is over CAD \$690million in Vancouver. The indirect music impact GVA is estimated to be over CAD \$1.5billion, which adds up to a total of over CAD \$2.2billion.

We calculate the GVA multiplier (see methodology) and in this case it reached 2,2, which means that for each Canadian Dollar invested in the music sector in the city, there is an additional value-added approximately \$2,2 CAN, therefore the indirect impact of the music sector in the city reach 220% of its own value. The indirect impact occurs due to the increased demand for products and services in sectors outside music that arise because of the increased music availability. For example, additional transport services, extra tourist provision, further activities and shopping that occurs in the area due to music attendance, and - most long term - people who take up new jobs in the area because it has become a location they wish to live in.²⁵

While different sources and methodologies have been used in economic impact reports for other cities, we would like to put the Vancouver findings in perspective. In the city of Austin, with a population of almost 1 million, the collective impact of music and music-related tourism exceeds CAD \$2.3billion annually, and over two-thirds of the jobs are associated with the tourist side of the equation, up from 56% in 2010. This shows the

²⁵ <https://www.investopedia.com/terms/i/input-output-analysis.asp>

huge effect that music tourism can have on a city. The numbers that we calculated don't include all music tourism related numbers - only the festivals were taken into account.²⁶

The city of Seattle estimates that 16,607 people are directly employed in the music industry, creating a total of CAD \$2.3billion in direct economic output.²⁷

²⁶<http://austinmusicpeople.org/wp-content/uploads/TXP-Austin-Music-Impact-Update-2016-Final.pdf>

²⁷<http://fairtrademusicseattle.org/wp-content/uploads/2017/05/Economic-Impact-Study-FINAL-11-18-2015.pdf>

3.5 Music Infrastructure

Figure 4. All Music Assets in Vancouver. All the assets will be detailed later

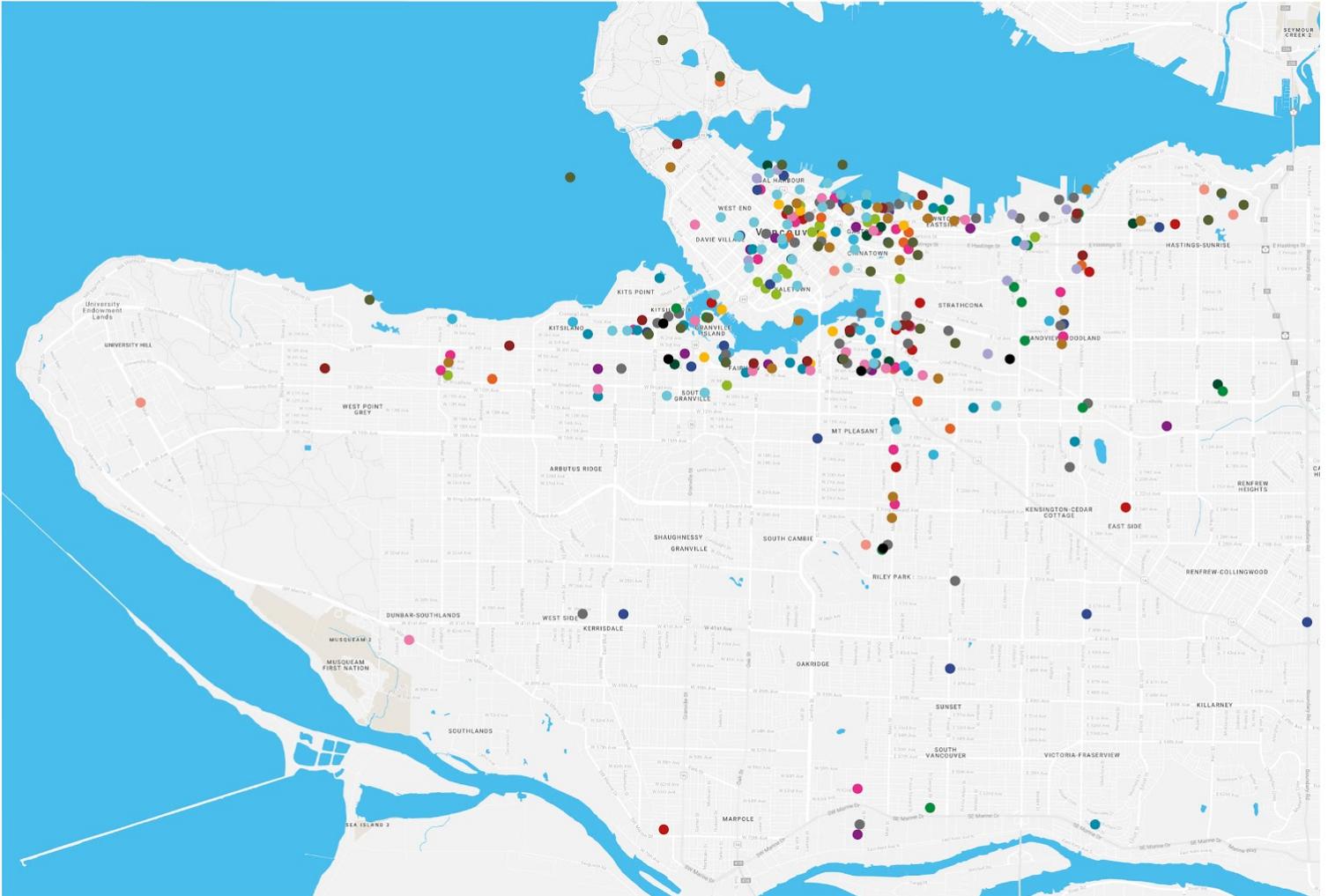
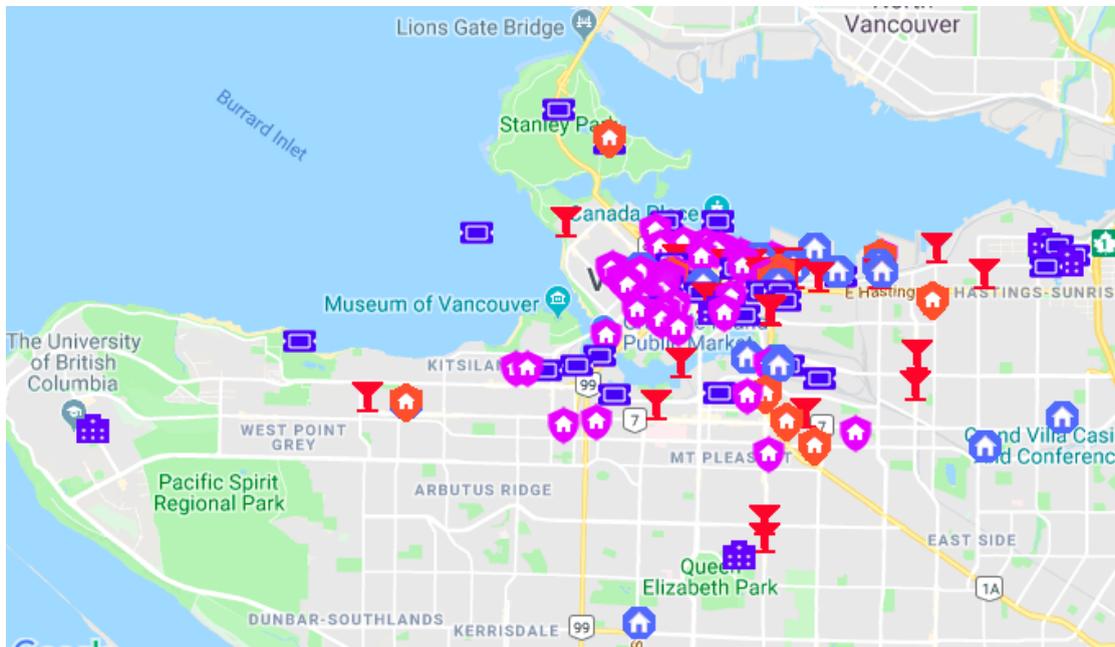


Figure 5. All Music Venues and Festivals in Vancouver



Vancouver has: 11 grassroots music venues, 58 night clubs, 27 bars or restaurants with live music, 6 arenas, 13 multi-arts venues where music takes place, and 17 occasional venues (galleries, warehouses, community centres, etc). There are also 38 music festivals.

In addition, we've mapped 15 music venues that have closed in the past 35 years.

Figure 6. Closed Music Venues

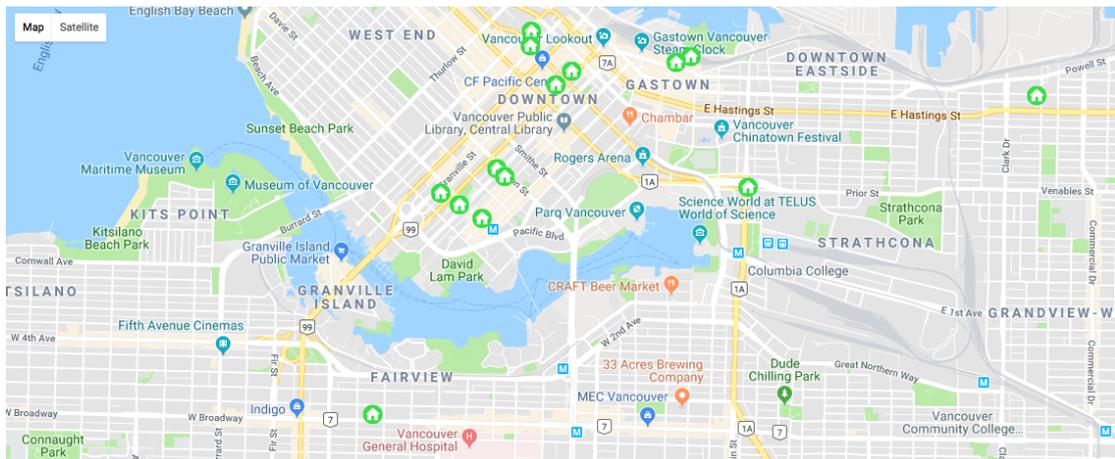


Figure 7. Closed Venues and Actual Grassroots Music Venues

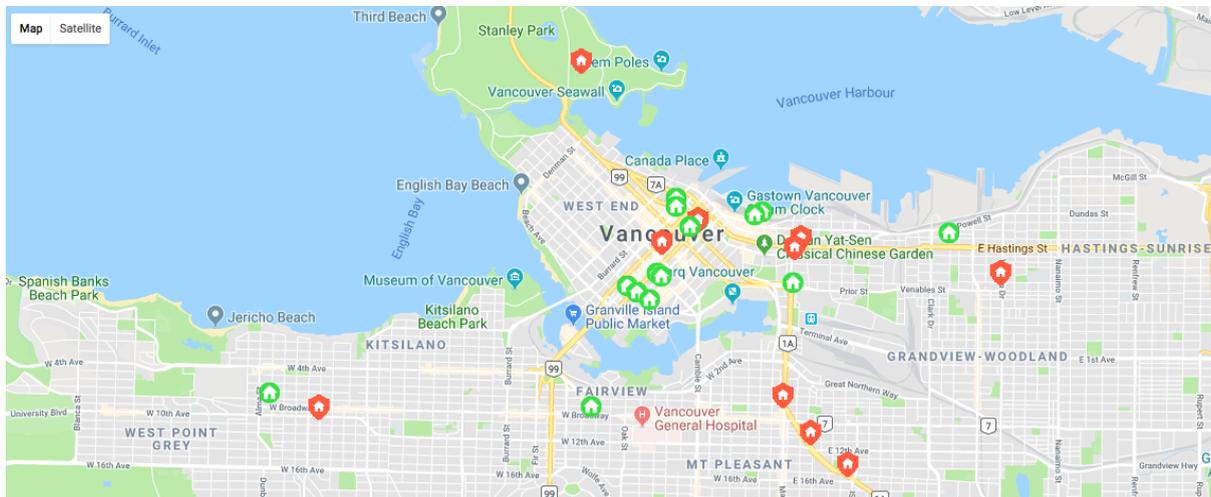
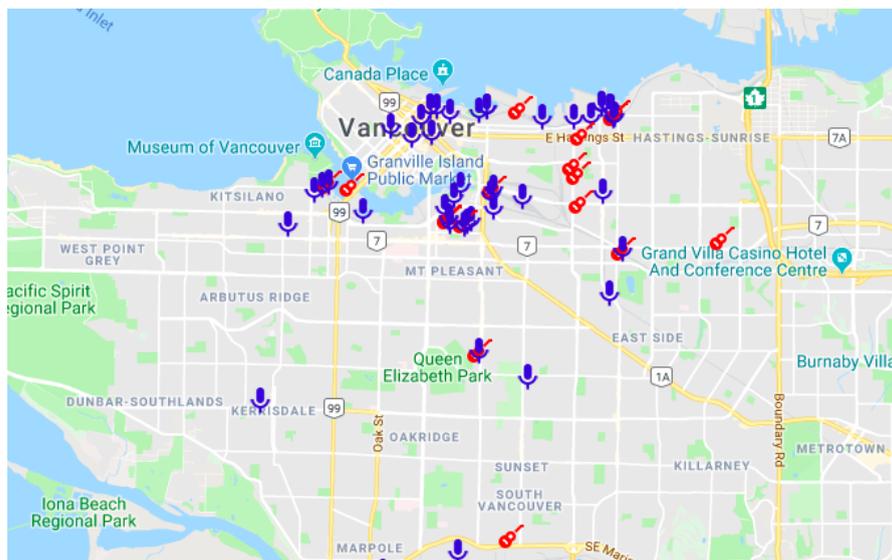
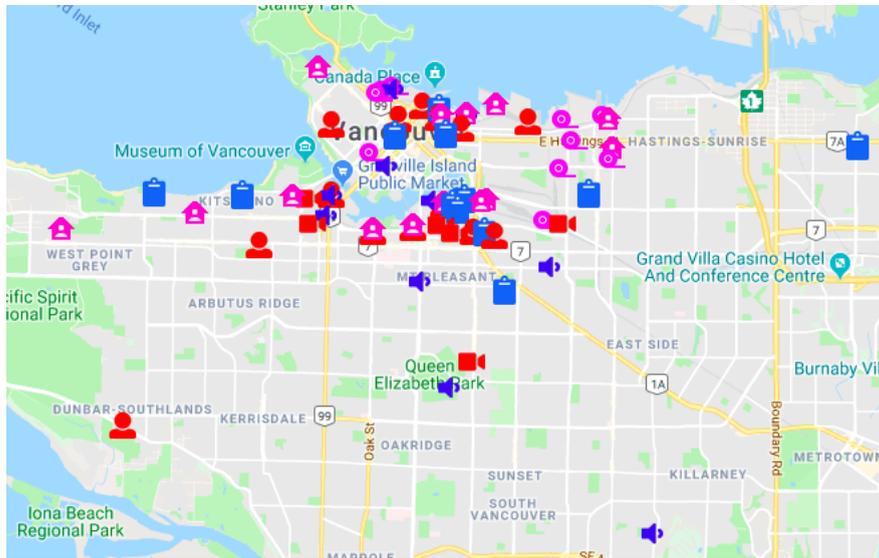


Figure 8. Recording Studios and Rehearsal Spaces in Vancouver



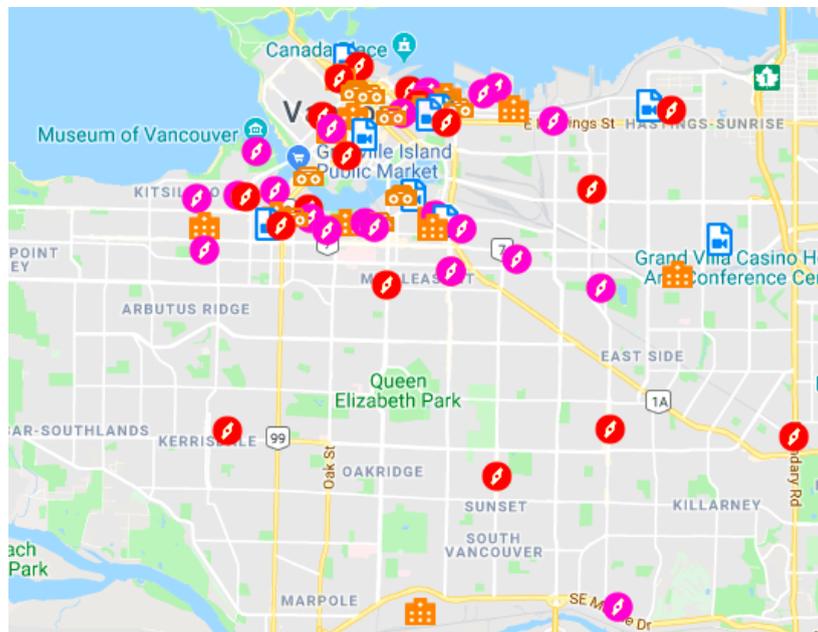
Vancouver musicians can avail themselves of a total of 54 dedicated recording studios and 18 rehearsal spaces (some of which are inside public or private educational organisations, such as the Vancouver Civic Theatres or the Vancouver Library).

Figure 9. Music Industry in Vancouver



In terms of industry support, we have identified 20 music management companies, 38 record labels (most of them also covering promotion, publishing and sync), 16 music promoters (also covering the PR themselves in most cases), 19 music production companies plus 6 post-production companies, and 22 other business, such as accountants and publishing companies.

Figure 10. Music Associations, Media, Radios and Presenting Organisations in Vancouver



There are 39 presenting organisations in Vancouver. We also found 19 music-related associations and non-profits. There are 18 radio stations operating out of Vancouver, and 13 media companies.

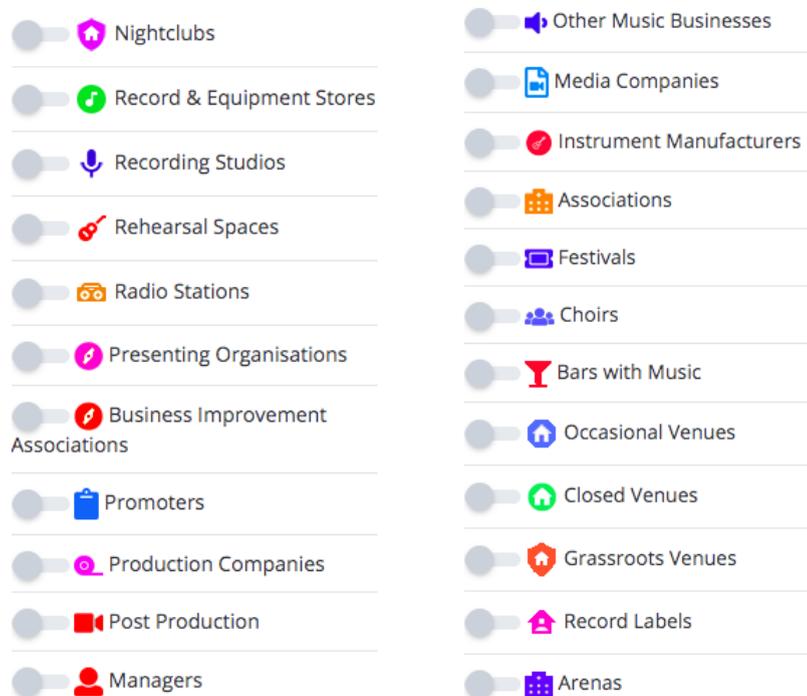
Vancouver has 45 music and music industry education facilities.

Figure 11. Record and equipment stores and instrument manufacturers in Vancouver



We've identified over 22 record and music equipment stores (including large chains and department stores), and 16 instrument makers and suppliers.

Figure 12. Maps legend



4. Comparative Analysis

The following is a summary of Appendix C, which is a more detailed version of a comparative analysis of Vancouver against the following cities: Toronto, Seattle, Brisbane, Montreal, and San Francisco.

These cities share some similarities with Vancouver, not necessarily in terms of their music ecosystems, but in terms of their social composition, urban challenges, size and population, and geographical and political characteristics. The analysis examines these cities across a set of parameters: music ecosystem, transport, licensing and zoning, health and safety regulations, and grant systems; and contrasts them with Vancouver.

General

Although most of the cities listed [in Appendix C] were able to estimate the economic impact of their cultural industries, few have done extensive research to quantify their music or cultural industries. Vancouver (thanks to the Province of British Columbia) and Seattle are leaders here, tracking detailed statistics such as the number of jobs supported and the amount of self-identifying artists in the area.

All of the cities listed act as provincial or regional hubs for music industries, but none of them are national meccas. This means they share similar problems of local artists leaving once they reach a certain level and can't progress in their local industries. The biggest challenges Vancouver shares with other cities facing musical exoduses are the lack of mid-level venues (for artists between open mic and arena levels) and insufficient numbers of local music professionals (managers, agents, labels, etc).

Transport

All cities analysed have international connections through major airports, well-connected via public transport to downtown areas.

Most city buses run from approximately 5am until 1am, although Vancouver's public transport runs from approximately 4.45am until approximately 1.40am, making it a leader in daytime transport. It also has a night bus service, but the routes serve limited suburban areas, and taxis struggle to account for the service gap. The absence of app-based taxi services (Uber, Lyft) is exacerbated by the pressure on city-wide taxis, which are subject to a moratorium on new licenses and regulations on permitted pick-up zones.

A few cities operate extra services in high-traffic areas, such as downtown districts and tourism-heavy zones. One such example is Brisbane’s CBD, which has a free bus circuit during the daytime and a free ferry service around the Fortitude Valley Entertainment Precinct peninsula.

Vancouver’s inter-city transport is on par with the international comparisons, but it also presents familiar struggles. These cities are all similar in terms of country size and distance between other major cities in their countries. One of the challenges for Vancouver artists is the cost of touring nationally, let alone internationally, due to the distance between cities. This is something Australian artists have also struggled with, as noted by Brisbane’s professionals. The geographic layout makes touring time-consuming and costly, and unattainable for amateur artists with limited funds. This can act as yet another incentive for artists to move to the bigger ‘industry hub’ cities to maximise their time (such as Toronto in Vancouver’s case, or Melbourne in Brisbane’s case).

Health and Safety

Safety at venues and music events in Vancouver is ensured through standard measures of hiring security guards and creating evacuation plans. No singular initiatives have been identified that specifically consider the safety of minorities - for example anti-harassment campaigns and staff gender ratio checks at events in Montreal - or focus on rising terrorism at public events. However, the Good Night Out Vancouver anti-harassment campaign has been running since 2015, working to create a safer environment in clubs and bars, particularly for women and LGBTQ people²⁸.

San Francisco and Seattle have the lowest unemployment rates of the cities listed (3% and 3.7%, respectively). Vancouver comes in third, at 4.7%.²⁹ There is an opioid problem in Vancouver - 216 overdoses were recorded in 2016³⁰. There are plans to legalise recreational marijuana in British Columbia,³¹ although this has not yet been passed it would mean that Vancouver will be following cities such as Seattle and Montreal in working out the terms of its use.

²⁸ <https://www.goodnightoutvancouver.com/>

²⁹ Statistics Canada (2017) “Labour force characteristics, seasonally adjusted, by census metropolitan area (3 month moving average) (Abbotsford-Mission (B.C.), Vancouver (B.C.), Victoria (B.C.))” online at <https://www.statcan.gc.ca/tables-tableaux/sum-som/l01/cst01/lfss03l-eng.htm> accessed 29-1-2018

³⁰ The Vancouver Police Department(2017). *The Opioid Crisis. The need for treatment on demand* <http://vancouver.ca/police/assets/pdf/reports-policies/opioid-crisis.pdf> accessed 24-5-2018

³¹ Meissner, Dirk (2017) “B.C. Releases Plan For Legal Marijuana” online at http://www.huffingtonpost.ca/2017/12/05/b-c-releases-plan-for-legal-marijuana_a_23298196/ accessed 29-1-2018

NB: Since the writing of this report, the Canadian Senate has approved legislation to legalise recreational marijuana. It is believed it will come into motion in 2-3 months' time.

Zoning

Of the cities listed, only San Francisco has introduced Agent of Change, although other cities are considering it. Brisbane, Montreal and Toronto each have recognised entertainment districts and passed special sound laws and planning protections built around existing clusters of venues and entertainment. While Vancouver does have Granville Entertainment District, its separation from greater city planning is marked by more restrictive laws, such as an undefined status of venues within the legal structure (due to outdated policies which only recognise nightclubs and theatres). This translates to confusing and slow permitting processes and sound mitigation. The best example of a supportive entertainment district is that of Montreal's Quartier des Spectacles in Plateau-Mont-Royal, not only in terms of its physical infrastructure but also for its licensing process (the conditions that must be met for a space to be a licensed 'venue').

NB: Since the writing of this report, the City of Vancouver has announced updates to liquor policies and sound bylaws. Arts and Cultural events are now able to serve alcohol until 11pm within their establishments, and live music can now run until 1am in food and liquor establishments³².

Grant System

One of the biggest issues raised by the initial review of Vancouver's artists was a lack of funding, especially compared to Ontario. Music BC provides province-wide grants for travel and touring (for artists and professionals) and has a dedicated budget to coordinate workshops, training, live performances, and to support recording and development costs. There are also a few schemes through the City of Vancouver, including subsidised housing, and support for venue infrastructure developments.

This structure is in line with those of the comparator cities, city, province and national budgets as well as dedicated arts council and local non-profits funding.

In terms of how the funding is divided and made accessible to different sectors of the industry (amateur artists, professionals, non-profits, venues etc), Vancouver is well-placed. However, the amount of total funding available falls below that of other provinces, such as Ontario, which is often cited by artists leaving British Columbia for the

³²

<http://vancouver.ca/news-calendar/updated-liquor-policy-increases-support-for-businesses-cultural-organizations-and-public-health.aspx> Accessed on 24-5-18

eastern province. There is a need for more practical support, not necessarily fiscal, such as Seattle's initiatives which offer artists legal advice, housing support, healthcare access and insurance. The City of Vancouver's mandate is for NPOs, therefore access to funding for the commercial sector is virtually non-existent. Provincial funding is limited. The City of Vancouver is governed by the Vancouver Charter, which does not allow the City to provide grants to for-profits or individuals. The City of Vancouver awarded 8.82% to operating grants, 18.41% to project grants, 15.21% to annual assistance grants, and 12.4% to community arts grants.

Summary

Overall, Vancouver can look to a few cities for examples of initiatives and strategies to help its music industry. The biggest gaps, as compared to the cities listed above, are funding opportunities and the lack of streamlined licensing procedures. Not only does this hurt local artists and businesses in their own symbiotic relationship, it impacts music tourism figures because visitors are limited by the live music offer. Funding opportunities are important across all levels and sectors, and will keep artists in Vancouver longer if they can continue to grow their careers there without having to move to a larger industry hub. It's worth working closer with leaders such as Toronto or Melbourne for best practice examples.

5. Interview and Survey Findings

In November 2017 and January 2018 we conducted a series of interviews and roundtables to discover more about Vancouver's music ecosystem, looking at challenges and opportunities for the city.

We spoke to over 120 stakeholders, including: artists; education; live industry; the alternative and underground scenes; recorded music; music associations; music technology; members from City Hall cultural services, planning and zoning; recording studios; media; choirs; event production; and overall music industry professionals to explore the following topics:

- Spaces and places
- Education
- Governance and leadership
- Artist development
- Professionalisation of the music industry
- Audience development
- Local involvement
- Music tourism
- Night-time economy
- Future perspectives for the Vancouver music ecosystem

We also conducted a survey responded to by 862 people self-identifying as being from Vancouver. A total of 557 surveys were completed and have been analysed by Sound Diplomacy in this report. A map of the postcode locations of self-identified Vancouver respondents can be found [here](#). Please note that some postcodes are located outside Vancouver, because respondents may have provided their residential postcode but identify themselves as Vancouver residents for other reasons.

Figure 13. Map of respondents identified in Vancouver

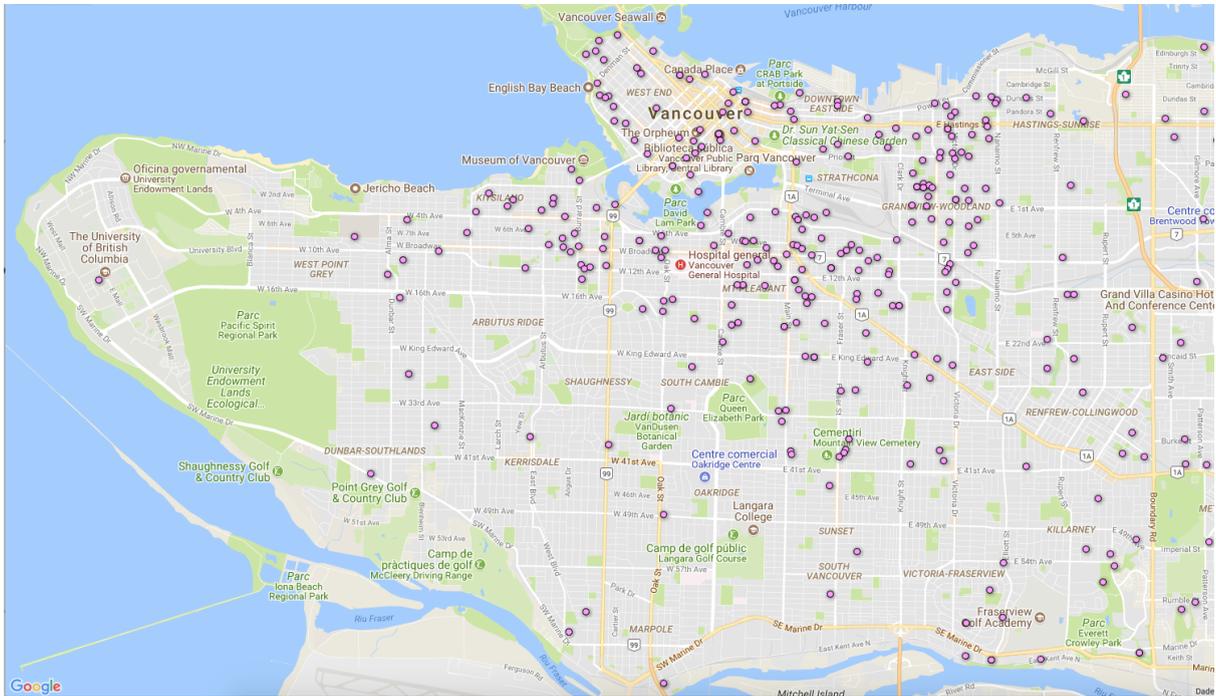
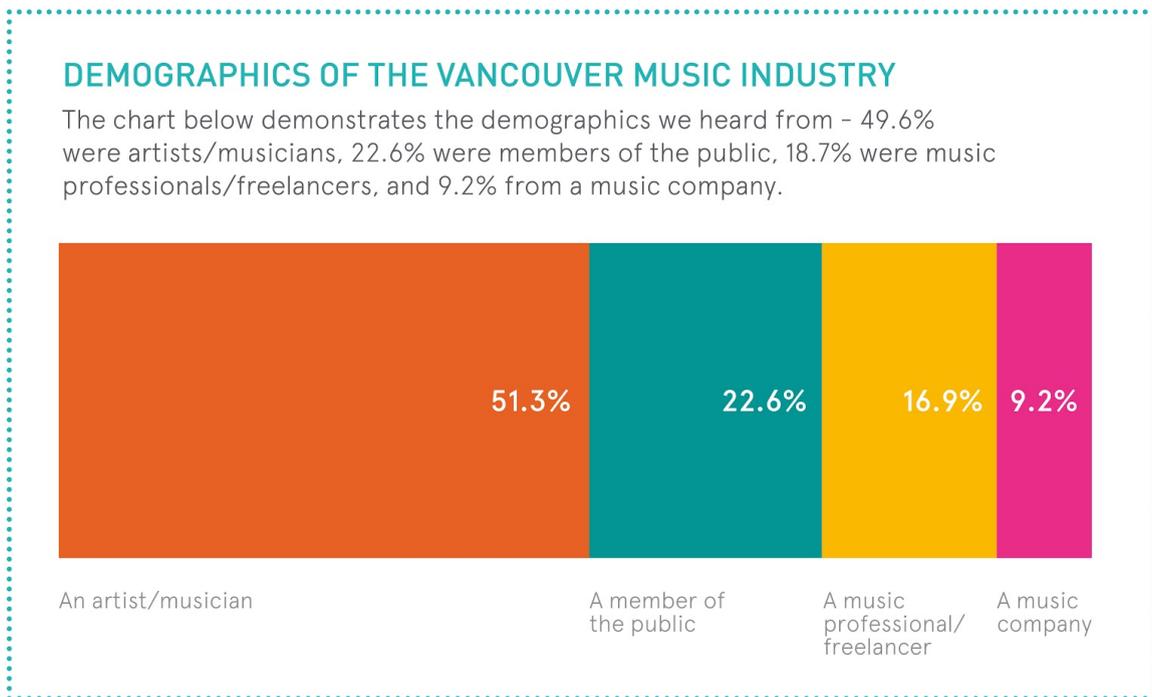


Figure 14. Demographics of the Vancouver music industry



A total of 431 respondents belong to the Music Professional/Freelance (94 count), Artist/Musician/Performer (286 count) and Music Business (51 count) categories, which we will refer to as the group ‘music industry respondents’ from now on. This is 5,24% respondents of the direct music ecosystem.

5.1 Key Findings

From our conversations, research and survey, we have created a list of the key findings to demonstrate some of the obstacles that the Vancouver music industry is facing. These are:

- **Governance and Leadership:** There are a number of bureaucratic obstacles associated with licensing, permits, company registration and bylaws. These need to be clearer and more flexible for the range of events that could be held, and there needs to be accessible advice for those unsure of how to navigate the processes. There are limitations around grants, and not all genres are fairly represented in grant awards - 60.8% of artist respondents are not in receipt of grants.

- **Spaces and Places:** The cost of living and affordable rehearsal spaces is preventing musicians from being able to focus on their work. There are many non-traditional spaces that could be utilised for rehearsal space, and there's a noticeable lack of awareness of what artists and organisations have available to them in the city - 76.6% of respondents feel there aren't enough venues for emerging artists.
- **Night-Time Economy:** There are limited transport options around the city late at night. Curfews in high-activity areas push people onto the streets at the same time, trying to find their way home and causing nuisance to residents. This, and obstacles with permits, leads to fewer live music events being hosted, and attended.
- **Music Education:** There is a lack of direction to music education in compulsory learning, and poor funding for student programmes in schools (from kindergarten to 12 years old). Youth outreach is needed in order to increase younger generations' interest in local music, through mentoring, after-school programmes, and training.
- **Artist Development:** Artists are unable to sustain a lifestyle purely through their music - 22.7% of respondents only earned CAD \$999 from their music last year. More support (both advisory and monetary) is required in terms of visas, marketing and promotion outside of the city.
- **Professionalisation of the Music Industry:** There is a need for mentoring and workshops to help music professionals expand their businesses and continue to thrive in the local and international music industry. Almost half of the music professionals/freelancers (42.5%) do not have any music industry training, a situation common among artists/musicians/performers (46.5%). There is also a high demand for cross-sector collaboration.
- **Audience Development:** There is interest in creating initiatives to improve transport, and to make tickets more affordable. Utilising local media and increasing diversity of audiences were key points - 'word of mouth' is the most used form of promotion by music industry respondents (22.9%) while only 5.52% use local radio.
- **Local Involvement:** Cost of living, curfews and ticket prices are problems - 99.2% of respondents view cost of living as a major challenge. Better dialogue between the City and the music industry would improve local communities involvement in the local music scene.
- **Music Tourism:** The growing tourism industry should develop robust infrastructure to link it more effectively to the music industry. There needs to be more promotion of music events to encourage music tourists - 74% of festival goers come from local

communities. Tourism Vancouver bases most “promotions” on filling up hotel rooms and doesn’t promote many music events during peak festival season.

- Future Perspectives: There are a number of opportunities to utilise non-traditional spaces to create community hubs for all ages. There are also many cross-sector opportunities, particularly with the growing Virtual Reality industry.

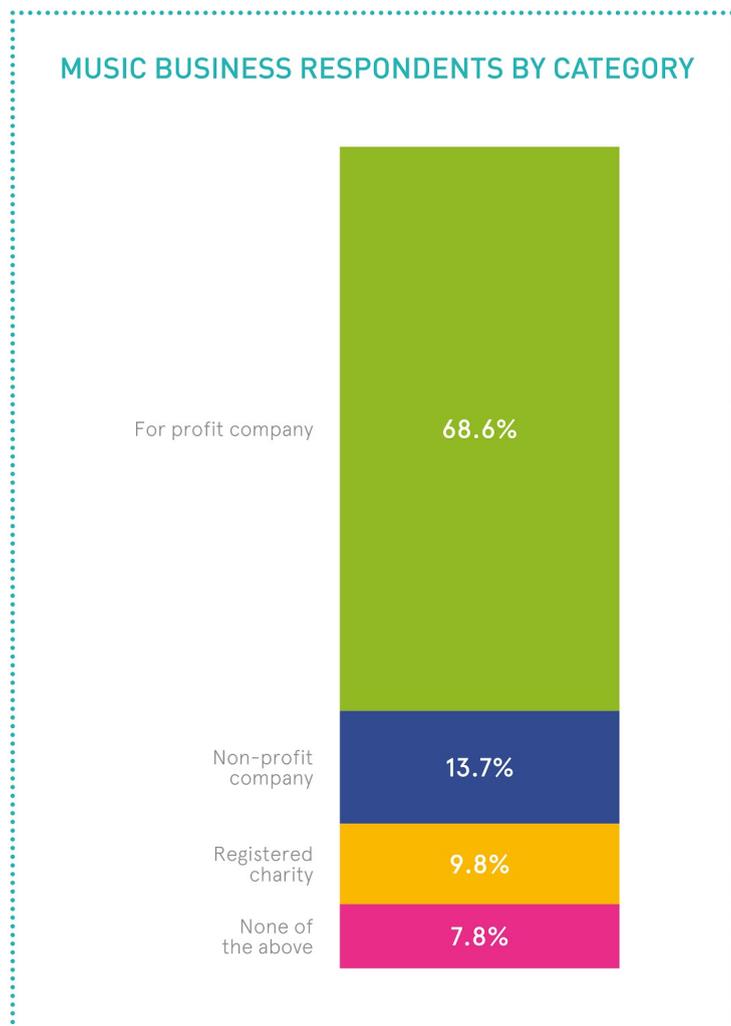
Municipal support

The City of Vancouver and Vancouver Park Board work together to fund a number of different individuals, organisations and institutions. CAD \$11million is for grants that can cover: studio costs, community projects, work that celebrates and promotes Vancouver neighbourhoods, youth-based projects, cultural space fee assistance, and match funding³³. Operating and project funding for live music presenters operating from non-profit organisations are also eligible for such funding.

Non-profit organisations have access to these grants, which can cause an imbalance for private companies. Although our survey found that for-profit companies are the most popular structure among local music industry respondents - representing over 68% of all businesses (as seen in the chart below) - they don’t receive the same benefits as non-profits.

³³ <http://vancouver.ca/people-programs/arts-and-culture-grants.aspx>

Figure 15. Music Business respondents by category. The chart below shows the breakdown of survey respondents from music businesses by category: For-profit company, Non-profit company, Registered charity, None of the above.



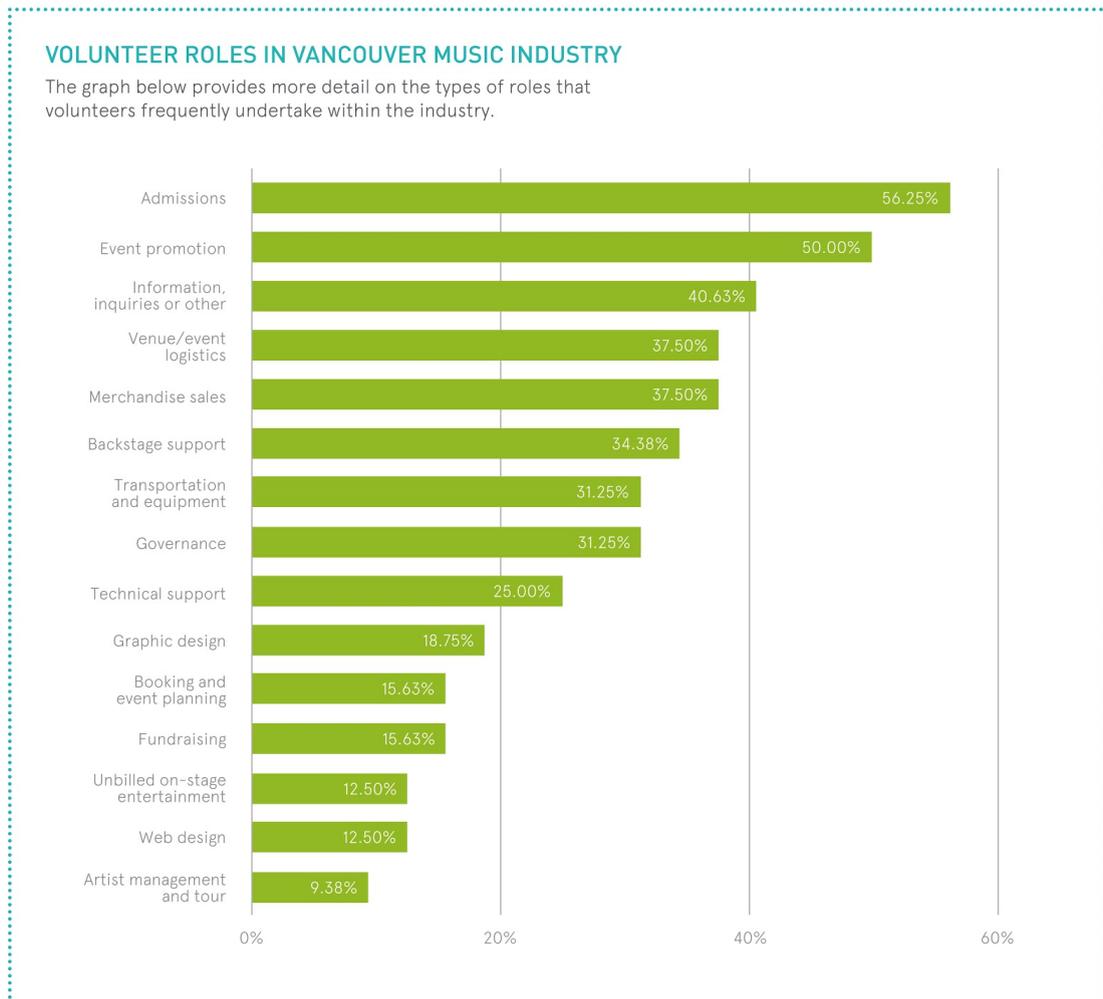
Producing music events requires a complicated process that spans different departments within the City. Applications to use most public spaces available are either through grants and/or permits available only to non-profits³⁴. Other benefits for non-profits are training courses and subsidies for operating funds³⁵. Some non-profits, however, believe this system encourages a culture of volunteering and underpaid work, developing a funding-dependent ecosystem. Volunteering is widely spread among for-profit and non-profit companies: 62.7% of Vancouver music company respondents are supported by unpaid workers. More than half (58.3%) of all non-profits and registered charities use volunteers, which is similar to for-profit companies (51.4%) and other categories of

³⁴ <http://vancouver.ca/people-programs/arts-and-culture-grants.aspx>

³⁵ <http://vancouver.ca/files/cov/vancouver-art-culture-grant-programs-list.pdf>

companies (50%). Tasks most frequently carried out by volunteers are admissions (at 56.2% of companies with volunteers) and event promotion (50%). The least common tasks performed by volunteers are artist management/tour planning (9.4%), web design (12.5%) and unbilled on-stage entertainment (12.5%).

Figure 16. Volunteer roles in Vancouver music industry



Theatre rental grants and other grants are articulated through cultural policy for non-profits³⁶. Although grants exist for venue hire, infrastructure, and permits (to name only a few), there are limitations to who can apply. For example, most funding programs available for the music sector are project-based³⁷, which caps the infrastructural growth of local artists and organisations. It was suggested that a change in the support and grants systems should be developed along with improved communication between the government and the creative community. ‘Increasing the variety of grants that artists and companies can apply for’ was given in many responses categorised as ‘Other’ in the survey, such as creating grants for older but inexperienced musicians, grants for music video production, more recording grants, and rent subsidies for touring musicians. Other responses mentioned accessibility challenges and the prevalent gender imbalance in the local music scene in different contexts, including the incompatibility of work/life balance. The complex requirements of support programmes from the provincial and national level were said to benefit bands and companies which already have the resources to grow. In addition to this, some participants believed that government support favours mainstream genres (pop, rock and indie) to the detriment of artists and professionals working in jazz, folk, world music and other less commercial genres. Other issues affecting the social aspects and accessibility in the ecosystem were generally rated as positive or neutral by respondents.

Other limitations mentioned by interviewees were that genres such as hip hop and rap are barely represented in grant awards (around CAD \$17,000 for sound recording grants out of over CAD \$200,000), and that key funding opportunities such as the Critical Assistance Grants provided by the City were inaccessible for virtually all organisations operating in Vancouver, since they require a 10-year lease³⁸. Almost two-thirds of Vancouver artists in our survey (60.8%) had not received any grants for their music. The reasons given were evenly split between not knowing where or how to apply, and consciously deciding not to apply. This is particularly the case for the Vancouver Chamber Choir - one of the most successful choirs in North America. It is eligible for Music BC funding, but interview participants were unaware of this. The Vancouver Charter prevents the City from funding individuals due to the language of the document; regarding eligibility, it only refers to groups and organisations - there is no mention of grant-giving for individuals³⁹. We also found through survey data that the areas that would have the most impact through additional support from the provincial/city government are: operational or performance grants (as agreed by 86.2% of music industry respondents); and support for local venues (agreed by 78.4%).

³⁶ <http://vancouver.ca/files/cov/culture-grants-theatre-rental-guidelines.pdf>

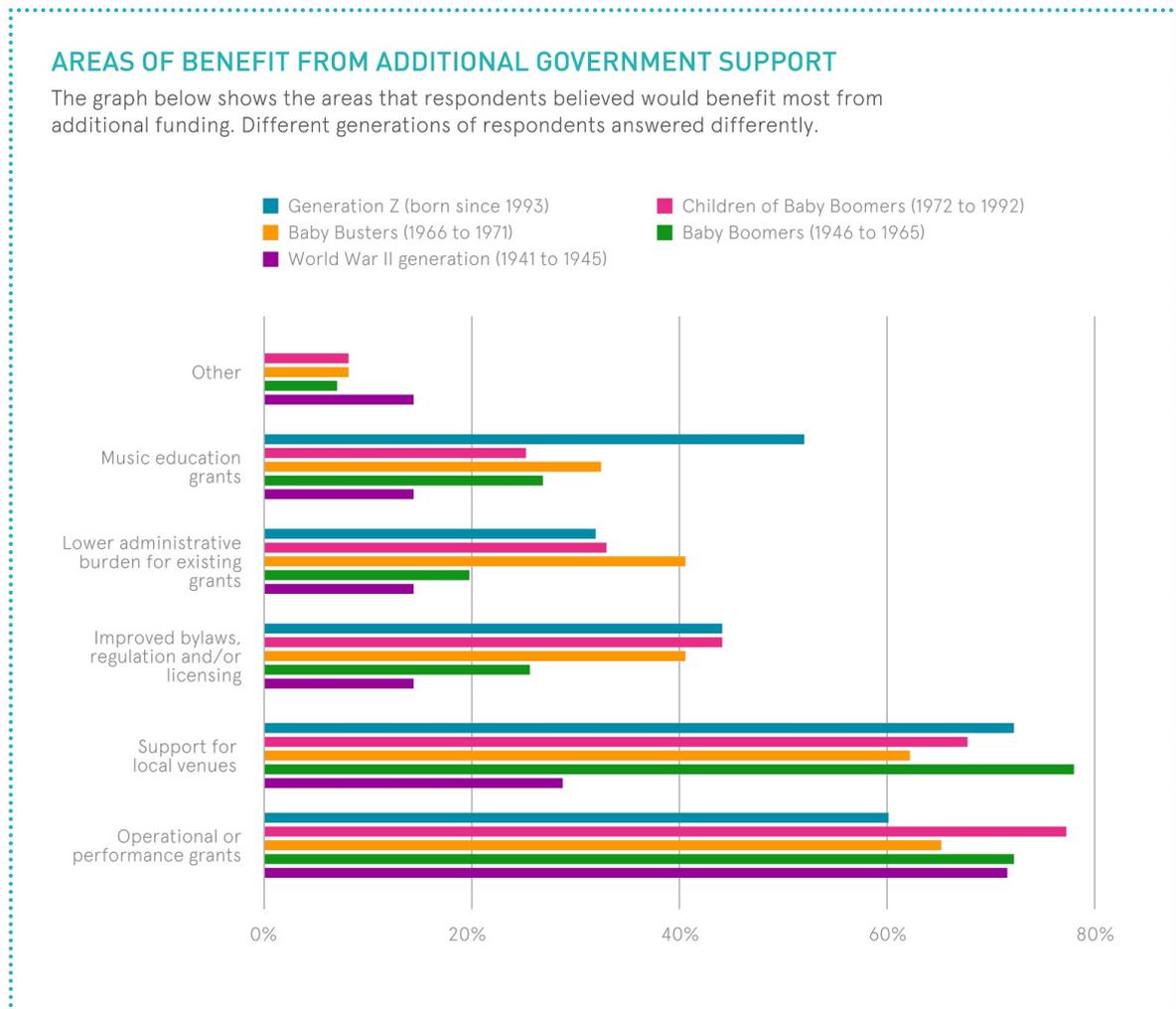
³⁷ <http://vancouver.ca/files/cov/vancouver-art-culture-grant-programs-list.pdf>

³⁸ <http://vancouver.ca/people-programs/critical-assistance-grant-for-cultural-spaces.aspx>

³⁹ British Columbia, *Vancouver Charter*, retrieved from

http://www.bclaws.ca/EPLibraries/bclaws_new/document/ID/freeside/vanch_04#section206.

Figure 17. Areas of benefit from additional government support



Another element highlighted by the interviews was entertainment districts. The Granville Entertainment District has been transformed by changes in venues’ curation and ownership, and it is no longer considered a ‘destination area’ to see live music spontaneously or discover new artists. However, the False Creek development that has been proposed and approved by the city council, could open further opportunities for a new entertainment district.

Bureaucratic processes were named as a key problem for Vancouver’s music industry when gaining licenses, permits, and even understanding procedures. The process of registering an organisation as a charity in the Canada Revenue Agency has certain requirements, including having a board of directors and conducting an annual general meeting with the organisation’s members. Then, charities must file their tax returns at the end of the year,

for which they have to hire an accountant and a lawyer⁴⁰. Such conditions are particularly onerous for small organisations, costing time and money. As well as this, City permits and regulations are created around a “permanent” concept, with complicated or non-existent regulations around temporary uses and structures which are common to the majority of events⁴¹. These limitations result in fewer companies and individuals starting in the industry, and can prevent many from successfully continuing. Liquor permits are also a cause for concern. This was mentioned by a number of interviewees, as there are extremely complex regulations when putting on an event (see Appendix 1 for more information on bylaws, regulations and permits). While policies and measures need to be in place, the restrictions around them are causing many problems for the local music industry and are preventing a supportive environment being created. There is a need for a better communication system within the City.

Many people raised concerns about sound curfews. Outdoor music must stop by 10pm and there are many limitations set by sound bylaws for both unamplified and amplified music, the times that music can be played, and the levels of music (by decibel) allowed⁴².

Vancouver released its Creative City Strategy in 2017, focusing on various aspects of the cultural offering of the city⁴³, and it is expected to be completed in 2019. This year a music strategy will be developed⁴⁴. The City’s Tourism and Cultural Departments claim to be increasingly ingrained. Roundtables revealed that the Destination Development Department should be a key stakeholder in the development of the music sector, as it is able to fund music events and other opportunities that contribute to Vancouver as a better destination overall.

As well as the aforementioned topics, challenges mentioned in the open-ended questions by industry respondents included: poor support for some structures that are key to the development of the ecosystem, such as local independent music stores; local artist development; audience engagement; promotion of live music shows; access to all-ages venues; the state of music education in Vancouver elementary schools; and touring restrictions (referring to US visas), all of which we cover in this report.

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<https://www.canada.ca/en/revenue-agency/services/charities-giving/charities/operating-a-registered-charity.html>

41 <http://vancouver.ca/doing-business/event-permits.aspx>

42 <http://former.vancouver.ca/bylaws/6555c.PDF>

43 <http://council.vancouver.ca/20171018/documents/cfsc2-StaffPresentation.pdf>

44

<http://vancouver.ca/news-calendar/city-puts-local-music-in-the-spotlight-with-the-vancouver-music-strategy.aspx>

Spaces and places

In order for the Vancouver music industry to thrive, there must be affordable homes and work-spaces, as well as good industry knowledge about processes, access and promotion. Interview responses showed clear concern about the ability of professional artists to sustain their lifestyles through their work. The rapid rise of housing and rental prices in Vancouver has increased the cost of living, making it particularly challenging to live on a salary between CAD \$30,000 and CAD \$50,000⁴⁵. The City of Vancouver has established its living wage rate for 2017 at CAD \$20.62 per hour⁴⁶, meaning that a music professional working more than 30 hours per week earning a living wage would have a music-related income of at least CAD \$30,000. According to survey results, 3 out of 4 artists (75%) earned CAD \$29,999 or less from their music-related income in the last year. Over half of artist respondents (60.1%) supplement their income by having a day job outside of the music industry and 57% of artists hold one or more additional jobs in the music industry.

As well as the inability to afford the basic lifestyle (rent, mortgage, utilities, etc), there needs to be reforms to the cost of venues, rehearsal spaces, and hubs. Currently, two thirds of artists (66.4%) are renting, owning or sharing rehearsal space, while almost 6% of respondents can't find one. Other participants quote practicing at home or their workplace (7%), either in music rooms or multipurpose facilities. Artists who do not need a rehearsal space account for 13% overall. Affordability of living and working spaces was largely quoted in our survey as a priority area that would benefit from increased government focus. Besides the specific categories, these issues were referred to in different ways in the 'Other' category. Suggestions included raising the workers' minimum wage in the city, more affordable rehearsing and jamming spaces and the protection of those currently existing, and providing direct funding for all-ages non-profit venues.

NB: Since the inception of this report a new rehearsal space has opened. The Jamnasium, a 12,000 square-foot facility has become Western Canada's largest rehearsal space⁴⁷.

Civic Theatres audience data provided by the City of Vancouver shows the venues registered an audience of over 431,500 for 381 music performances taking place between March 1, 2017 and March 30, 2018. Overall, music performances booked 26.3% of the total occupancy days at the Civic Theatres (excluding musical theatre/opera, which represented around 5.7% of events). Orchestral rehearsals booked 8.6% of the total occupancy days in the analysed period. Among all music performance events only 18% were promoted by

⁴⁵ https://news.vice.com/en_ca/article/eva3zp/can-you-afford-to-live-in-vancouver

⁴⁶ <http://vancouver.ca/doing-business/living-wage.aspx>

⁴⁷

<http://www.vancourier.com/entertainment/vancouver-is-now-home-to-western-canada-s-largest-rehearsal-space-for-bands-1.23300154>

for-profit organisations, mainly performances of popular music (87.1% - including pop rock, world and orchestra) and Broadway musical theatre performances (12.9%).

Industry interviewees said rental prices at Civic Theatres for for-profit companies were unaffordable, competing with the existing venues of a similar capacity. The City competes directly with the commercial sector in relation to the number of venues it owns and operates that have low capacity/usage rates - Civic Theatres in particular. It is the opinion of many that the City should tender all venues to the commercial sector. There also needs to be more information-sharing so that artists are aware of what is available to them. Most music industry respondents (76.6%) agree there are not enough suitable venues for emerging artists in their community, and 2% believe that there aren't any suitable venues at all. These respondents were from companies, as well as professionals and artists. From our roundtables, some artists said they were not even aware of any spaces available for musical activities provided by the City. They were also unaware of City services and resources available to them, such as rehearsal spaces.

This shows a need for greater communication between the City and the music community, so that the music community is aware of the support that is on offer to it. Not-for-profit organisation Fractured Atlas runs the BC Spacefinder website, devised to allow venues to list their spaces so organisations and individuals could find them. 133 spaces are listed on the website for Vancouver⁴⁸. However, participants' only reference to this website was negative, due to demand for more venues than are currently listed. Cultural service professionals acknowledged that there are many non-traditional spaces that could be utilised for musical purposes. Conversations revealed a clear need for more affordable spaces, as well as more awareness of what is available. Vancouver Chamber Choir and local organisations working with classical music differ from others because they have access to their own rehearsal and office space - a heritage building provided to them by the City⁴⁹.

Vancouver has many festivals across the year. District festivals, such as Sunshine Music Festival, Harmony Arts Festival and Symphony by the Sea, are believed by participants to help create bonds between students, teachers and the city. Among the biggest festivals in the city are Vancouver International Jazz Festival, Vancouver Folk Festival, and Vancouver Opera Festival⁵⁰. The city offers a range of free and paid festivals and events each year. Interviewees indisputably discussed the success of Vancouver in the creation and running of festivals, however it was felt that more could be done to harness the visibility of the city during these times, to increase the promotion of the local music scene. While outdoor events do exist, the predominant feedback was that the permits and regulations required

⁴⁸ <https://bc.spacefinder.org/spaces>

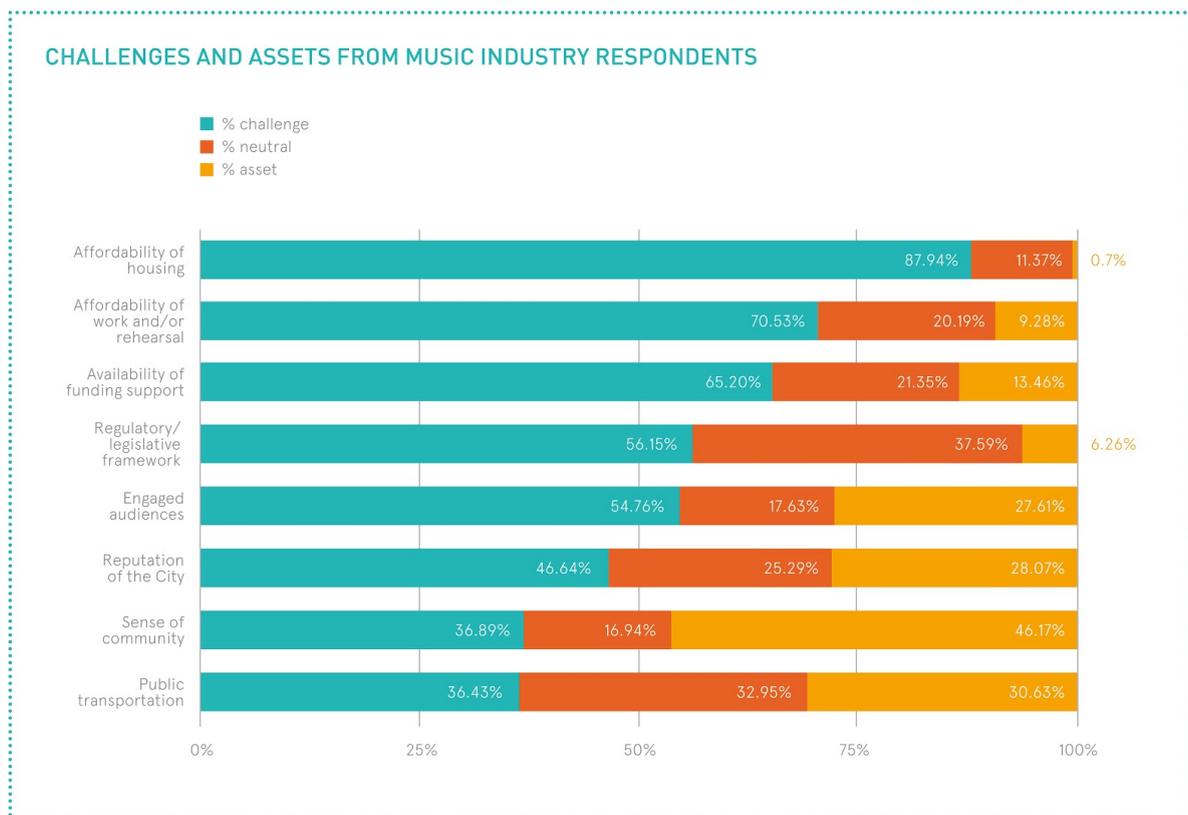
⁴⁹ <https://www.straight.com/listings/venues/473581>

⁵⁰ <https://www.tourismvancouver.com/events/festivals-and-events/>

to host these are so hard to work with that most people choose not to organise them (see Appendix 1).

Our survey results show that the regulatory/legislative framework is among the least valued asset in Vancouver’s music ecosystem. The roundtable discussions match our survey results, as it is identified as an asset by only 6.3% of music industry respondents. Those who regard the regulatory framework as a challenge have a primary role such as Music School (100% of the group rated as a challenge), Music Video/Content Creation (100%), Music Publishing (75%), Sound Engineering (71.4%), Government Departments in Music (66.7%), Artist/Musician (64.3%), Music/Artist Management (61.9%) and Music Journalist (60%).

Figure 18. Challenges and assets from music industry respondents. The chart below further displays the survey findings about perceived challenges and assets of Vancouver. The findings show that the greatest asset is believed to be the ‘Sense of Community’, and the biggest challenge is ‘Affordability of housing’.



Night-time economy

Our interviews revealed strong concern about public transport in Vancouver. The shortage of late night transport between 1am and 6am limits the appeal of the night-time offer⁵¹. There was a strong belief that this is damaging the local night-time economy. A proposed action was to develop a Cultural District within downtown Vancouver so it can act as a night-time transit hub. Also mentioned was the need for the development of safe transport options around the metro area past current operating hours. Transit was quoted as the main challenge faced when bringing existing venues and music programming closer to the public. In particular, the case of the Chan Center for the Performing Arts was analysed in-depth, as it is a 1,200 capacity, state-of-the-art venue that has particularly struggled with Vancouver's public transport infrastructure. For instance, it was suggested that a bus line could be further extended to reach the entrance of the building so that elderly visitors could access easily. All around town, the reduced taxi availability acts as a major inconvenience for night programmes. Interviewees stressed that these transit issues are particularly damaging for venues outside of Downtown Vancouver, as audiences feel they're too far out of the way to visit.

According to participants, the liability that is requested to produce live music events discourages many from producing shows, ultimately displacing small and medium-sized promoters out of the main entertainment areas. Because of financial requirements, the younger generation of local artists, DJs and promoters are creating a parallel system of illegal venues, most of which do not comply with safety and security minimums. Since the roundtable, the Vancouver Art and Leisure society has secured a new permanent warehouse location, allowing them to create regulated electronic music events, with the aim of providing a safe space for the LGBTQ community⁵². This is one example we have found, and not the sole space in the city.

The aforementioned Good Night Out programme aims to improve security for patrons and staff. In September 2017 the organisation started using a group of volunteers (called the Nightlife Street Team) to provide a weekly patrol of the Granville District⁵³. Concerns around safety due to lack of transport, binge-drinking, and violence has led to the group providing assistance to anyone in need - this involves waiting at bus stops, charging mobile phones, and basic first aid⁵⁴. The programme has registered 2 certified venues, 3 certified festivals, and 7 partners. It launched in Vancouver (having originally started in London, UK) in response to a lack of capacity for nightlife venues to appropriately target and

⁵¹ <https://www.tourismvancouver.com/plan-your-trip/getting-around/transit-system/>

⁵²

<https://www.straight.com/music/1055656/vancouver-art-and-leisure-secures-new-warehouse-location-electronic-music-events>

⁵³

<http://www.cbc.ca/news/canada/british-columbia/women-s-safety-on-the-granville-strip-what-cbc-saw-on-a-night-out-1.4283290>

⁵⁴ <http://www.cbc.ca/news/canada/british-columbia/good-night-out-1.4280504>

handle harassment and sexual assault. According to the organisation, provincially and federally there is a lack of policy or guidelines on how the night-time economy can implement sexual violence prevention into their operations. 1 in 5 sexual assaults are drug- or alcohol-related and so, by using peer-led audits, research,⁵⁵ training and bystander intervention, Good Night Out works to create a safer environment⁵⁵.

Music education

Budget cuts in 2016 led to significant changes to music classes (for kindergarten to 12-year-olds) in schools across the city⁵⁶. Although it has now been announced that some funds will go back into hiring staff, there is no mention of money being reallocated to music programmes⁵⁷. There are concerns about the type of music education that is available in elementary, secondary and post-secondary education as it rarely highlights the multi-disciplinary benefits for music students in non-musical areas (creativity, leadership and teamwork). The quality of teaching in Vancouver isn't consistent across the city, with varying levels of educational backgrounds and musical skills. However, there has been growing advocacy for this in the past 3 years, which has been instrumental in the creation of the Coalition for Music Education (CMEBC). It works to bridge the gap between government and local industry, in order to protect, promote and improve music education. The CMEBC is a non-profit society made up of parents, educators, arts organisations and supporters from across the British Columbia communities, led by conductor, Christin Reardon MacLellan - a keen advocate for quality music education in schools⁵⁸. The Ontario government announced in May 2018 that schools would receive CAD \$3million in funding for musical instruments⁵⁹.

Many interviewees raised issues of the lack of mentoring programmes in tertiary education, industry training for music students, and training on how to begin a career in the music industry. Help is needed with industry terms and jargon, training in developing a music career, and practical training for creating and producing music. There is notable demand for more knowledge of business structures, finances and taxing, as well as music production and management - not only for students, but also for professionals needing extra support. All of this could be improved with mentor programmes, training and specific modules on music courses. Programmes are available at the Nimbus School of

⁵⁵ <https://www.goodnightoutvancouver.com/what-we-do/>

⁵⁶ <http://vancouver.sun.com/opinion/opinion-restore-funding-for-music-at-elementary-schools>

⁵⁷

<https://www.vancouverobserver.com/opinion/bc-budget-includes-more-education-funding-most-it-will-go-complying-supreme-court-canada>

⁵⁸ <http://www.cmebc.org/about.html>

⁵⁹

<https://news.ontario.ca/edu/en/2018/05/ontario-boosting-support-for-music-education-in-schools.html> Accessed 25-5-18

Recording and Media in practical experience for audio and visual production, plus artist development and music industry and business⁶⁰.

There is a limited number of after-school music programmes in the city. The most far-reaching are those by the Saint James Music Academy, which aside from the musical programme, also provides transport between school and the academy⁶¹. It also runs music therapy courses, summer camps, youth mentorship programmes, and provides free classes during the day to a number of local schools. After-school programmes were mentioned as a limited resource, and participants recommended that the City encourages community centres to develop them in order to increase music participation among students.

None of the interviews provided any information about digital music education for schools. The only opportunities our research uncovered were those for higher-education students, for example the Music Technology course at the University of British Columbia⁶², and Digital Music Production at Langara College⁶³. While the focus of conversation was about music education in general, there are clearly many aspects that are neglected in school curricula.

Music artist development

In order for artists to feel supported and able to sustain a lifestyle through their work, there must be specific measures in place and opportunities available.

In recent years the live music offer in Vancouver has changed, following the rebranding or closure of struggling venues; there is now a belief that bands are being booked less frequently in favour of DJs, who cost venues less money. Success for some genres has been decreasing, although according to participants, the local electronic music sector appears to be a growing niche in the city, creating new opportunities. We asked about live music in our survey and found that artists earning CAD \$999 or less in the last 12 months from all music sources represent 22.7% of all artist respondents in Vancouver. This group played an average of 7.9 shows/gigs in Vancouver and 0.7 festivals in BC in the last 12 months. Half of them (55.5%) have not played any shows or festivals in Vancouver in the last 12 months. Those who disclosed their additional incomes mostly have a job outside the music industry

⁶⁰ <https://nimbusrecording.com/programs/>

⁶¹ <https://sjma.ca/our-programs/>

⁶² <https://music.ubc.ca/career-technology/>

⁶³

<https://langara.ca/continuing-studies/programs-and-courses/programs/digital-music-production/index.html>

(67.1% of all group respondents), while 12.2% are music entrepreneurs, and 6.1% teach music.

Our survey revealed that artists who spend more than 30 hours working on their music per week represent 29% of all Vancouver artist respondents. Among this group, 12% of them are artists/musicians without any secondary role. Artists working over 30 hours per week have an income supported largely by live performances. The majority in this group (22.5%) earned CAD \$50,000 or more in the last year from live music/touring but, for the same estimated hours of work, a 17.5% of the group had earned CAD \$999 or less from performances. The average number of local shows played by these artists is 56.4 shows/gigs and 1.9 festivals in BC in the last year.

There are many opportunities in Vancouver within the recorded music spectrum. With flourishing film and gaming industries, there are chances for partnerships to be formed. Although new partnerships would help with artist development, there is concern about the future of many recording studios. In general, local studios are suffering from financial trouble, except for those that own their studio space, and there is only one studio in Vancouver capable of recording large orchestras: the CBC Studio 1. Our analysis of Creative BC grants shows that the Sound Recording Program awarded the lowest average amount per Vancouver-based recipient across all BC Music Fund programmes in 2017-18 - an average of CAD \$7,428.36. Aside from small grant awards, much of the problem could be down to an administrative burden for record labels in BC that is not common to all Canadian provinces. Interviewees noted that BC's second sale tax (PST) affects records sold in BC by charging a 7% return, and its credits cannot be claimed in the same way as federal sales tax. In 2013 the 2009 bill for the Harmonised Sales Tax was revoked, which meant that taxes rose and the PST and federal sales taxes were no longer combined⁶⁴. Not having a harmonised sales tax is a problem for smaller labels in particular because they cannot afford external accountants in the same way that larger businesses can.

Survey respondents who are music industry professionals/freelancers and artists mostly identify as male (63.5%), with a lower representation of identified female (32.5%), two-spirited (0.8%), non-binary (0.8%), and other genders (0.5%). Statistics differ when isolating music businesses' responses, as almost three out of four Vancouver music company owners (72.5%) identifies as one or more minority groups, with one out of three business owners (35.3%) identifying as more than one minority group.

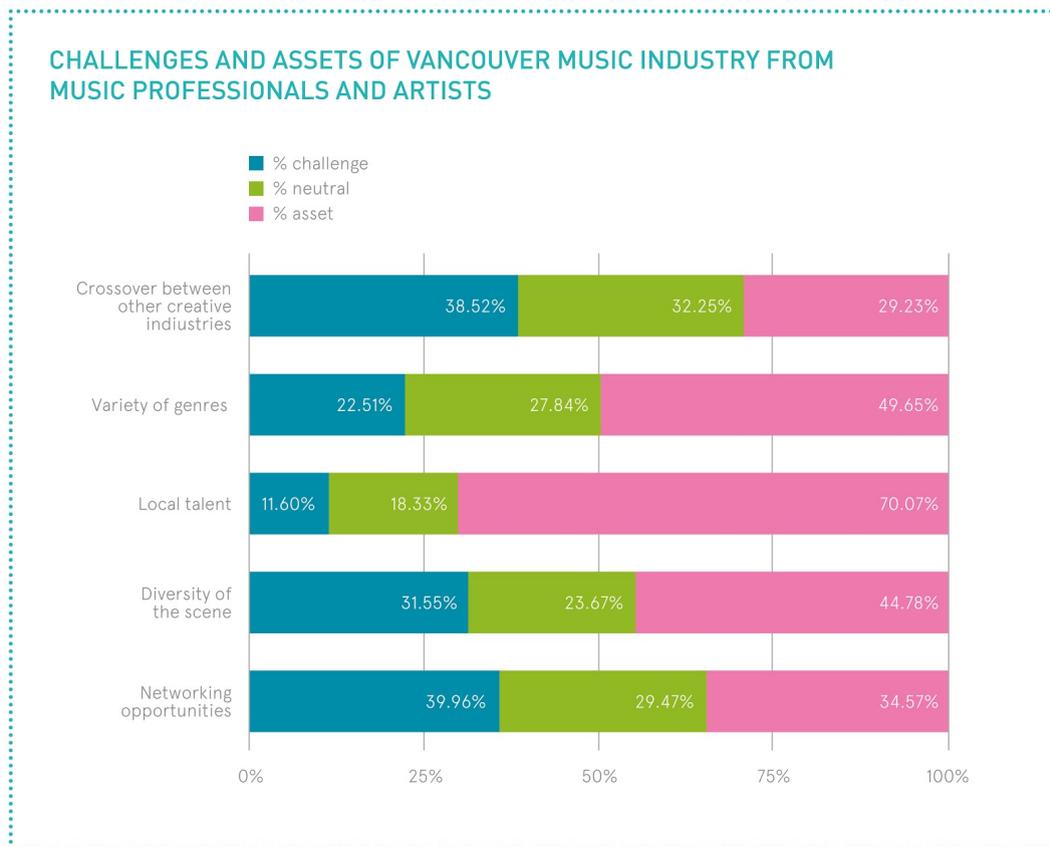
Genre diversity in Vancouver's music ecosystem is noticeable when looking into the secondary genres of work, with an average of 2.7 secondary genres per artist and 5.3 secondary genres per company/professional. 34 music industry respondents work in 9 or more genres. Venues and Music Journalists are the most prolific roles in terms of genres,

⁶⁴

<http://www.cbc.ca/news/canada/british-columbia/b-c-returns-to-old-sales-tax-after-hst-rejection-1.1357314>

followed by Artists/Musicians/Performers and Music Festivals. Some industry roles are tightly linked to certain music genres. For instance, two out of three Booking Agents work in Rock and half of the Music Educators/Instructors work in Classical. Vancouver's Record Labels are among the most homogeneous categories, with over half (58.3%) working primarily in Indie/Alternative, followed by Music Promoters who primarily work in Dance/Electronic (56.25%). The overall statistics for music professionals and artists indicate that diversity of the scene is considered an asset by 44.8% of respondents and a challenge by 31.5%. When isolating the sample of non-male respondents, responses are also somewhat homogeneous: 39.1% believe diversity is one of its best assets, while 37% believe it is a challenge. Filtering this result to non-male, non-European ethnicity respondents gives different results: 50% believe the diversity of the scene is one of its best assets, while 34% consider it a challenge.

Figure 19. Challenges and assets of Vancouver music industry from music professionals and artists. The graph below shows in more detail further challenges and assets of the music industry by category: Crossover between other creative industries; Variety of genres; Local talent; Diversity of the scene; and Networking opportunities.



Our interviews revealed a number of challenges around promotion and marketing outside the city for local artists and bands, via touring. Although Canadians can visit the US without a visa for tourist purposes, if artists want to include a US tour, they face high fees and restrictions, including having a recognised petitioner, which typically means paying for membership with a musicians’ union⁶⁵. Many disabled musicians struggle to fund tours as their grants don’t cover the extra costs for this. There are also concerns that Vancouver venues don’t have accessible stages, backstage areas or bathrooms, and as a high-cost issue, this isn’t being prioritised. As a result, the scope of diversity is being limited. Having said that, there are also development limitations to touring, as many artists must tour outside the region to make a living, in part due to the isolated geography of Vancouver and BC. This pushes artists to move out of Vancouver and limits the number of visitors to the area to see these bands and artists live. However, Vancouver is still a highly relevant city for touring bands from Canada, the US and abroad. International performers

⁶⁵ <https://noisy.vice.com/da/article/r7pe54/canadian-border-american-union-dues>

scheduled to play in Vancouver this year include The Hot Sardines, Kendrick Lamar, P!nk, The Upper Strata, and Sam Smith⁶⁶. Canadian bands and artists scheduled to play include Emma Cook, Casper Skulls, and Rosedale⁶⁷.

In response to participant concerns about grants and touring, our research included an analysis of Music BC's travel grant recipients in Vancouver for 2017-2018, using information provided by Music BC about grants requested, grants awarded and amounts awarded. We selected each individual recipient and cross-verified that with the recipient company based in Vancouver. Results show that as of April 2018, a total of 248 Vancouver artists and organisations applied for Music BC's travel grants in 2017-2018. A total of 120 Vancouver projects were awarded grants, with an average award of CAD \$2,718.27 per case. Vancouver applications represent 60.6% of all approved grants in British Columbia. The call with the highest percentage of approved grants for Vancouver artists and businesses was February 2, with 98% of approved funding for Vancouver applicants. This call also has the highest percentage of Vancouver-awarded companies, at 73.5%. The programme with the highest average amount awarded to Vancouver artists is Road-to Series, with an average of CAD \$8,566.70 awarded per project. This is also the programme with the lowest number of Vancouver awards, at a total of 6 grants for 3 beneficiaries. The lowest average amount awarded per case is in the Business Travel - Domestic grant, with an average of CAD \$1,043.75 awarded per project (16 Vancouver awards total). The programme with highest number of awards is Business travel - International with 41 approved grants and an average amount awarded of CAD \$1,467.80.

In terms of labour conditions, local artists are commonly hired by signing standard contracts through agents. Although there are union regulations for performance rates, interviewees believe that they are not enforced. Many artists apparently agree to rates below union standards as it is perceived that they wouldn't be booked otherwise. Labour conditions were also a challenge identified by artists to address the higher cost of life in the city. Artists appear to be disconnected from the musicians' unions, with some people arguing that the union is largely disconnected from the sector's needs and is more heavily focused on classical and contemporary music support. Standard union rates for classical musicians, for instance, are below market standards, while most artists are unaware of their insurance options and how to opt in for public healthcare. In general, artists do not perceive unions as a useful or appealing organisation to improve their working conditions or advocate for improvements in the sector on a local level. The largest union in Vancouver is the Vancouver Musicians' Association, with around 100,000 members⁶⁸. Benefits include enforcing⁶⁹ contracts, helping musicians to work in the US, legal advice, and equipment discounts⁶⁹.

⁶⁶ <https://www.vividseats.com/region/vancouver/concert-tickets.html>

⁶⁷ https://www.songkick.com/metro_areas/27398-canada-vancouver?page=6

⁶⁸ <https://www.vma145.ca/faqs>

⁶⁹ <https://www.vma145.ca/pages/membership>

The Society of Composers, Authors and Music Publishers of Canada (SOCAN) represents the Canadian performing rights of millions of Canadian and international music creators and publishers⁷⁰. Roundtables revealed discontent that some local venues notably refuse to comply with SOCAN regulations and fees, which ultimately harms the income and sustainability of songwriters, composers and music publishers. SOCAN made nearly CAD \$1million in revenue from drinking establishments in Vancouver in 2017, and just CAD \$2,000 from entertainers and entertainment groups.

94.6% of all Metro Vancouver music writers are based in the City of Vancouver. In 2017, SOCAN had 5,105 music writer members registered in Vancouver and 559 publishers, with 2,180 active members. The average earnings per paid member was CAD \$3,334.

The city area with most members was East Mount Pleasant, with 525 members (including publishers and writers), followed by North Grandview-Woodlands (499) and South Grandview-Woodlands/NE Kensington (406); the areas with the fewest members are Pacific Centre (1) and Bentall Centre (8). If we look at the breakdown between publishers and writers, East Mount Pleasant still has the most writers (488), but NE Downtown/Harbour Centre/Gastown/Yaletown has most publishers (71). South Renfrew-Collingwood and Pacific Centre don't have any publishers.

In terms of earnings, Vancouver's publishers and writers earned a total of CAD \$7,269,035.54 in 2017. Area-wise, NE Downtown/Harbour Centre/Gastown/Yaletown lead the list, with a total of CAD \$3,265,714.41 and South Shaughnessy/NW Oakridge/NE Kerrisdale/SE Arbutus Ridge earned the least, with CAD \$3,114.19. Again, this varies when we look at the areas with most and least earnings per publisher (NW Shaughnessy/East Kitsilano/Quilchena, with CAD \$529,972.14 vs SE Kensington/Victoria-Fraserview with only CAD \$145.49) and per writer (NE Downtown/Harbour Centre/Gastown/Yaletown in this case too with CAD \$2,918,463.67, and Pacific Centre, as expected, with \$1,541.33). Foreign earnings lead the source of income with \$4,903,827.92 in total, followed by cable (CAD \$770,778.87).

Music industry professional development

Vancouver's position in British Columbia gives inhabitants access to over 160 recording studios, over 285 music companies, and more than 200 festivals each year⁷¹. 15 rehearsal spaces exist within the city of Vancouver, 8 of which are in recording studios. The range of participants for our roundtables and interviews provides a useful overview of the types of

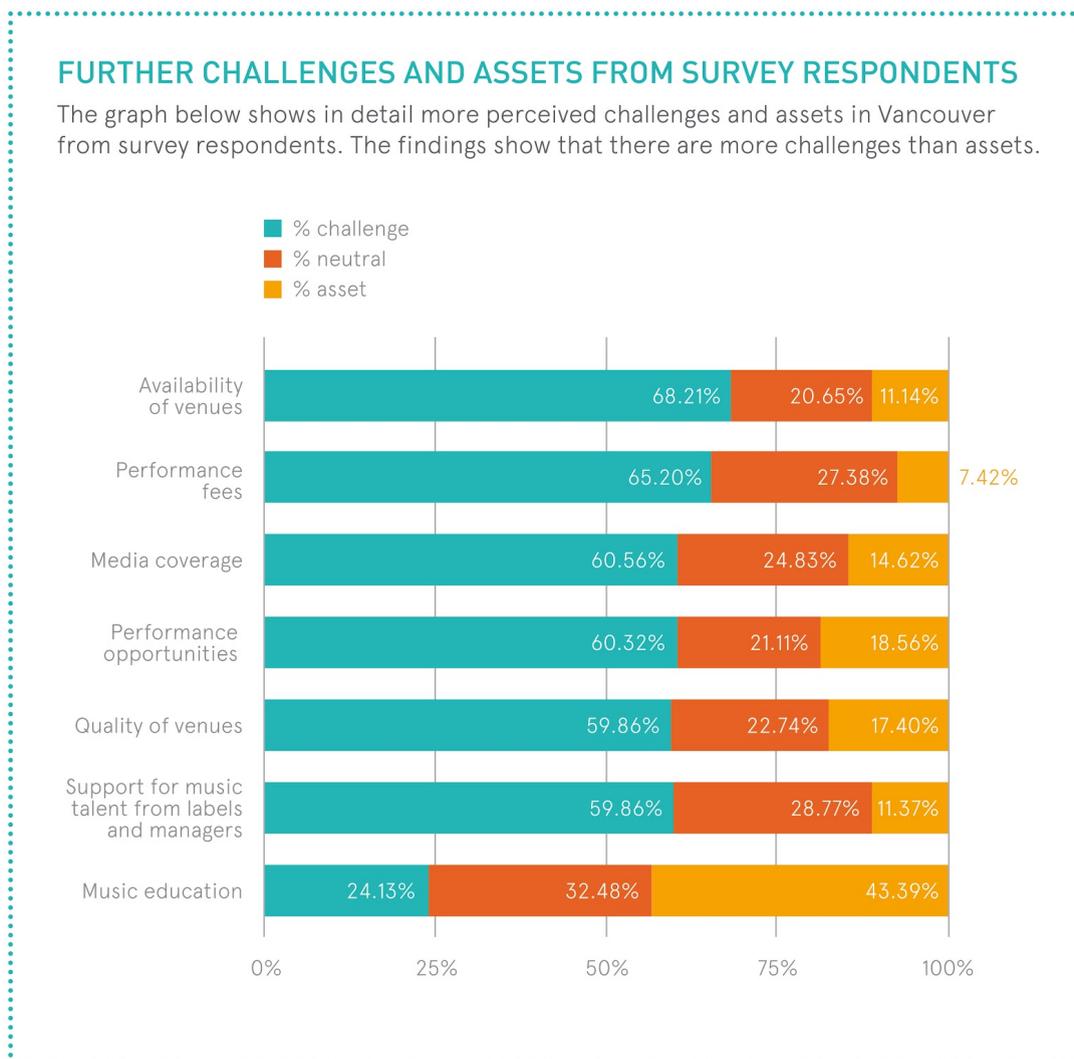
⁷⁰ <http://www.socan.ca/about>

⁷¹ <http://dailyhive.com/vancouver/music-canada-vancouver-industry-government-support>

music professionals that are working within the city, from editors to promoters, videographers to PR experts.

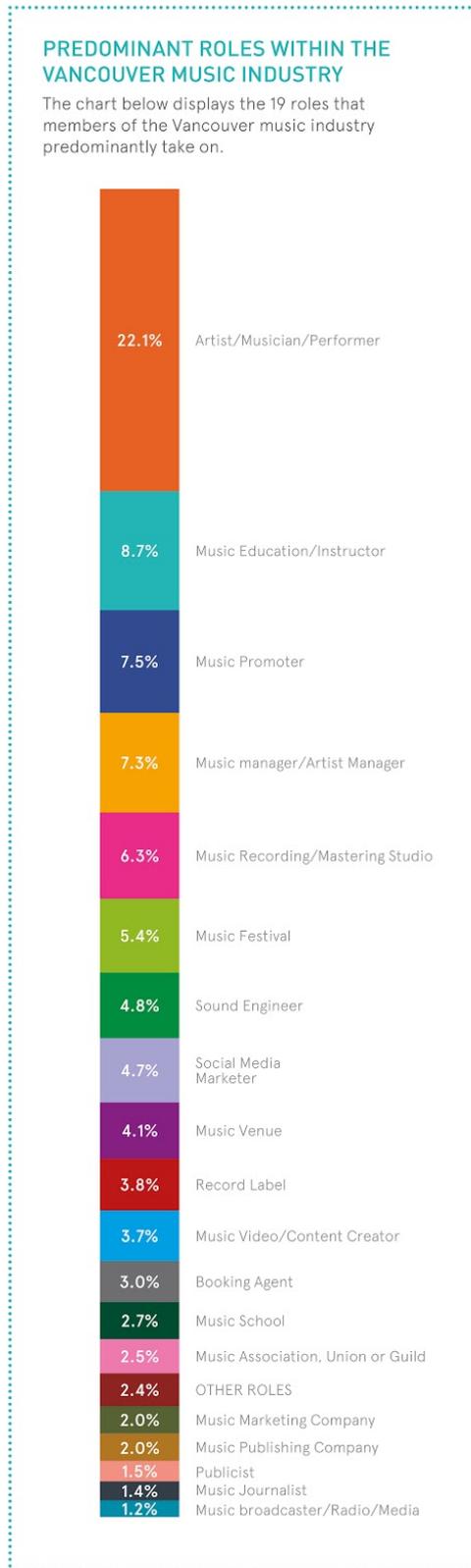
Our research included examining the health of the local music industry. When asked to rate different aspects of the local involvement in the music industry, music industry respondents were in overwhelming agreement about the challenging affordability of housing and of the work/rehearsal spaces in the city. Music industry respondents graded the local talent, the variety of genres, the diversity of the scene and the sense of community as Vancouver’s best music industry assets.

Figure 20. Further challenges and assets from survey respondents.



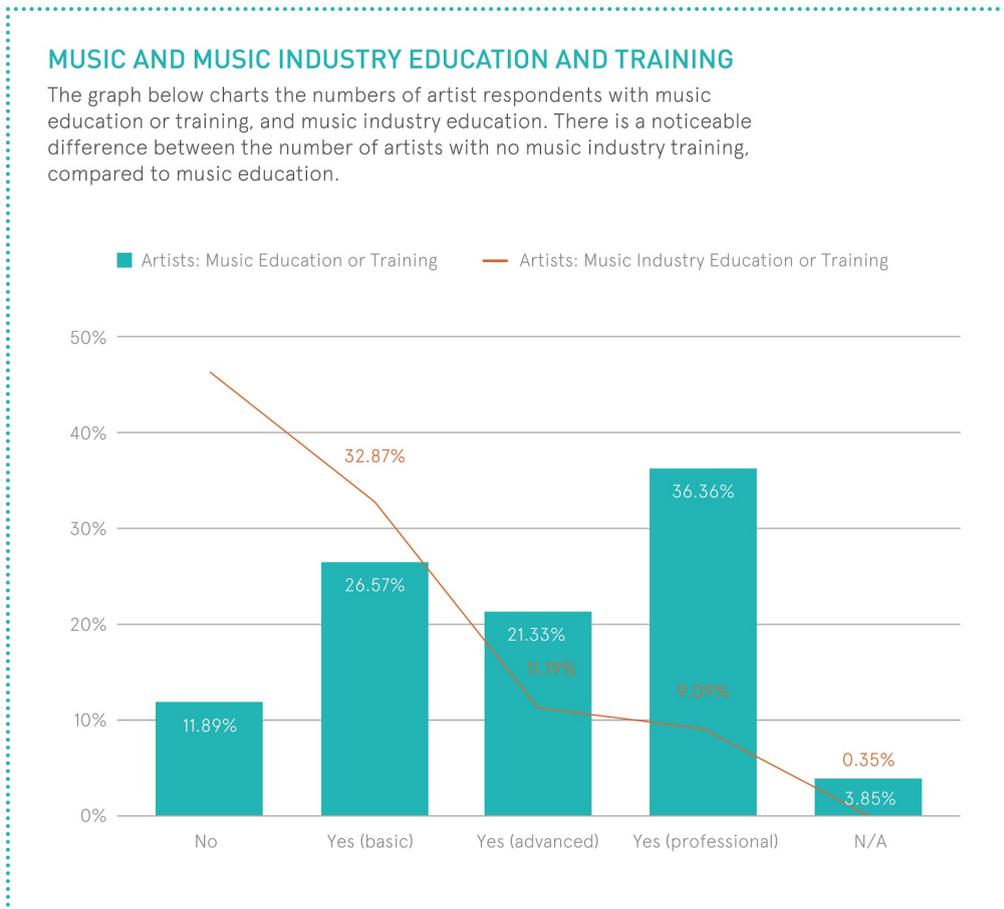
Most music industry respondents (82.6%) have more than 1 primary role in the music ecosystem, and an average of 2.8 secondary roles. A total of 1,419 primary and secondary roles are carried out by music industry respondents, with the following predominant roles:

Figure 21. Predominant roles within the Vancouver music industry.



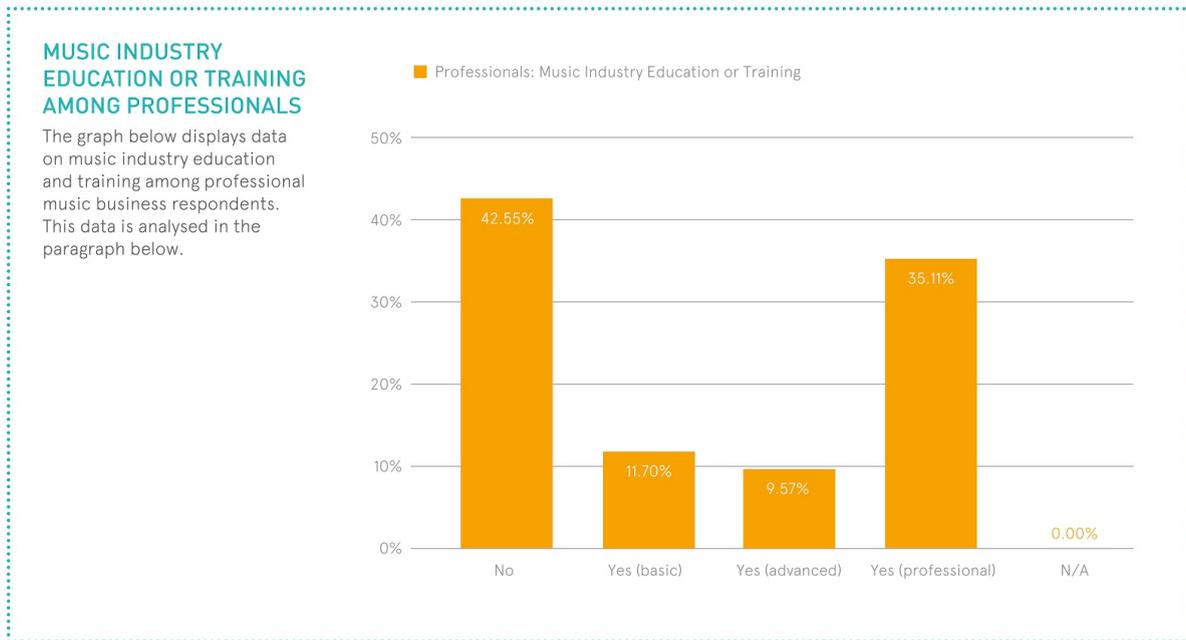
Although there are clearly many skills within the Vancouver music industry, many people opined that the professional state of musicians in Vancouver is precarious in terms of business education. Although participants show a clear understanding of how important business education is, they explained that most managers and artists in the local grassroots level had not learned the basic skills. While our survey found that 57.7% of Vancouver artists have mostly received music education or training to an advanced or professional level, only 23% of respondents among this group of high-level musically-trained artists have also completed advanced or professional music industry education. Results show that 11.9% of artists claim to have not taken any music education or training, despite considering the availability of music education in Vancouver to be 'good'. However, some of these artists without formal music training have completed music industry education to an advanced or professional degree, either by self-training, workshops or through an institution.

Figure 22. Music and music industry education and training



Overall, music industry professionals are split when rating the availability of music industry education in Vancouver: 43% of professionals rate it as ‘good’ or ‘very good’, while 36.6% believe it is ‘poor’ or ‘very poor’. Almost half of the music professionals/freelancers (42.5%) do not have any music industry training, a situation reflected among artists/musicians/performers (46.5%).

Figure 23. Music industry education or training among professionals



Our findings show that only one third (35.1%) of professionals have completed music industry education to a professional level. The primary roles of music recording/mastering studio and music educator/instructor rank among the highest trained, with a ratio of 60% professional-level educated respondents in their respective sectors. Lack of music industry training particularly affects the professionals whose primary role is booking agent, government department (in music) and professionals in music marketing, since 2 out of 3 respondents in these categories do not have any music industry education.

Career development is a key factor in retaining musical talent in Vancouver. A large part of this is ensuring a supportive environment is available, with access to facilities, knowledge and sustainable living. This is particularly important when it comes to competing with other major cities. It was noted that many of the performers associated with Vancouver do not actually live in the city, but frequently travel there to perform and work. Opportunities for career development should be available to teenagers, but according to our Education roundtable, career development pathways in education are not currently linked to music industry opportunities at the local level. As well as this, it was a general belief that there is a shortage of skilled independent professionals and companies focused on incubating and developing artists' careers. That being said, our roundtables revealed a number of artists who are willing to increase communication between the music community and the City to further connect youth with the local music scene in order

to raise awareness of career opportunities available, for instance by coordinating mentorships.

As a tech hub⁷², the Vancouver music industry has the potential to combine music and technology. Interviewees stated that the strong links Vancouver has to the gaming sector present a potential market opportunity for tying in music and further developing the local music sync and publishing sectors. There are notably some music tech companies in Vancouver such as Ritual, The District, Monstercat, Yogitunes and Skio. Outside of these examples, the music and tech sectors are rather disconnected. Because much of the local music scene is electronic or digital-based, the interaction between sectors presents opportunities to embrace innovation and develop new products and services.

Some areas of the industry have an international reach. The local recorded music industry believes its size and ability to incubate talent are the biggest appeal of the music industry in Vancouver. The underground music scene in Vancouver has been positively noted for the number of creators, although developing its audience is a challenge for its sustainability. Access to media and networking are important challenges that local artists face. The local scene perceives that artist collectives get more attention from outside of the city than in Vancouver. 261 survey respondents listed media as being one of their greatest challenges. The local music recording sector is well-connected internationally, but participants remarked that most of the networking is done on an individual basis. It is also the belief of many that artists and businesses achieving international success seem to have done so by working with external professionals, and not using the local talent available to them.

There was a general sense of aspiration when it comes to possible collaborations. Many people shared the opinion that cross-collaboration with other sectors, as well as other areas of the industry, would benefit the music sector. According to participants, collaboration happens on the artistic level, but they believe that further collaboration is required to manage this talent between smaller and mid-sized organisations. Some participants also shared the belief that the local music community has been affected by demographic changes, and that the large communities of different cultural groups do not interact or work collaboratively. It was mentioned that increased communication and collaboration within the music sector and with the City would also be key to economic development.

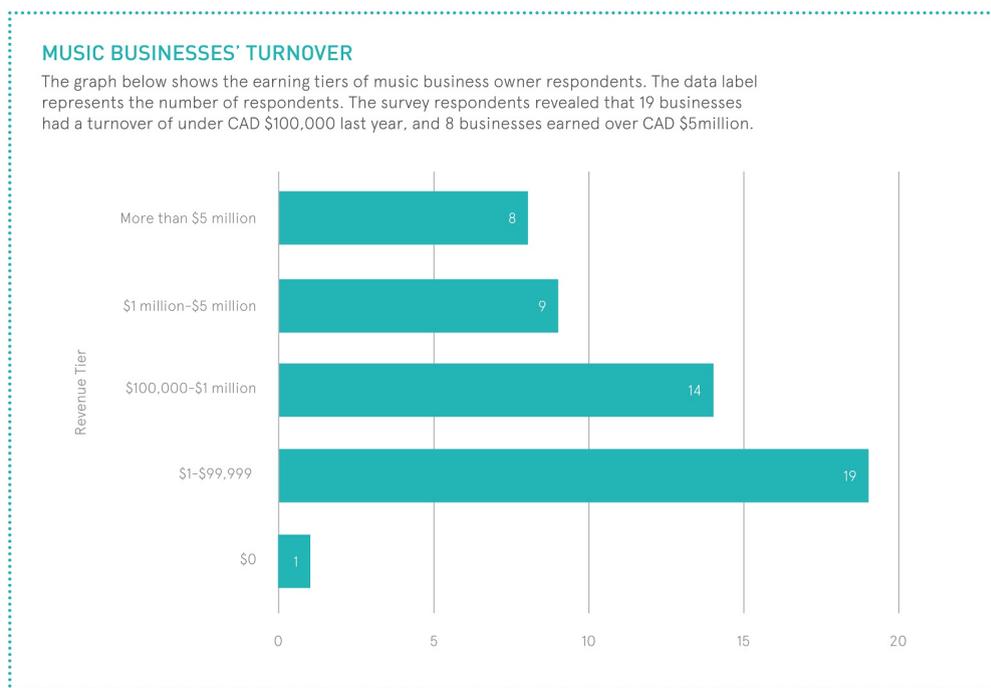
Networking on an international level was discussed above, but the topic of local networks and workshops is also important. The accountancy firm, DCML, has conducted workshops in collaboration with Music BC in the past, but it was noted that these were generic groups with different individual needs. The interviewees believed these sessions could have been better organised by creating focus groups according to participants' needs and problems, or offering one-to-one appointments. Survey respondents stated that networking

⁷² Impact Report 2016/17, *Creative BC*, p.14.

opportunities do not appear to be a major challenge in the ecosystem, viewed as a challenge by 36%, and as an asset by 34.6% of music industry respondents. Responses from non-male participants are neutral in the majority: 87% do not consider networking opportunities to be a challenge nor an asset in the Vancouver ecosystem, although 9.9% consider it as a challenge.

The music industry in Vancouver is of great value to the local economy. Two out of three Vancouver music company respondents have a turnover of CAD \$1million or less (66.7%), totalling 34 businesses. The survey revealed that the highest-grossing primary role for business respondents is Music Venue, because 2 venue business respondents have a turnover of CAD \$5million or more per year, and the rest of venue business respondents have a turnover of CAD \$1million or more per year.

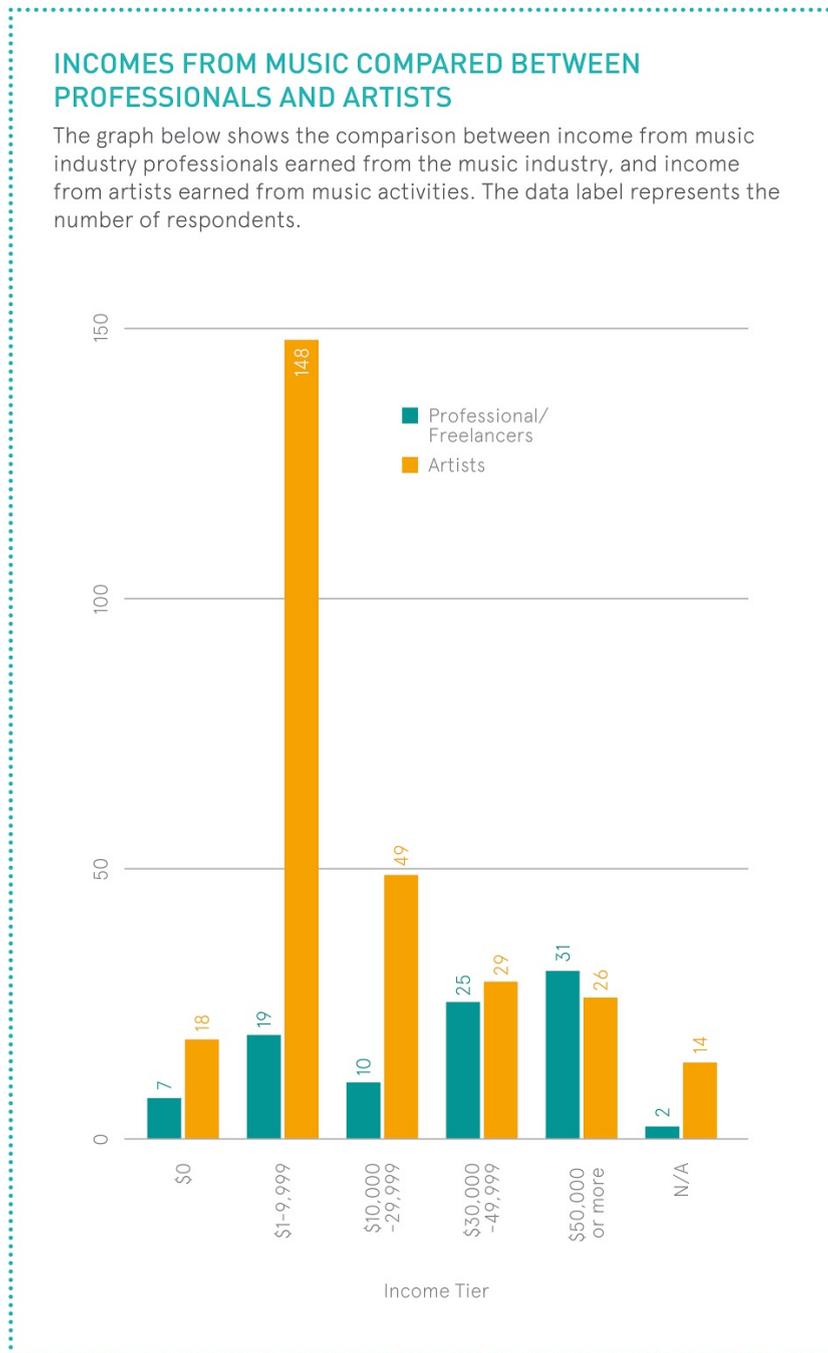
Figure 24. Music businesses' turnover



Last year, 9 non-profits and registered charities (75%) had a revenue of CAD \$1million or less. The income for 10 of these not-for profit organisations (83.3%) comes wholly from music activities, and nine (75%) have music-related revenue that comes mostly from Canadian artists. Overall, two-thirds of all business owner respondents (66.7%) rely on volunteer work for one or more areas of work. In total, 34 music professionals/freelancers earn CAD \$50,000 or more from music activities. The most lucrative professional respondents have the primary role of booking agent - all the professional respondents (count 2) reported earning more than CAD \$50,000, followed by Music Marketing (2 of all 3

respondents reported earning more than \$50,000) and Music Educator/Instructor (5 of all 10 respondents earn more than \$50,000). 33 music professionals earned CAD \$1-29,999 or less in the last year (30.8%). The least lucrative professional respondents have the primary role of Music Video/Content Creator (1 count) and Music School (1 count) since all respondents earned CAD \$29,999 or less in the last year.

Figure 25. Incomes from music compared between professionals and artists

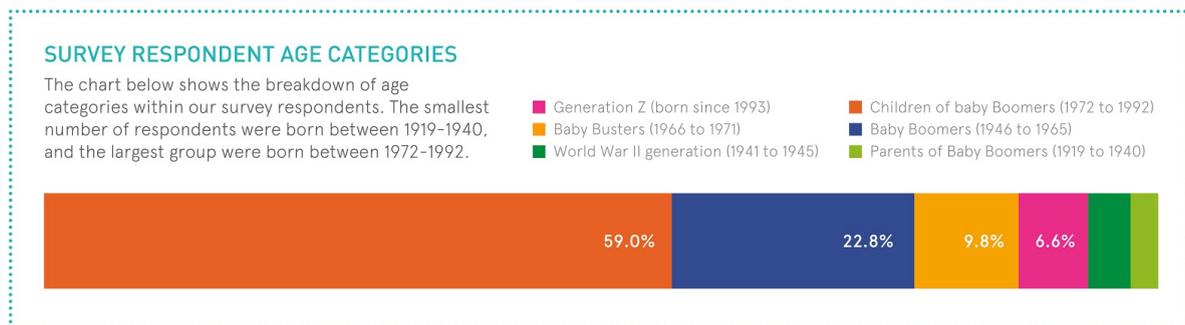


Over half (52.9%) of Vancouver’s music business owner respondents identify as female and 29.4% as LGBTQ. Business owners from a visible minority make up 33.3% of the sector and

Aboriginal owners account for 9.8% of the total. People with disabilities represent 9.8% of business owners overall.

The generational switch in Vancouver is timid, as only 6.6% of music industry respondents are 25 years or younger, while 24.7% are aged 53 or older. The average age of music industry respondents is 42-43, with an overall larger representation of the age group of “Children of Baby Boomers”⁷³ born 1972 to 1992 (59%).

Figure 26. Survey respondent age categories



British Columbia has recently approved an additional CAD \$7.5million for funding to BC’s music industry. This funding will be administered by Creative BC through the new Amplify BC fund, going towards career development for BC artists, support for live music events in BC, support for BC’s music companies, and the development of the provincial music industry⁷⁴. The former BC Music Fund provided the most funding for artists and industry professionals in Vancouver, with over CAD \$22million available^{75 76}. Many interviewees noted that more grants and subsidies should be provided towards license and permit costs. In particular, the LGBTQ community identified that the city has potential for further developing the local scene by easing permits, and increasing access to funding for minority groups and certain demographics in the city.

NB: A full list of available grants in Vancouver can be found in Appendix 2

⁷³ As defined by Statistics Canada’s Age Groups. Retrieved from http://www12.statcan.gc.ca/census-recensement/2011/as-sa/98-311-x/98-311-x2011003_2-eng.cfm

⁷⁴ <https://www.creativebc.com/programs/amplify-bc>

⁷⁵ <https://www.creativebc.com/programs/bc-music-fund>

⁷⁶ Feedback from Creative BC on this report clarified CAD \$15 million were available through the former BC Music fund, and additional grants were given out as funds were underspent. This means the recipient lists analysed at the time of this report do not work to the total \$ amount distributed.

Our analysis of the recipients of Creative BC’s BC Music Fund grants for 2017-18 revealed that the grant programme with the largest percentage of Vancouver-based recipients among all beneficiaries is the Research programme, with 100% of awardees located in Vancouver⁷⁷. We also found that 168 Vancouver-based music initiatives were awarded grants from BC Music Fund programmes in 2017-2018 as of March 26, 2018. The BC Music Fund programme with the largest number of Vancouver-based grantees is Careers of BC Artists, with 64 projects awarded (out of 107 BC projects awarded). Live music recipients benefited the most with CAD \$1,337,550.77 distributed across 30 Vancouver-awarded projects by the Live Music Program (out of CAD \$2,602,007.65 awarded to BC projects). The programme with the largest average amount awarded per Vancouver-based grantee is the Signature Artist Program, with an average of CAD \$83,852.67.

The allocated BC Music Fund Sound Recording Program budget (CAD \$3million)⁷⁸ was originally double the budget of the Careers of BC Artists Program (CAD \$1.5million). The Sound Recording Program supports the development of the sound recording sector in BC by providing record labels, artist-entrepreneurs or other music companies to cover 50% of sound recording expenses in BC. 6.7%⁷⁹ of the Sound Recording budget (CAD \$200,565.61) has provided grants to Vancouver-based projects, while city ventures were awarded 56.7% of the Careers of BC Artists budget (CAD \$849,998.75). Direct artist funding through both programmes have awarded CAD \$1,050,5648 to 91 Vancouver-based projects (out of 144 BC awarded projects). Due to these programmes both awarding projects in distinctive music genres, they have been analysed and referred to in this section as “Artist music projects”. Genres of recipients have been manually classified into the following labels according to their own self-identification in their online profiles: Alternative, Blues, Children’s music, Classical, Country, Electronic, Experimental, Folk, Hip Hop, Jazz, Pop, R&B, Rap, Rock, Singer-songwriter, Soul, World.

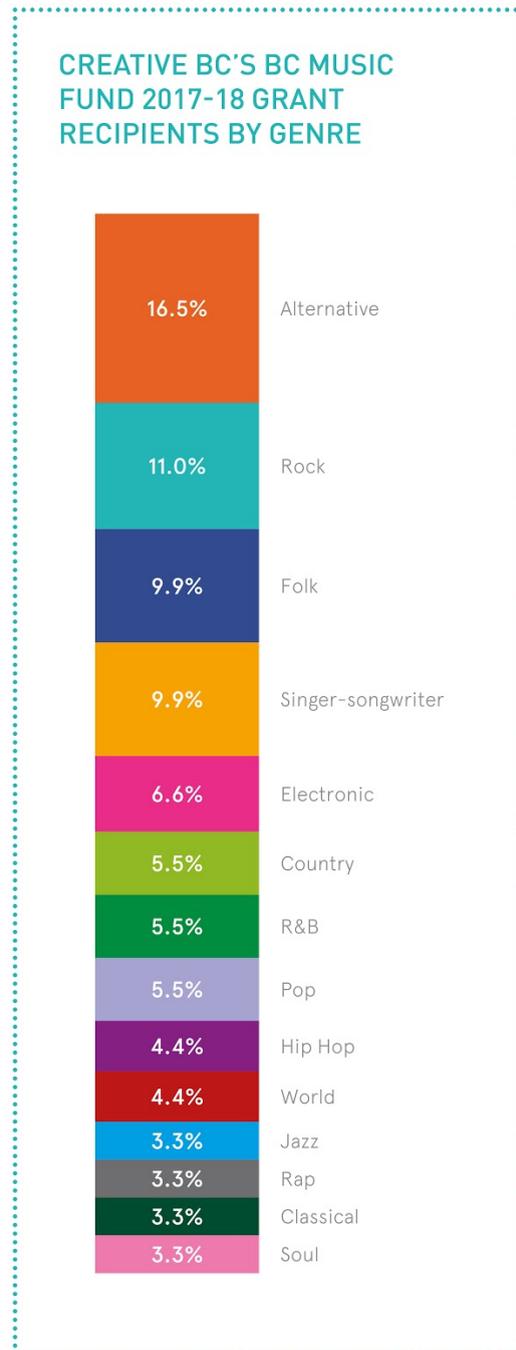
The highest representation of a labelled genre among Artist music projects is Alternative, representing 16.5% in the category, followed by Rock with a representation of 11%. The lowest representation of a labelled genre among Artist music projects is Experimental with a 1.1% representation.

⁷⁷ <https://www.creativebc.com/programs/bc-music-fund#bcmf-recipients>

⁷⁸ Feedback provided by Creative BC stated this program had increased its budget after our calculations had been made - CAD \$3.5 million were allocated (as of June 22, 2018).

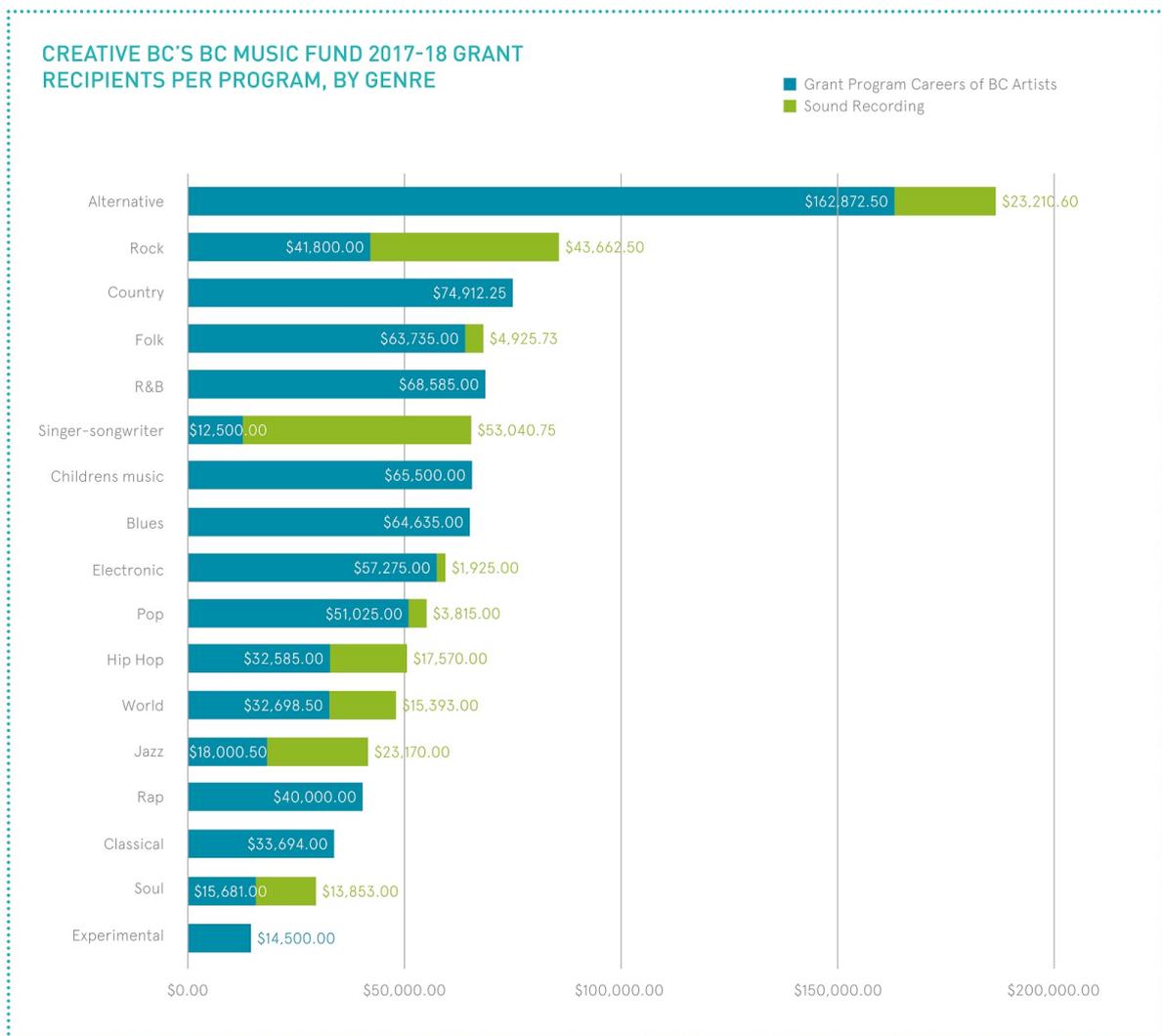
⁷⁹ Additional feedback provided by Creative BC considers recipients from both 16-17 and 17-18 funding rounds to show that 46% of ‘Sound Recording’ awards were allocated to Vancouver-based companies.

Figure 27. Creative BC’s BC Music Fund 2017-18 grant recipients by genre. Our data analysis of recipients of the Music BC Fund 2017-18 has allowed us to create the below chart. This shows, in detail, the genres awarded funding by percentage. Soul, Classical, Rap, Jazz, Blues and Children’s music received the smallest number of grants, while Alternative received the largest.



The label awarded the most funds is Alternative, with CAD \$186,083.13, followed by Rock and Country. Genre labels Rock, Singer-songwriter, and Jazz benefit from higher amounts in the Sound Recording Programme than in the Careers of BC Artists Program.

Figure 28. Creative BC’s BC Music Fund 2017-18 grant recipients per programme, by genre. In addition to the above chart, the graph below also depicts the recipients of grants by amount awarded in each category.



The highest average award per project, per genre is CAD \$21,833.33 for Children’s Music, closely followed by CAD \$21,545 for Blues. The lowest average award per project, per genre is CAD \$7,282.31 in the label Singer-songwriter, followed by CAD \$7,282.97 in the

label Folk. Out of the 168 Vancouver-based awarded projects, 77 projects were awarded in the programmes Live Music, Industry Initiatives, Research, Signature Artist, Music Company Development and Innovation, and fall across a number of categories.

The project descriptions provided in the public results available in Creative BC's website have been coded for analysis into the following categories containing more than 1 project: Marketing Expansion, Research, Staff Expansion, New Project, Marketing, Education, Services Expansion, Facilities Expansion, Concert Series, Staff, Tour Pre-Production, Software Development, Venue Upgrades, Festival. 22.1% of all labelled projects would not fall into another category due to its specification and were labelled as 'Other'.

The highest amount awarded to Vancouver-based companies in a labelled category was in Festival in the Live Music programme, with CAD \$516,275 allocated. This is also the category with the highest number of Vancouver-based projects awarded (13 recipients). The lowest amount awarded to Vancouver-based companies in a labelled category was CAD \$11,000 for Coast Jazz. The highest amount awarded to Vancouver-based companies per project, per label, was for Tour Pre-production through the Signature Artist programme, with an average of CAD \$100,000 awarded per project. The lowest amount awarded to Vancouver-based companies per project, per label was in Marketing Expansion, with an average of CAD \$17,370.50 awarded per project.

In general, the overall amount of music funding available through Creative BC and Music BC appears to be lower than the available funding at other Canadian music bodies. Creative BC's new music programme Amplify BC will be allocated CAD \$7.5million in government funding, while the Ontario Music Fund provides CAD \$15million annually to Ontario's music industry⁸⁰ and the cultural budget of Québec will see a 11% increase to CAD \$778.3million in 2018-2019⁸¹, although it has not been specified the amount allocated to music programmes.

Audience engagement

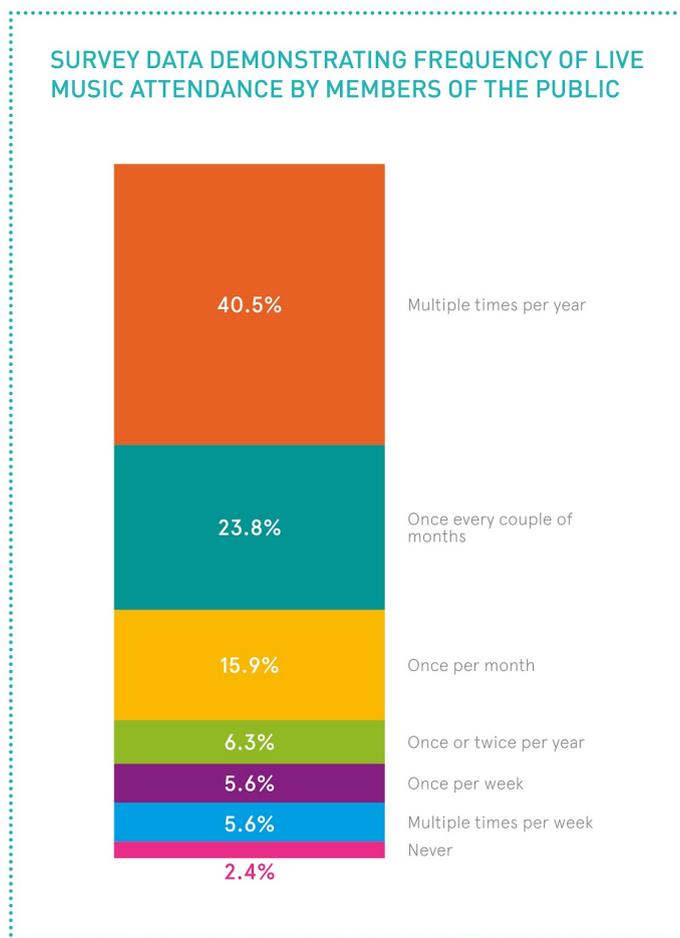
A total of 126 respondents participated in the survey as 'Members of the public'. Audience respondents enjoy the live music offering in Vancouver: only one third of respondents (33.3%) said they attend concerts 'Once every couple of months' or less frequently.

⁸⁰ Although these were awarded to Live Nation, a US-registered company, Live Nation is an active employer in the Vancouver music sector.

[http://www.omdc.on.ca/Assets/Industry+Initiatives/English/OMF/Music+Industry+Development/MI D+2017-18/OMF+Music+Industry+Development+Guidelines+\(2017-18\).pdf](http://www.omdc.on.ca/Assets/Industry+Initiatives/English/OMF/Music+Industry+Development/MI D+2017-18/OMF+Music+Industry+Development+Guidelines+(2017-18).pdf)

⁸¹ http://www.budget.finances.gouv.qc.ca/budget/2018-2019/fr/documents/Culture_1819.pdf

Figure 29. Survey data demonstrating frequency of live music attendance by members of the public. The chart below depicts the breakdown of live music attendance by survey respondents from the category ‘members of the public’. The lowest result was ‘Never’ at 2.4%, with the highest being 40.5% of recipients attending ‘Multiple times per month’.



The majority of audience respondents in Vancouver listen to recorded music online through on-demand streaming platforms (Youtube, Soundcloud and subscription streaming services - 47.6%), followed by physical music formats (Vinyl and CD - 22.3%) and Radio (17.5%). Over two thirds (64.5%) of audience members spend more than CAD \$300 per year on music, while 12.4% spend CAD \$100 or less yearly. In 2016 Canada made up just 1.8% of global physical sales, although vinyl sales covered 22% of physical sales in Canada. Streaming proved to be the most successful aspect of Canadian music revenues, as USD \$127million was made from streaming platforms (156% increase)⁸². All respondents who

⁸² *Global Music Report 2017, Annual state of the industry*, IFPI 2017
<http://www.ifpi.org/downloads/GMR2017.pdf>

attend live music ‘once per week’ spend more than CAD \$300 in a typical year, making it the highest-spending group. People who attend concerts multiple times per week closely follow, with 87.5% saying they spend over CAD \$300/year on music, as well as those attending live music multiple times per month (72.5%). Audience engagement is a critical challenge identified by over half of music industry respondents (54.8%). Artists who rate audience engagement as a challenge have played an average of 23.3 local shows in the last year, whereas artists who consider ‘Engaged audiences’ to be an asset played 29.7 local shows on average.

All-ages accessibility appears to be a key issue perceived by the local music industry, affecting both the live music infrastructures and the recorded music sector in Vancouver. It is perceived that there is an indifference to music and music events among local population of any age. Therefore, promoters, artists and the music industry must go the extra way to bring in and grow audiences of music products and events, according to participants.

A topic that created great discussion was audience development campaigns. There were many opinions on possible campaigns, including a suggestion of a promotional campaign to expand operating hours that could strategically use the Transit Shelter Advertising programme to encourage participation in night-time cultural activities⁸³. Having ‘access to information about music events’ was rated as an asset by over half of audience respondents (58.7%). It is considered a challenge mostly by people who currently don’t go to concerts often, such as respondents who never attend live music (100%) and those who attend once or twice per year (62.5%). The most common sources for learning about live music performances in Vancouver according to audience respondents are: Facebook and websites for artists, venues and specialised events, and newsletters. Street posters, venue/label/music store listings, printed brochures and word of mouth were also mentioned. The most frequently quoted local publications for event discovery in Vancouver were The Georgia Straight, Vancouver Sun, do604, Coastal Jazz and Blues, Disorder, CTR and Vancouver New Music. International platforms such as Songkick, Spotify, BandsInTown and the Live Nation app were also used to find upcoming local music events.

While some argued that having more flexible hours for concerts could help revitalise the local grassroots scene, participants recognised the geographic and cultural challenges that are affecting live music. Because everything is organised in territorial ‘pockets’, it is considered tricky to attract people from other areas of town into the different neighbourhoods. It was suggested that having more flexible showtimes in areas of the city could fit into a larger collaborative scheme, if venue operators could come together to increase diversity of programming to encourage audience development.

⁸³ <http://vancouver.ca/people-programs/transit-shelter-advertising-program.aspx>

Audience development campaigns could work to increase and retain diversity in audiences. The response from participants was that audiences are mostly Caucasian, despite having diverse programming across different types of venues. However, it was noted that in the for-profit sector, there were said to be very few promoters encouraging crossovers to book First Nations and the larger diversity of talent in Vancouver, limiting the diversity of audiences. Diversifying the music offering in Vancouver should aim to promote activities in different boroughs through different event capacities. The current scene, especially at night-time, is segregated in areas and parties for ethnic communities, with only few exceptions in Downtown Vancouver. Another challenge and opportunity identified was to further involve the under-age and young adult population with the local music scene. Only 6.6% of survey respondents were 25 years or younger. There is a perceived decrease in live music demand from the younger generations. This was explained as being partially attributed to the challenges in producing all-ages shows as well as the strong influence of mainstream music in the local media.

Audience development needs to come from many aspects of the music industry. As mentioned in the Artist Development section, concerns about accessibility in Vancouver venues create limitations to potential audiences. It was also remarked that the City has not supported accessibility funds for venues so far, and that further support from the province would help to increase accessibility in local venues. A suggested solution to these challenges would be to develop by-laws and incentives to increase venue accessibility. Existing venues could be eligible for funding to adapt their spaces. This is already being implemented in Ontario with the Accessibility for Ontarians with Disabilities Act⁸⁴.

Audiences need to feel safe attending venues and events. On this matter, the roundtable highlighted the positive role of the underground community and venues in keeping the music alive in rapidly-changing Vancouver. Artists remarked that despite the safety and drug use problems in some neighbourhoods, the arts and entertainment scene is vibrant thanks to the efforts of the members of the local underground scene. However, from an audience perspective, the underground music scene is increasingly moving into areas with high crime and drug use rates; with many young people attending such events, this could create potentially dangerous situations⁸⁵. The appearance and safety of these areas are considered to be detrimental to attracting tourists to the area. Vancouver has some systems in place to provide a safe environment for staff and patrons. One programme tackling night-time problems is the Good Night Out campaign, launched in 2015 and targeting places in Vancouver where young people gather in the city, as well as clubs, venues, bars and high-transit areas at night-time (eg Granville Entertainment District). This campaign provides workshops and training for staff, and through posters in venues, lets patrons know how to report any harassment via an app or Facebook account⁸⁶.

⁸⁴ <https://www.aoda.ca/guide-to-the-act/#standards>

⁸⁵ <http://old.ubyssey.ca/culture/vancouver-underground-music-562/>

⁸⁶ <http://www.goodnightoutcampaign.org/city/vancouver/>

Although this has been adopted by a number of venues, the interviewee pointed out that many are reluctant to pay for this service.

NB: Since writing this report, Mayor Robertson put forward a motion to pursue opportunities for a collaborative funding partnership to support the Good Night Out campaign⁸⁷.

Local talent and the variety of genres in Vancouver are among the highest rated assets in the ecosystem. The diverse music scene in Vancouver offers Hip-Hop, Rap, Rock, Pop, Folk, Classical, First Nations, Electronic and Punk to the local community. Our survey respondents showed the most common primary genres in Vancouver are Indie/Alternative (17.2%), Rock (15.5%) and Classical (15.5%); closely followed by Jazz/Blues (8.8%), Folk/Roots (7.2%), Pop (6.7%) and Dance/Electronic (5.8%). There are organisations and meeting groups providing visibility and diversity in the local music scene. Examples of these are the feminist collectives Genero⁸⁸ and the West Coast division of Women in Music Canada⁸⁹. The roundtable noted that industry studies developed by the province and other organisations do not reflect the fast-paced music industry and lifestyle changes. For instance, it was implied that the demographic switch in Vancouver is leading to a narrow diversity in programming, mostly affecting low- to mid-sized grassroots venues that contribute to artist and scene development. Some genres appear to be more affected than others due to the underrepresentation of promoters (eg Hip Hop), and the perceived ‘built in’ audience of some venues.

The main area of engagement was said to be through music education advocacy from parents (discussed in more detail in the ‘Education’ section). As we will see in this section, it seems that many event-goers stick to their local areas, due to transport and promotion limitations.

There was a mixed response to the affordability of tickets for audiences. Students and other social groups currently benefit from affordable ticket pricing in Vancouver for concerts in a number of venues⁹⁰. However, this was followed up with comments that students and music students aren’t consistently utilising this. In order to make events prices accessible, many promoters we talked to noted that Pay What You Can was their model of door revenue. That being said, it was mentioned in some interviews that the increasing price of live music affects the traction some genres can have towards new and younger audiences. Although there are a number of free music festivals and concerts available in Vancouver⁹¹, the higher cost of live music tickets compared to DJs and electronic music nights was mentioned. The knock-on effect of this is that participants are

⁸⁷ <http://dailyhive.com/vancouver/city-of-vancouver-granville-entertainment-district-2018>

⁸⁸ <https://genero.bandcamp.com/>

⁸⁹ <https://www.womeninmusic.ca/>

⁹⁰ <https://music.ubc.ca/student-ticket-deals/>

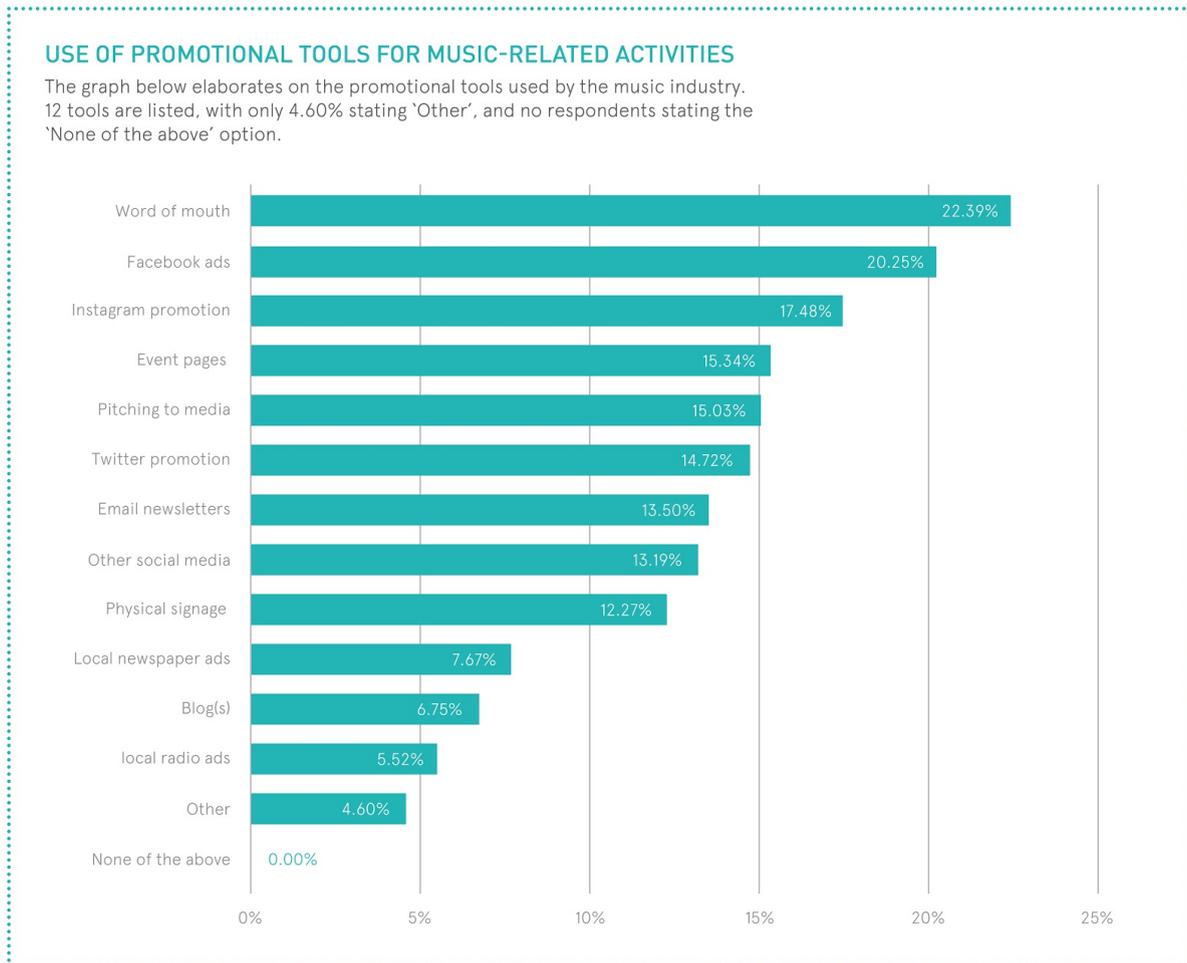
⁹¹ <https://vancouverbestplaces.com/entertainment/free-outdoor-concerts/>

concerned that nightclubs and mainstream events are being chosen instead of live music gigs.

The local media can make a huge difference to awareness levels and attendance figures for available local music. While our survey research has shown the numerous platforms to promote music, gigs and events, during our Artists roundtable the feedback was that there is a lack of platforms for promoting music to local audiences. It was mentioned that Vancouver's underground electronic music scene is increasingly getting more international exposure, but many locals are still unaware of it. Interviewees pointed out that specialised media in Vancouver appears to be comprised mostly of radio stations and online platforms⁹², and that specialised printed media is almost non-existent. The sector argues that smaller publications are increasingly pressured by economic constraints and do not meet the requirements to be eligible for grants. To alleviate this, it was proposed that an incentive for media publications helping the local grassroots community could be developed, bearing in mind that many publications cannot afford to register as a business. Participants highlighted the variety and quality of local music, home to a 'thriving community', but it is apparently difficult to find where music activities take place. This could be attributed to the fact that there is not a central media reference to check and find concerts in Vancouver, outside of social media profiles. It was mentioned that calendars exist, but nothing that can be easily updated. Even with this, it was said that events are often hidden on purpose, with the intention of maintaining exclusivity of underground events. Music industry respondents in our survey use, on average, 7 promotional tools. The most used method to promote music activities by Vancouver's music industry respondents is Word of mouth (22.4%), followed by Facebook ads (20.3%), Instagram promotion (17.5%) and Event pages (15%). Among the least used promotion tools are Local radio ads (5.5%), Blogs (6.7%) and Local newspaper ads (7.7%).

⁹² <http://www.bcmusic.ca/broadcast-media/>

Figure 30. Use of promotional tools for music-related activities



When analysing only the sample of artists with incomes of CAD \$999 or less from their music, results are slightly different. Artists in this group use an average of 5 promotional tools, most commonly Word of mouth (84.6%), Event pages (61.5%), Facebook ads (56.9%) and Instagram promotion (52.3%). Physical signage is the following most used method, used by 38.5% of the low-income group.

Local involvement

As previously mentioned, it is noticeable that many feel the local music scene isn't being given a voice in the mainstream local media, and that there is a gap in the market for

specialist printed media. Developing a relationship between the local music scene and the media would provide a larger platform for promoting gigs, records and festivals.

A strong underground electronic music scene has formed in response to regulation burdens, shortage of available space, and concern around personal safety in the Granville Street Entertainment district⁹³ (although this has created new concerns for safety). However, the general consensus of this scene is that a successful, tight-knit community has been created. The interviewees stated that the underground music community has strength in numbers and has bonded over the strong relationships and communities they have cultivated through hosting concerts and parties. Respondents from our survey also remarked that ‘Sense of community’ is among the highest-rated assets for heavy concert-goers (attending once a week or more often) and among the highest-rated challenges for infrequent concert-goers (attending once or twice per year or never). There are a number of concerns around manifesting the vision to grow and develop the scene, but, according to some interviewees, they believe it has worked to create a group of talented electronic music artists, and is gaining acclaim for this⁹⁴. While good relationships may exist within the same genre of music, it was noted that there is some level of disconnection between other genres. A shared belief from the group was that classical music operates in a different environment to the independent and mainstream music sectors in Vancouver.

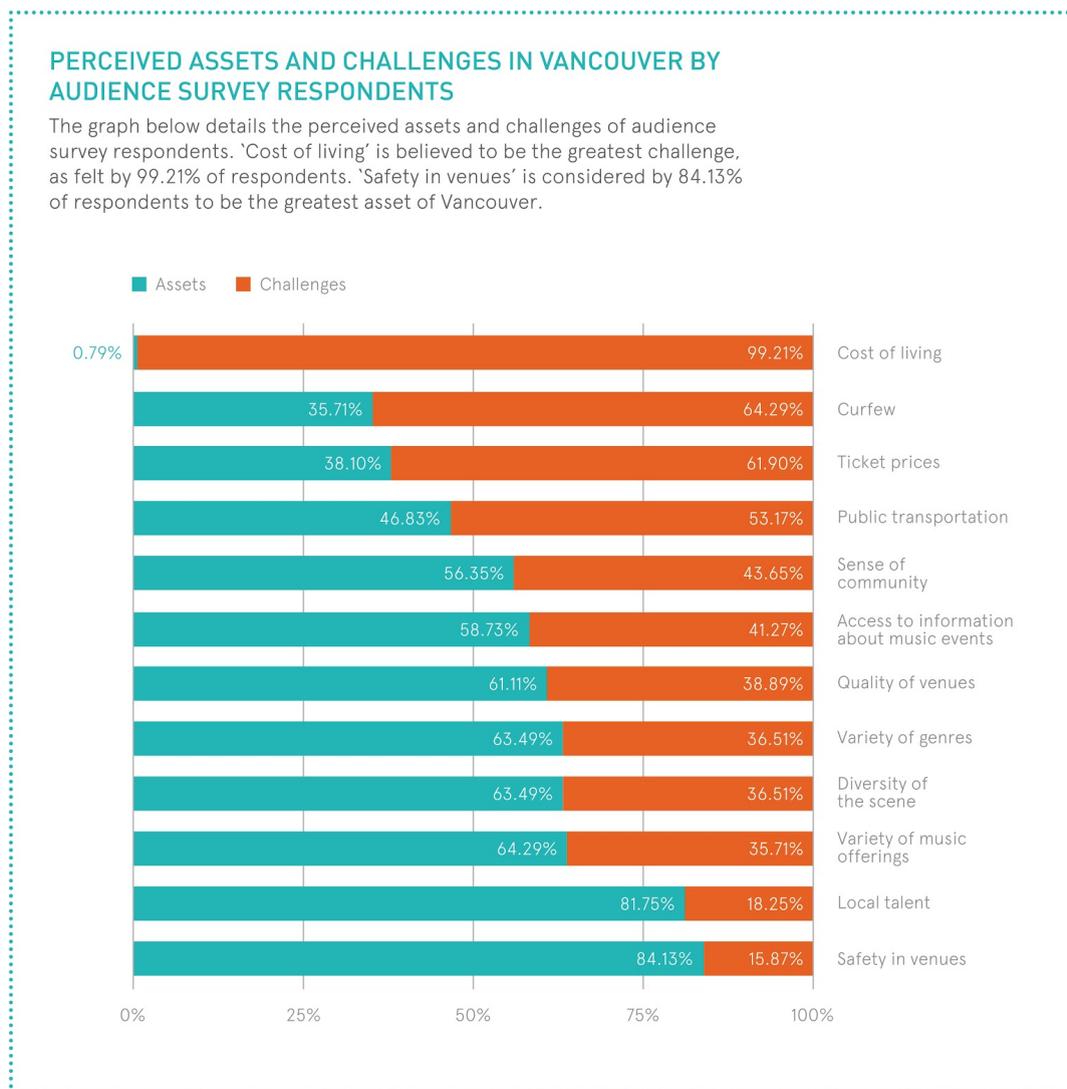
We found that heavy concert-goers who attend live music performances once or multiple times per week represent 11.1% of the audience sample. This group enjoys live music in a variety of venues, evenly quoting all types of spaces from classical-focused venues (for example, Orpheum Theatre and Annex, Chan Centre, Playhouse) to restaurants and grassroots/underground venues (such as Rickshaw Theatre, Guilt & Co., The Astoria Pub, Frankie’s Jazz Club). Audience respondents who attend local live music ‘once or twice per year’ or ‘never’ represent 8.7% of the audience sample. This group considered the main challenge in the ecosystem to be the ‘variety of genres’, followed by ‘ticket prices’, ‘access to information about music events’ and the ‘sense of community’. Such respondents also listed Vancouver’s large-capacity mainstream venues (Roger’s Arena, BC Place, Orpheus, Commodore Ballroom, Vogue Theatre, etc.) as their current preferred venues for music. The group of less frequent concert-goers overall rates more qualities as ‘assets’ in the ecosystem than the rest of the audience sample. Their highest rated assets are ‘Local talent’, ‘Safety in venues’ and the ‘Sense of community’. Virtually all audience respondents (99.2%) consider the cost of living in Vancouver to be the most pressing challenge in Vancouver’s music ecosystem, followed by curfews (64.3%) and ticket prices

⁹³ https://thump.vice.com/en_ca/article/mbjmky/vancouver-electronic-scene-female-feature

⁹⁴ <https://www.straight.com/music/664751/vancouvers-seasons-electronic-music-festival-comes-underground>

(61.9%). The best rated quality of the ecosystem is ‘Safety in venues’ (84.1%), closely followed by ‘Local talent’ (81.7%).

Figure 31. Perceived assets and challenges in Vancouver by audience survey respondents



A noticeable disparity between the local music community and the City has emerged from our conversations. During one roundtable, the group stressed that government bodies could make greater efforts to engage the local and regional independent media and promoters to highlight diversity in Vancouver’s music scene. There is also perceived competition between the private sector and City-supported events, partly due to the aforementioned grants process that makes more funding available to non-profit organisations. There was notable discontent about public infrastructures. Participants shared the opinion that there needs to be clearer dialogue between the industry and the

City to make sure that infrastructure works for both sides. Currently, outdoor events must stop playing music after 10pm (see Appendix 1), which is pushing certain types of gigs and events to areas (particularly underground) where sound complaints aren't received - although there is a wide belief that this often ties in to areas with higher levels of access to drugs.

The movement and closure of venues and events was discussed in many of our interviews, and it became clear that part of the problem was negative relationships with neighbours. Interviewees showed a clear sense that music is viewed as a nuisance to communities. Kitsilano district in particular, was noted as facing a number of complaints during the Kitsilano Music Festival, now that more families have moved into what was previously a retirement area. There are cases of groups sharing their expertise, which may help with community outreach. The Vancouver Chamber Choir works towards improving music education in the province by organising open visits for schools. It also collaborates with the Health Arts Society and the United Way charity in BC to give back to the community through music⁹⁵. Regulations affecting special event licenses were also blamed for limiting the activities available to promote local music, such as block parties and outdoor festivals, where the community can socialise (see Appendix D). There is a strong belief that this confines most music events in Vancouver to the indoor venues and night-time programming. There are cases of groups sharing their expertise, which may help with community outreach. The Vancouver Chamber Choir works towards improving music education in the province by doing open visits for schools. It also collaborates with the Health Arts Society and the United Way charity in BC to give back to the community through music⁹⁶.

Vancouver is home to a number of successful industries, including film and tech. Talent attraction and retention in Vancouver is becoming an important topic for companies. Many mentioned that tech workers, in general, are not engaging with the local music scene. It is believed this is, in part, due to the visa regulations - the Express Entry visa aimed at skilled immigrants only lasts for 1 year⁹⁷ - which means there could be less motivation and time to form relationships with the local music scene. Attempts to create partnerships are underway - notably one of the perceived outcomes of Creative BC funding so far is that there is an increase in incentivised cross-collaboration among sectors, such as gaming and music - although it was noted that more could be done to tie music into the local film sector. Our roundtables and conversations revealed strong support for utilising other industries to create partnerships, although this is yet to happen.

Vancouver does not currently have dedicated staff for music within the Cultural Services Department. There is, however, an Arts and Culture Policy Council that advises Council

⁹⁵ <https://vancouverchamberchoir.com/outreach/>

⁹⁶ <https://vancouverchamberchoir.com/outreach/>

⁹⁷

<https://www.canada.ca/en/immigration-refugees-citizenship/services/immigrate-canada/express-entry/after-apply-next-steps.html>

and staff on civic programs related to arts and culture⁹⁸, as well as a Vancouver Film Office⁹⁹.

Music tourism

Vancouver already has a clear strategic framework in place for tourism, but music is noticeably absent from it, other than in passing comments¹⁰⁰. The city has tools in place that could be used to improve music tourism, such as its highly-rated airport, its geographic positioning for international tours, well-known artists, and its position as the 3rd largest centre for music production in Canada.

Our research revealed limited packages for tourists outside of sight-seeing, although the Tourism Vancouver website does list concerts, festivals and music events¹⁰¹. That being said, the involvement of hotels and ticket packages seem to be limited.

Vancouver had 10.3million visitors in 2017 - a record number for the city¹⁰². A number of interviewees we spoke to believe that there is a deficient entertainment offer for visitors/tourists. In order to change this, the city needs to create appropriate infrastructures through the use of public transport, the hospitality industry, and licenses and permits, to help host events that will lead to audience satisfaction. This would result in a visitors returning, as well as new people coming to the city for music purposes. In order to develop the music scene further to increase its renown among tourists, there also needs to be more focus on what venues are programming. The sector interviews demonstrated disappointment in the number of 'safe bet' acts being programmed, such as cover bands, over acts playing original music. Alterations to this will improve local, national and international interest in the Vancouver live music scene.

Vancouver hosts a number of incredibly successful festivals, which draw visitors from near and far. This gives audiences the impression that live music is a seasonal event to attend, rather than something which should be thought of as a year-round reason to visit. City infrastructure should be focused on supporting and encouraging this growth by providing

⁹⁸ <http://vancouver.ca/your-government/arts-and-culture-policy-council.aspx>

⁹⁹

https://www.creativebc.com/industry-sectors/motion-picture/location-resources/metro-vancouver/bcfc_industry_contacts/433.php

¹⁰⁰ <http://ticketstonight.ca/includes/content/images/media/docs/5-year-strategic-framework.pdf>

¹⁰¹ <https://www.tourismvancouver.com/events/seasonal-events/>

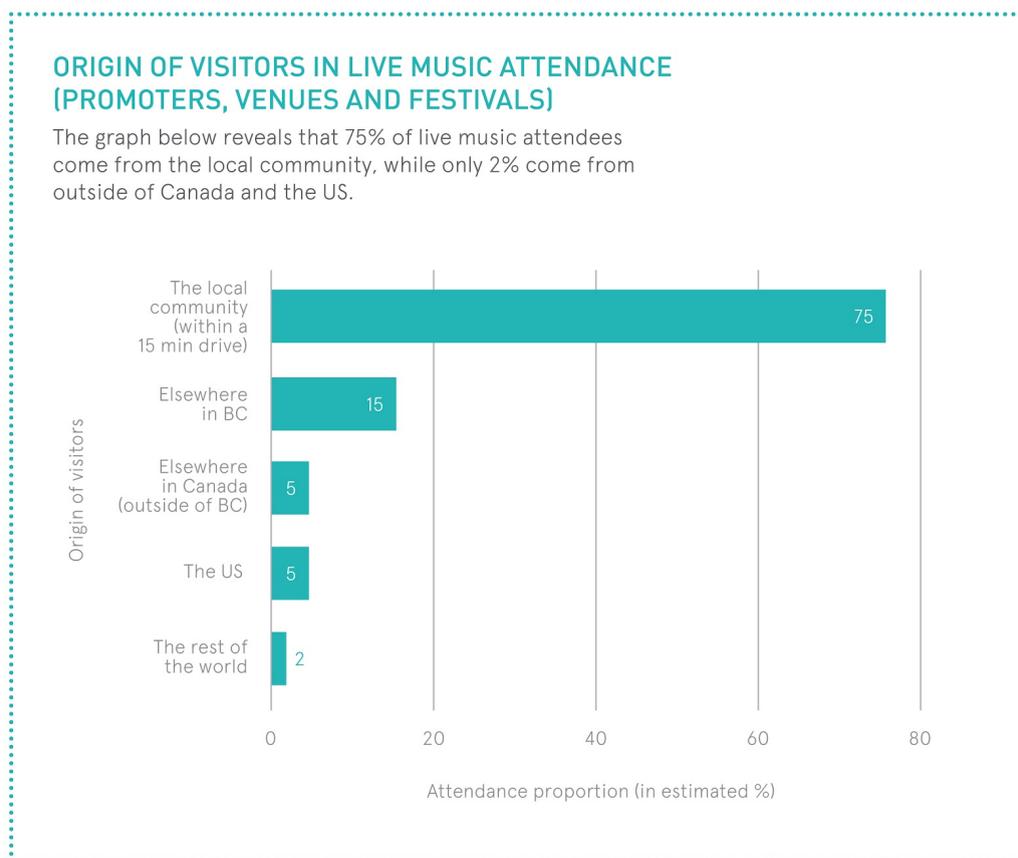
¹⁰²

<https://www.tourismvancouver.com/media/corporate-communications/vancouvers-tourism-industry-fast-facts/>

additional accommodation options during times when there is a shortage of hotel beds, and when there is a lack of new hotel developments¹⁰³.

Local audiences are the main consumers of live music in Vancouver, according to survey results. However, the majority of venues (62.1%) and festival respondents (64.3%) do not have a system in place to identify where their audiences come from, and only 28.6% of respondents booking shows or festivals have ticketing information that would indicate the origin of visitors.

Figure 32. Origin of visitors in live music attendance (promoters, venues and festivals)



Respondents marketing their festivals mainly promoted the events in the local community (47.7%), followed by promotion ‘Elsewhere in BC’ (22.7%), the US (13.6%) and Canada (11.4%). However, almost three quarters (74%) of visitors to shows, events and festivals came from the local community, according to the data collected or estimated by

¹⁰³

<http://www.westerninvestor.com/news/british-columbia/hotel-and-housing-developers-battle-for-vancouver-land-1.23128893>

respondents; 17.3% of local events are exclusively attended by locals. No respondent has more than 50% visitors coming from BC, Canada and abroad.

Future perspectives

In assessing the current situation, participants reflected on the history of live music in Vancouver. They said the live music culture has undergone substantial changes since the 1990s. Interviewees said that today, major artists and arenas are part of the musical culture of the city, and there's an increased perception of live music as an activity to be planned in advance. Not all positive changes were discussed, however, as it was also said that in the 2000s, promoters booking increasingly more 'safe bet' acts (such as top 40 covers, classic rock) set a certain musical standard for the audience. On the regulatory side, the Stanley Cup riots¹⁰⁴ and increased gang activity strengthened nightlife policing, although their effects ultimately increased red tape and restrictions for all events. Participants said that this has challenged all-ages events in licensed venues, which are now virtually impossible due to regulations. All in all, the live music offer in Vancouver was judged to have changed in recent years, since the rebranding or closure of struggling venues¹⁰⁵. In terms of underground music scenes, interviewees talked about how Vancouver's underground community has developed in the past 20 years but currently struggles to reach and open doors to younger people. Artists highlighted the need to overcome the increasing lack of original music; they put the responsibility on promoters to ensure there is a balance of all-genre events and specialised venues.

Our discussions revealed a number of perceived opportunities for Vancouver music in the future. The 2020 objectives for Vancouver Greenest City presents opportunities to integrate local culture and music to build stronger communities and promote social inclusion, for instance through family-friendly events¹⁰⁶. Currently, there are public spaces that could be used to develop actions to serve these objectives, as well as articulating a plan of temporary and mixed uses at existing spaces to develop a community-oriented programming. Major areas believed to offer many opportunities are those of Virtual Reality (VR) and Augmented Reality (AR). It was suggested that a VR ecosystem map is produced, to better understand where opportunities exist for production. It was mentioned that the behind-the-scenes footage is a key selling feature of DVDs, and VR/AR could capitalise on this. Concerts in VR/AR with behind-the-scenes opportunities would humanise musicians, creating better marketing opportunities overall. The VR/AR scene in Vancouver is still very young, but it's growing rapidly¹⁰⁷. There are two upcoming VR/AR expos happening in

¹⁰⁴ <https://globalnews.ca/news/2763636/looking-back-5-years-since-stanley-cup-riot/>

¹⁰⁵ <http://vanmag.com/city/vancouvers-venue-crisis/>

¹⁰⁶ <http://vancouver.ca/files/cov/Greenest-city-action-plan.pdf>

¹⁰⁷

<https://www.straight.com/life/1024876/why-metro-vancouver-has-become-world-leader-virtual-and-augmented-reality>

Vancouver in 2018 and it was of the opinion of many that they could provide opportunities to showcase Vancouver as a global VR/AR capital¹⁰⁸. Another perceived opportunity is the number of non-traditional spaces available in Vancouver. The music sector feels there are accessibility issues in Vancouver spaces, observing a gap between commercially-oriented music venues and those owned by the City. It is agreed that these spaces would benefit from a cohesive branding and communication campaign towards the music sector, so that they can be used for permanent (eg rehearsing studios) or temporary (eg one-off rehearsal spaces for touring bands) uses. In order to attain this goal, participants agreed on making greater communication efforts to promote the availability of City-owned venues to the local music sector.

¹⁰⁸ <https://www.vancouverconventioncentre.com/events/consumer-virtual-reality>

6. Strategic Recommendations

6.1 Summary of Recommendations and Actions

Table 2. Summary of Recommendations and Actions

<p>MAIN ACTIONS</p>	<p>Appoint a Music Officer within the Mayor’s Office.</p> <p>Create a Vancouver Music Advisory Council, evolving the Music City Steering Committee into an official council.</p> <p>Extend existing ‘music-friendly’ policies to key activity areas.</p> <p>Assess requirements for the City of Vancouver to support non-profit organisations in the creation of grants for the commercial sector.</p> <p>Reassess the criteria and requirements for the Vancouver Civic Theatres programme to enable support for non-profits in their creation of grants for the commercial sector.</p> <p>Build a music hub that includes accessible rehearsing/jamming spaces, co-working spaces, multi-purpose rooms and a performing stage.</p> <p>Increase the number of Special Occasion Licenses for small capacity venues.</p> <p>Develop a music communication campaign including online presence, marketing and communication materials.</p>
<p>NEXT STEPS</p>	<p>Provide artists and music professionals with free assistance in key areas of the music economy and current City requirements.</p> <p>Set up a monthly meeting with Film, Tech and Community advisors within City Hall.</p> <p>Measure the impact of the local music sector through a satellite account.</p> <p>Develop a Canadian Music Cities Alliance.</p> <p>Streamline permits and licenses required to produce music events in public spaces.</p> <p>Mediate between venues and residents to ease sound complaints.</p> <p>Create a grant to increase attendance at music and cultural events.</p> <p>Create a micro-grant for staff training in night-time music venues and clubs.</p>

	<p>Provide a regulatory framework to facilitate temporary leases for local music and cultural organisations in non-traditional spaces.</p> <p>Test a curfew extension with selected venues and event promoters in industrial areas.</p> <p>Extend night-time transport availability in key entertainment areas.</p> <p>Create a network of schools to provide music education as a joint effort.</p> <p>Develop a music internship and mentorship database.</p> <p>Set up a ‘Fair Play’ certificate for venues to promote good practice in artist booking.</p> <p>Organise educational talks and workshops in partnership with local organisations to grasp current and future opportunities available in Vancouver.</p> <p>Start a city-wide ‘friends of Vancouver music’ membership programme.</p> <p>Introduce music programming as part of existing cultural events in Vancouver.</p> <p>Activate music spaces and places as daytime community assets.</p> <p>Promote youth-organised concerts in civic centres and other community spaces.</p> <p>Encourage information-sharing between local venues and festivals to promote year-round music activities in Vancouver.</p> <p>Define the role of the stakeholders in the promotion of Vancouver as a music-friendly city.</p>
<p>FURTHER ACTIONS</p>	<p>Strengthen and further develop collaborations with international music cities.</p> <p>Assess the implementation of an ‘Agent of Change’ principle in key activity areas.</p> <p>Provide grants to support access to live music for musicians, professionals and audiences with diverse abilities.</p> <p>Provide ‘quick’ live music audience development grants and in-kind support.</p> <p>Create a micro-grant for media publications that grow and promote the local grassroots music scene.</p>

	<p>Work with the Province to develop more flexible liquor licensing to allow minors into establishments and events hosting live music.</p> <p>Promote a 3-star certification for venues and promoters applying internal safety, accessibility and diversity policies in all levels.</p> <p>Advocate for more live/work and housing support programmes for the creative industry sector that are inclusive and accessible for musicians.</p> <p>Organise a creative exchange programme for international artists and musicians.</p> <p>Provide lodging opportunities for artists coming to Vancouver to record, perform or network in the city.</p> <p>Develop a winter music destination event, with the collaboration of music stakeholders and the grassroots sector.</p> <p>Create an industry programme for the proposed music destination event.</p> <p>Allocate a section of the proposed music destination event to be organised by a local professionals' coalition.</p> <p>Explore the possibility to develop a BC music quota for local radio stations and mainstream media.</p> <p>Assess the development of an online show to promote local emerging artists.</p> <p>Integrate local music in the design of Vancouver's visitor experience.</p>
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List of Recommendations

6.2 Municipal support

6.2.1 Recommendation 1: Reinforce positions within City Hall to support the development of the music sector.

Initiators: Cultural Services Department; Music Cities Steering Committee.

Background: The City is aware of the challenges derived from permit applications for events in the music sector, involving lengthy processes that fall under different jurisdictions and regulatory mechanisms. The music sector highlights the necessity of an overall efficient process that would benefit City-run and private events alike, including a clear line of communication with the City to address cancellation of approved events and other misfortunes. Overall, the music sector feels disconnected from City Hall and demands a clear figure within City Hall to support its growth, in a similar way to the existing Film Officer. Interviews and survey data show that artists are not aware of City services and resources available to them, including the Special Events Office, the Events and Liquor Licenses manager, the Concierge at Cultural Services and the Vancouver Public Libraries.

Opportunities: According to the City departments interviewed, the Tourism and Cultural Departments could be increasingly ingrained and share development opportunities through the use of music, especially music events. Other opportunities which became apparent during the interviews include the Cultural Concierge evolving into a full-time position within the Cultural Services department, as well as the intention to build or acquire further venues and spaces in the future for cultural uses. A spokesperson to mediate between the sector and City Hall would help address existing issues (eg sound, closure of venues) and encourage sector development.

Goal: The existence of the Music Officer will bridge the existing gap between the public and private sectors within the music ecosystem in Vancouver. It will be a dedicated point of contact to inform the music sector what resources and support from the City and BC are available. As an executive position, the Music Officer will advocate and negotiate better deals for the music industry in terms of licensing, permits and other City-related matters. Internally, the Music Officer promotes a clear communication channel for music-related matters, streamlining processes internally and cutting down application times.

Actions:

6.2.1.1 Appoint a Music Officer within the City Manager’s Office.

Vancouver’s music ecosystem would greatly benefit from having a clearly branded Music Officer who is familiar with the sector and City departments, their bureaucracy and regulatory requirements. This position should advocate, inform and execute policies on the City Manager’s office and inform the sector of the opportunities and possible challenges in areas such as regulation, policy and funding. The availability and assisting capacity of the Music Officer should be promoted within City departments and externally to the sector to maximise its effectiveness. The previously analysed cases of Toronto’s Music Development Officer and Seattle’s Music Office should be viewed as positive role models in the development of the Music Officer’s mandate for Vancouver.

A micro-site for Vancouver’s Music Office should be developed as Vancouver’s digital ‘music industry information hub’ including an ‘about’ page and contact information, FAQs, links to relevant external resources and organisations, as well as direct links to apply and check the status of permits and City-related bureaucracy.

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

Vancouver’s music economy would benefit from the provision of assistance and training on key issues (eg fiscal, legal, management) for music artists and professionals, ideally securing one-to-one appointments with specialists to help them more effectively. Such sessions should be coordinated with the Music Officer and provided by City Hall to encourage a diversity of skills and knowledge among the local music sector.

In addition to these individual sessions, the sector would benefit from having informative sessions and access to case studies of Vancouver regulatory requirements, as suggested during the interviews. Some of this information is already available on the City of Vancouver’s website, but in-person sessions would better overcome the doubts of inquirers and assess the streamlining of bureaucratic processes. Critical topics for industry professionals and artists to be developed as case studies include: current requirements and limitations of special events and liquor licenses (professionals and businesses), regulation and permits for outdoor music events, busking regulations, requirements and availability to rent City-owned spaces, etc.

BEST CASE EXAMPLE: MUSIC POOL BERLIN¹⁰⁹

Music Pool Berlin is the central point of contact for Berlin musicians and music industry

¹⁰⁹ <https://musicpoolberlin.net>

professionals. It offers consulting services and training by industry experts, serving as a hub for resources as well as networking with other participants in the local music sector. The initiative is a cooperation project run by 2 organisations and receives funding from the City of Berlin and the European Union. Music Pool Berlin provides a free 45-minute orientation consultation for artists and music industry workers to explain basic concepts, such as social security management or how to join a collection society.

In addition to this, expert consulting sessions and coaching appointments are available for booking at affordable rates (€10-20 per session), and the organisation develops several workshops during the year on specific topics (eg branding, social media strategies, songwriting). Music Pool Berlin also has an email address to send questions to regarding the music business, and it organises monthly community evenings at different venues in the city to promote its activities.

6.2.1.3 Set up a monthly meeting with Film, Tech and Community advisors within City Hall.

Music can be used as a tool for improving public health issues, dealing with addiction and homelessness, and make a more tolerant, diverse and greener city. The implementation of incentives to encourage cross-sector developments would be best assessed by conducting monthly advisory meetings between the Music Officer and Film, Tech and Community sector representatives. Such advisors should include the Mayor's Engaged City Task Force, the Vancouver Economic Commission and the Film Commissioner, among others.

Policy and financial incentives should be set up to link these sectors, such as: a quota of local music in products created by companies benefiting from tax incentives (eg Creative BC's PSTC¹¹⁰ and FIBC¹¹¹ in the film sector); a grant for organisations working in social and health issues engaging with musicians or music organisations in their programme; creating regular cross-sector talks and mixers for professionals and stakeholders; including music in tech events that already exist in Vancouver (eg #BCTechSummit¹¹²).

¹¹⁰

[https://www.creativebc.com/database/files/library/Tax_credit_information_Foreign_October_2016\(3\).pdf](https://www.creativebc.com/database/files/library/Tax_credit_information_Foreign_October_2016(3).pdf)

¹¹¹

[https://www.creativebc.com/database/files/library/Tax_Credit_Information_Domestic_OCTOBER_2016\(2\).pdf](https://www.creativebc.com/database/files/library/Tax_Credit_Information_Domestic_OCTOBER_2016(2).pdf)

¹¹² <https://bctechsummit.ca/>

6.2.1.4 Measure the impact of the local music sector through a satellite account.

Mapping, measuring and evaluating the impact of the local music sector is necessary for checking its health and capacity regularly. Develop a satellite account for the music sector and link it to the increasing interaction with the music ecosystem, including updating place scraping information, conducting annual surveys and focus groups, regular economic impact and employment checks, etc. A data collection and management framework developed in collaboration with music companies and events will regularly assess their methodology and results and optimise the maintenance of the satellite account.

6.2.2 Recommendation 2: Empower the Vancouver Music City Committees to represent and champion Vancouver as a music-friendly city on the local, provincial and national level.

Initiators: City Hall; Music City Steering Committee; Music City Advisory Committee.

Background: The Music City Steering Committee and the Music City Advisory Committee were formed to examine Vancouver's music ecosystem and analyse opportunities and challenges across the local industry, its infrastructure and music community. The implementation of the recommendations in the local music industry would require a representative body comprising the diverse makeup of the sector that can also act as a mediator between the industry and the public sector. Affordability of housing and work spaces are the greatest challenges for the sector in Vancouver, according to survey data and interviews.

Opportunities: The Vancouver Creative City Strategy will align the vision for music and culture in the city, aiming to build partnerships across communities. The Vancouver Music City Steering and Advisory Committees will play a pivotal role in the implementation of music-related actions within the Vancouver Music Strategy as well as the Vancouver Creative City Strategy.

Goals: To have a leading industry representative body that helps establish, promote and maintain Vancouver as a music-friendly city; connect with other cities to share best practices, information and talent exchange; advocate for the sustainability of the music sector in the city, including the affordability of living and working spaces.

Actions:

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

Creating a Vancouver Music Advisory Council emanating from the Music City Committees will ensure sector representation and buy-in across the implementation of a music-friendly strategy. The Music Officer (or a representative of the Cultural Department until the Music Officer role is set up) should run the working commissions, which would meet separately every month and together every three months. The Music Officer will attend all the meetings. Commissions would be permanent and rotate members to involve as wide a variety of the industry as possible.

An inception meeting should be set up to determine the key topics to address, develop the appropriate commissions for each and assign the most suitable members to populate them. Examples of working commissions would be ‘International Relations’, ‘Diversity & Accessibility’, ‘Music Tourism & Events’, ‘Education & Youth’, and so on. Each commission should have at least 4 representatives from varied sectors within the music ecosystem, and there should be no more than 5 commissions, including the Executive Commission. The Executive Commission will review all the actions proposed in the working commissions and make sure the approved ones move forward, either through the work of the commissions or the appointment of someone external if necessary.

Each commission will develop its own working programme, comprising a timeline and evaluation framework to measure the accomplishments of Vancouver’s goals as a music-friendly city. It is recommended that the executive commission is paid, and that the rest of the Committee members involved in a working commission get a fee for each meeting they attend, in order to ensure their commitment and professionalism.

6.2.2.2 Strengthen and further develop collaborations with international music cities.

The success of the actions implemented by Vancouver would be amplified by collaborating and joining forces with other music cities around the world. Joining an existing Music City network such as UNESCO Creative Cities¹¹³ and the Music Cities Network¹¹⁴ will strengthen and amplify the benefits of implementing a music-friendly strategy. Options for collaboration with existing music cities include developing a ‘city sisterhood’ to share best practices in policy and encourage artist exchange, similar to Austin-Toronto’s Music City

¹¹³ <https://en.unesco.org/creative-cities/home>

¹¹⁴ <http://musiccitiesnetwork.com/>

Alliance¹¹⁵, and developing a City-led music industry exchange network such as the Music Cities Network's Residency Program¹¹⁶.

6.2.2.3 Develop a Canadian Music Cities Alliance

An increasing number of Canadian cities and towns have developed a music strategy in the past years. Vancouver and Music BC should develop and lead a new national alliance between such cities and territories that would serve as a networking, talent exchange and knowledge-sharing platform. The existence of dedicated Music Officers and music specialists in the City Halls of cities across Canada would facilitate the setup of a shared mission, vision and programme for the Canadian Music Cities Alliance. The Alliance should also study the implementation of a fund to encourage artistic and professional exchange by developing a talent booking network for the participating cities and provinces.

6.2.3 Recommendation 3: Revise existing policies and planning tools to promote a 'music-friendly' Vancouver.

Initiator: City Planning, City of Vancouver; Vancouver Music Advisory Committee.

Background: The Granville Entertainment District area has been transformed by changes in venues' curation, ownership and residential additions, and according to interviewees it is no longer considered a 'destination area' to see live music spontaneously or discover new artists. City Planning has identified that the number of complaints are mostly coming through the activity and industrial zones, and it is still high despite having tools such as the 'Good Neighbor Agreement'¹¹⁷ in place. Sound Control Bylaw 6555c¹¹⁸ includes different clauses promoting quietness in public and private premises and sets the limit for continuous sounds in activity/event zones at 70dB from 7am to 10pm and 65dB during night-time (measured at point of reception); however, measurements at the exterior of extended-hours liquor establishments must maintain sound levels below 80dB or 75dB depending on the zoning. In addition to this, regulatory frameworks that affect busking locations can be confusing for artists, as sound limits can vary in the same street.

Opportunities: The Northeast False Creek Plan¹¹⁹ contemplates music-friendly policies, such as the requirement for new residential buildings to meet higher standards of acoustic

¹¹⁵ <https://www.toronto.ca/wp-content/uploads/2017/08/9648-backgroundfile-63954.pdf>

¹¹⁶ <http://www.musiccitiesnetwork.com/projects-details/residency-program>

¹¹⁷ <http://council.vancouver.ca/20170614/documents/cfsc4.pdf>

¹¹⁸ <http://former.vancouver.ca/bylaws/6555c.pdf>

¹¹⁹ <http://vancouver.ca/files/cov/northeast-false-creek-plan.pdf>

performance, the requirement of notice to purchasers and residents that their residence is part of an events and entertainment district, as well as opportunities for public space stewardship to ensure cultural vibrancy of the area. Other cities in the world are developing music-friendly policies to develop their music ecosystems, such as the Agent of Change principle¹²⁰, which have turned into ‘best case’ examples. City departments interviewed explained the need to develop a more streamlined process for applying for licenses of music events-related permits, following the requests demanded by event producers and cultural organisations¹²¹.

Goals: Using policy to improve coexistence between music spaces and places, organisations, street performers and residents; cluster music spaces and places to boost economic activity; increase safety and diversity of music spaces and places in Vancouver; increase sustainability and significance of music spaces and places in Vancouver.

Actions:

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

Considerations to encourage more music events would include giving concessions to for-profit organisations for events in public property, developing a blanket license to facilitate the bureaucratic requirements from the different City departments, and revising the Noise Exemption Permits¹²² for a decibel limit increase to up to 85dB until 11pm. Obtaining Special Occasion Licenses for every small happening are obstacles to the success of this action, for which the City of Vancouver could work with stakeholders in the provincial level to encourage a vibrant year-round music programme in the city. The City should also work with the Park Board to encourage more amplified music events in public spaces such as beaches and parks, through a more streamlined application and bureaucratic process.

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

Measures such as the entertainment-friendly policies embedded in the Northeast False Creek Plan should be expanded and adopted in other districts and culturally-vibrant areas. This is an important step for the protection and further development of music spaces and places in the city. The previously analysed case study of Montréal’s Quartier des

¹²⁰ https://www.designingbuildings.co.uk/wiki/Agent_of_change

¹²¹ <http://vancouver.ca/doing-business/event-permits.aspx>

¹²² <http://vancouver.ca/home-property-development/noise-bylaw-exception-permit.aspx>

Spectacles and parking regulations can be further examined for the implementation of this recommendation in Vancouver.

6.2.3.3 Mediate between venues and residents to ease sound complaints.

Although venues and promoters should be held accountable for sound-related nuisances, industry and City interviewees noted that sound bylaws and issued complaints are generally based on unrealistic expectations. To work through this, the City should act as a proactive mediator, engaging in community meetings to enable residents and venue owners/event promoters in high-activity areas to collaborate on sensible solutions. The analysed case study of San Francisco's Entertainment Commission assuming the responsibility of handling music venue-related sound complaints is a positive example in the implementation of this action.

6.2.3.4 Assess the implementation of an 'Agent of Change' principle in key activity areas.

New developments and the arrival of new residents to high-activity or industrial areas can threaten the cultural vibrancy created by long-standing venues and programmes. The Agent of Change principle is a protective policy used in cities around the world to hold new developments accountable for sound attenuation. Its implementation in Vancouver should be assessed to better serve the necessities of cultural operators in expanding development areas, including sound attenuation measures when a proposed residential development is within 50 metres of existing live music performance venues. The 'Agent of Change' should be triggered automatically when a new planning permit application is lodged to initiate the sound attenuation assessment.

BEST CASE EXAMPLE: THE 'AGENT OF CHANGE' APPLIED IN CITIES AROUND THE WORLD

The Victoria state government in Australia was the pioneer of the 'Agent of Change' planning policy in 2014. This Agent of Change integration does not change the legal noise limits, but rather ensures new developers pay to soundproof against the legal limits if needed¹²³.

Toronto proposed a three-warning system in 2015. Following a noise complaint, the venue will assess its infrastructure. A second complaint sees the Film & Entertainment

¹²³ <http://www.musicvictoria.com.au/resources/agent-of-change-explained>

Industries unit mediate a compromise. A third complaint requires the Agent of Change to act¹²⁴.

San Francisco's Agent of Change Law ("London Breed Amendment") was approved in December 2015¹²⁵ and requires venues to maintain the sound levels they operate at within the limit of its entertainment permit in order to remain under legal protection. It is the responsibility of the developer to inform any new residents of the existing sound in the area. San Francisco also protects music venues from hotel and motel sound complaints within 300 feet of the venue¹²⁶.

The UK government has supported the 'Agent of Change' to protect music venues since January 2018, although it has not yet been translated into policy. It is currently expected to have its second reading debate in May 2018¹²⁷.

NB: Since the writing of this report, the date for the second reading debate has been moved to July 2018.

6.2.4 Recommendation 4: Create a point-based evaluation system for grants to support the wider diversity of Vancouver's music ecosystem.

Initiators: City of Vancouver; Creative BC; Music BC; Vancouver Music City Committees.

Background: Data gathered in this study suggests that the majority of music organisations in Vancouver are for-profit (68.6% of respondents) and the area of operational/performance grants would have the most impact from increased government support (as agreed by 86.2% of respondents). Key funding opportunities, such as the Critical Assistance Grants, provided by the City, are inaccessible for most of the interviewed organisations operating in Vancouver because they require a 10-year lease¹²⁸, or are aimed at registered non-profit organisations.

Opportunities: Existing grants with potential to further support the music sector include the City of Vancouver Critical Assistance Grant for Cultural Facilities¹²⁹, the Cultural Infrastructure Grant¹³⁰ and the Cultural Operating Grant¹³¹. On a provincial level, Creative

¹²⁴ <https://www.toronto.ca/legdocs/mmis/2015/ma/bgrd/backgroundfile-84014.pdf>

¹²⁵

<https://www.sfgate.com/bayarea/article/S-F-supes-back-music-venues-against-noise-6244544.php>

¹²⁶

<http://www.sfweekly.com/news/nightlife-legislation-expanded-include-hotel-motel-development/>

¹²⁷ <https://services.parliament.uk/bills/2017-19/planningagentofchange.html>

¹²⁸ <http://vancouver.ca/people-programs/critical-assistance-grant-for-cultural-spaces.aspx>

¹²⁹ <http://vancouver.ca/files/cov/critical-assistance-grant-information-guide.pdf>

¹³⁰ <http://vancouver.ca/files/cov/culture-grants-infrastructure-guidelines.pdf>

BC's new grants programme, Amplify BC, will provide CAD \$7.5million in funding to support music projects for the commercial sector and not-for-profit organisations¹³².

Goals: To increase the support available to the diversity of Vancouver's music ecosystem; contribute to the growth and sustainability of the not-for-profit and for-profit music sectors in Vancouver; encourage accessibility to Vancouver's live music ecosystem for underrepresented audience groups such as persons with diverse abilities and under-aged music individuals.

Actions:

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

A points-based evaluation system could assess incoming grant requests and prioritise organisations (regardless of their profit status) that produce music events, festivals and shows which ensure diversity of staff and programme, in terms of culture, gender, abilities, age, contributing to a better representation of the ecosystem. The enforcement and evaluation of this action should also extend to other areas such as industry gatherings, music education programmes, and other training and networking opportunities benefitting from City support in Vancouver. This data should be used to evaluate the possible consequential increase in accessibility and diversity of the support provided by the City to its local music ecosystem. If this cannot be developed by City Hall because of the Vancouver Charter, then support should be given to non-profit organisations to create grants for the commercial sector.

BEST CASE EXAMPLE: CITY OF BERLIN'S POP IN THE HOOD FUNDING PROGRAMME¹³³

The Musicboard Berlin GmbH (subsidiary organisation of the City's Department of Culture) invests in the Berlin pop music scene by supporting innovative ideas and projects that benefit the music scene and the city. One of its available programmes is 'Pop in the Hood', an assistance fund for projects that deliver music activities encouraging acceptance of live music in a particular neighbourhood. There are 2 calls for projects annually; submitted proposals must have a minimum budget of €10,000 to justify their benefit contribution to Berlin's pop music scene and industry.

The programme's focus in 2018 aims to further support activities that increase diversity in the city's music scene, prioritising projects that promote women in pop culture and strengthen the LGBTQ and POC scene.

¹³¹ <http://vancouver.ca/files/cov/Culture-Grants-2018-Operating-Information-guide.pdf>

¹³² <https://www.creativebc.com/programs/amplify-bc>

¹³³ <http://www.musicboard-berlin.de/en/funding/pop-in-the-hood/>

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

Performing artists and audience members with disabilities are one of the most vulnerable groups, and should be prioritised in terms of access to grants and additional support in the live music sector. For instance, it was highlighted in interviews that musicians with reduced mobility cannot access most restrooms and backstage areas in Vancouver venues. In the scoring scheme, musicians with disabilities should score higher when applying for artist grants, such as travel opportunities funding, as well as organisations developing music programmes for people with diverse abilities. Venues and other music spaces that ensure and promote accessibility standards for staff and performers with disabilities should also obtain a higher score than those who don't.

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

Venues, festivals and promoters championing audience development should be made eligible for new 'quick' grants or match funding assistance in exchange for information on their programmes: data regarding the number of different artists programmed, content performed, proof of age inclusivity and other scoring variables, as well as adhering to the 'Fair Play' action suggested in action 8.4.

BEST CASE EXAMPLE: CITY OF SYDNEY'S LIVE MUSIC GRANTS

The City of Sydney's Live Music and Performance Grants¹³⁴ take place twice a year, offering up to \$30,000 matched cash funding for projects of not-for-profit and for-profit organisations as well as businesses within the City of Sydney's local government area. Eligible funding is available for capital investments that will help venues manage sound transfer, improve their health and safety measures, and improve or expand their existing programming.

134

<http://www.cityofsydney.nsw.gov.au/community/grants-and-sponsorships/business-grants/business-support-grants/live-music-and-performance>

6.2.4.4 Create a grant to increase attendance to music and cultural events.

The City of Vancouver should develop an audience development grant to increase participation in local cultural activities, emphasising music programming. The target beneficiaries would be people with disabilities and low-income demographics, such as the under-aged, unemployed and retired population. This programme should provide eligible Vancouver residents with ‘ticket credits’ to book tickets for concerts and cultural events from participating venues and promoters, for free or at a special discount, in order to bring them into local venues and theatres. Participants would need to register and have confirmation of their eligibility to participate. The Cultural Services department should evaluate a 6-month programme trial to assess its impact and future needs for developing music and cultural audiences in Vancouver.

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

The efforts of independent organisations and media promoting the local grassroots and emerging artists increase the value of local music to their audiences, but their sustainability is continuously challenged, interviewees told us. College radio stations, specialised publications and freelance music journalists would benefit from micro-grants to help sustain their promotion of the local grassroots and emerging artists. Potential beneficiaries should be able to demonstrate the capacity in which they provide development opportunities to local artists and professionals, their audience reach, investment and participation in the local scene, and their overall contribution to the profile of Vancouver as a music-friendly city.

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

It was highlighted in interviews that communication skills training and lack of diversity (eg gender, ethnicity, experience) among night-time industry staff could amplify the negative consequences of conflicts arising. However, venues’ financial situations do not allow them to prioritise paying for specialised training and consequent staff-leave time. To tackle this, the City of Vancouver should develop micro-grants that ensure staff diversity at night-time establishments, and training so they have adequate skills and tools to confront harassment, violence and other situations threatening the safety of patrons and themselves.

NB: As already mentioned, the Mayor is encouraging funding partnerships with the Good Night Out campaign.

The analysed case study of Montréal's gender equality advisory group (Conseil des Montréalaises) and other initiatives to combat sexual harassment at music places can be further examined to assess the criteria for this grant in Vancouver. The micro-grants to provide staff training and certifications could involve and help expand organisations and programmes working to increase night-time safety, such as Vancouver's community policing¹³⁵, Good Night Out¹³⁶, Karmik¹³⁷, WISH¹³⁸, AMS Safewalk Program¹³⁹ and others. The evaluation of the implementation of this action will be key to assess future necessities and challenges in Vancouver's nightlife.

6.3 Spaces and Places

6.3.1 Recommendation 5: Increase the number of affordable music spaces and places available for artists and professionals.

Initiators: City of Vancouver; Creative BC; Music BC.

Background: Access to affordable working spaces is a challenge for Vancouver's music sector. Affordability of living and working spaces was largely quoted as a priority area to benefit from increased government focus, naming also the need to raise industry fee standards, and protecting and increasing affordable rehearsing and jamming spaces. Survey results indicate that the most pressing challenges for the local music sector are the affordability of housing (voted as a challenge by 87.4% of music industry respondents) and the affordability of work and/or rehearsal spaces (70.53%). Current restrictions to short-term leasing for music, cultural organisations and activities, offer little to no reward for developers and landowners for temporary leases to cultural organisations.

Opportunities: In alignment with Vancouver's Housing and Homelessness Strategy¹⁴⁰ and the Empty Homes Tax¹⁴¹, empty warehouses and buildings that have been purchased for land value speculation should be used to temporarily increase music spaces and places in

¹³⁵ <http://vancouver.ca/police/community-policing/index.html>

¹³⁶ <https://www.goodnightoutvancouver.com/>

¹³⁷ <http://www.karmik.ca/>

¹³⁸ <http://wish-vancouver.net/>

¹³⁹ <https://www.ams.ubc.ca/services/safewalk/>

¹⁴⁰ <http://council.vancouver.ca/20171128/documents/rr1appendixa.pdf>

¹⁴¹ <http://vancouver.ca/home-property-development/empty-homes-tax.aspx>

Vancouver; the Vancouver Music Centre Feasibility Study¹⁴² provides a comprehensive argument for the opportunity and capacity to develop a music hub in the city based on sector demands and needs.

Goals: Increase the availability of affordable working and living spaces for professionals in the local music sector; allow a physical venue where artists and professionals can meet and collaborate creatively and professionally in Vancouver; connect the local music scene with creative and professional opportunities in the region, in Canada and abroad, while supporting Vancouver as a music-friendly city.

Actions:

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

A proactive approach should be taken, with in-kind or reduced-tax benefits for space owners, or through an additional obligation in a similar way to the Public Art¹⁴³ programme. Such leases would be available for non-profit and charity organisations as well as for for-profit organisations to provide affordable working spaces for the music ecosystem. To be selected, organisations would need to provide evidence of how their activities will engage and contribute to the community, and justify the ways they enhance the diversity and vibrancy of the local music and cultural scene. The City of Vancouver could act as a mediator to assess the framework in which this lease would take place, such as the duration, use limitations, obligations of each part, etc.

BEST CASE EXAMPLE: KREATIVE RÄUMEN WIEN, VIENNA¹⁴⁴

Kreative Räumen Wien is the city's office for 'activating vacant spaces', managed directly by the City of Vienna and 3 other agents: a representative of the cultural industries, a representative of the real estate industry and a legal advisory company. Kreative Räumen acts as an intermediary by connecting relevant City departments with potential users of vacant spaces, the real estate owners, and providing any additional legal advisory services required. The consortium has developed over 400 unused space activations since 1999 and signed cooperation agreements with over 100 different owners and real estate companies¹⁴⁵.

Kreative Räumen provides vacant spaces in specific urban development areas in Vienna to local companies and professionals in the creative industries as part of the City's

¹⁴² Donald Luxton and Associates Inc. (2014). Vancouver Music Centre Feasibility Study.

¹⁴³ <http://vancouver.ca/parks-recreation-culture/public-art.aspx>

¹⁴⁴ <https://www.kreativeraemewien.at/>

¹⁴⁵ <https://www.wien.gv.at/wirtschaft/betriebe/kreative-raeume.html>

strategic promotion of the local cultural and creative sector. Spaces are used for a variety of purposes and timeframes, including as exhibition spaces, offices, performance spaces and artist workshops, which are determined in advance during the mediation of the City with the interested lessee and lessor.

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

The Underutilized Spaces Grant¹⁴⁶ and Theatre Rental Grants¹⁴⁷ programmes should be redesigned to further support music organisations, including artist-run events and programming by for-profit organisations that support the music ecosystem through the established criteria (eg booking young local talent, granting all-ages access, focusing on accessibility for cultural groups). As suggested in Recommendation 4.1, if this cannot be completed by the Vancouver Civic Theatres programme, then support should be given to non-profit organisations to create grants for the commercial sector. Space rentals should be expanded to more city-owned theatres and there should be an increase in their flexibility, since interviews highlighted that organisations wanting to engage in the programme may have different needs and capacities (eg able to provide its own staff and crew, not able to cover required security costs). Each Civic Theatre/venue requirements would potentially be more autonomous and adapt depending on its location to avoid competition with existing venues.

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

Artists and music professionals, especially at the beginning of their careers, struggle to dedicate the hours needed to perfect their craft and skills since they mostly complement their income with non-music jobs. By creating accessible spaces for the music sector to work and play, Vancouver will support the developing and retaining of the grassroots scene and allow individuals to focus on their musical careers. The number and capacity of the hub should be assessed by the Music City Advisory Committee to ensure it is suitable for the needs of the professionals in Vancouver. Ultimately, the centre should act as a professional development hub for Vancouver by providing access to learning, rehearsing, performing and networking opportunities to the music sector.

¹⁴⁶

<https://vancouvercivictheatres.com/media/3023/vancouver-civic-theatres-underutilized-spaces-grant-guide-2018.pdf>

¹⁴⁷ <http://vancouver.ca/files/cov/culture-grants-theatre-rental-guidelines.pdf>

BEST CASE EXAMPLE: TREMPOLINO, NANTES¹⁴⁸

Trempolino is a music hub located in the city of Nantes, France, funded by a coalition of public and private organisations and deeply rooted in the community. It is structured as a ‘music campus’ within the publicly-funded creative hub cluster Les Fabriques Laboratoire(s) Artistique(s)¹⁴⁹. Trempolino is considered a ‘project for projects’ and its organisation involves 29 staff, 8 specialist music teachers and 16 advisory members. It also engages around 80 freelancers to deliver workshops and provides learning opportunities for over 50 interns and trainees simultaneously.

The music hub is conceived as a grassroots community and research centre; its services and artistic programming are aimed at music fans, musicians and music professionals from all ages and backgrounds. Membership is required (€5 yearly fee) to book the rehearsing and recording facilities, while the exhibition and performing space is available to any organisation, including provision of financial support if it is needed, to deliver content at the venue. Most of the services and support provided through the music office comes from the Pays de la Loire region, including the available grants, financial support and distribution networks.

Trempolino’s facilities are spread across 7 floors in a 2,300 square metre building. It hosts a café and performing stage, a regional information/services office, and different facilities available for booking: office spaces and meeting rooms, 9 rehearsing rooms, 5 classrooms, 2 recording and pre-production rooms, and a pop-up recording studio on the rooftop. Its services also include a dedicated music store for local artists and Trempolino members, Irma¹⁵⁰ - an advisory centre for resources and development opportunities, the headquarters for regional music media Tohu Bohu¹⁵¹, and Trempo Fabric’/Trempo Ditrib’/Trempo Garantie¹⁵² - affordable music pressing, publishing-distribution and financial support services.

6.4 Night-time economy

6.4.1 Recommendation 6: Revise existing policy and licensing tools to promote a more diverse and safer night-time economy.

Initiators: City of Vancouver; Vancouver Music City Committees; Government of BC.

¹⁴⁸ <https://trempo.com/>

¹⁴⁹ <http://www.lafabrique.nantes.eu/>

¹⁵⁰ <http://www.irma.asso.fr/>

¹⁵¹ <http://www.tohubohu-media.com/>

¹⁵² <https://federation-octopus.org/wp-content/uploads/dossierdoLabels.pdf>

Background: According to interviews and survey data, red tape, liquor licensing, operating hours and financial constraints are the main barriers that exclude a variety of participants from Vancouver's nightlife. Live music is prohibited in most licensed premises between 1am and 9am¹⁵³, while late night events (without alcohol) are licensed on an individual basis through lengthy processes, and are required to be a minimum of 28 days apart¹⁵⁴.

Interviewees told us regulation requirements are forcing music activities to relocate to unlicensed and illegal venues. It appears to be increasing the number of unsafe music spaces in certain areas of Vancouver. Some commercial music promoters are testing the relocation of their events to other regions in the metro area where there is more permissive licensing. The underground music sector representatives we consulted said they felt self-policing was adequate within their communities. According to them, increased policing at night-time would be detrimental to the vibrant underground scene in Vancouver, as they prefer to directly address the issues with concerned neighbours instead of having the police closing the venues as a solution.

Opportunities: Interviewed City Planning staff have identified opportunities to expand the number of live music licenses in vibrant entertainment areas such as Main Street, Commercial Drive and Kitsilano; the Vancouver Healthy City Strategy¹⁵⁵ includes the goal to increase the feeling of safety at night-time; existing programmes in Vancouver to address conflicts due to alcohol consumption, gang violence and sexual harassment have proved successful and necessary to the sustainability of its night-time economy.

Goals: Increase the sustainability and diversity of music spaces and places in Vancouver; increase participation of all-ages audiences in music activities; expand the availability of safe music spaces and places at night-time; provide reliable and safe transport options to travel to and from night-time activities and venues throughout Vancouver.

Actions:

6.4.1.1 Work with the Province to develop more flexible liquor licensing to allow minors in establishments and events hosting live music.

Current liquor regulations are challenging all-ages access to music events because alcohol is restricted to certain areas (eg beer gardens) or the licence has to be temporarily revoked to allow minors. Venues and promoters said this increases the dependence on ticket sales to solely cover event costs and staff wages, discouraging them from organising more all-ages events. Working with the Province to develop a blanket license and

¹⁵³ <http://bylaws.vancouver.ca/4450c.PDF>

¹⁵⁴

<http://vancouver.ca/police/organization/operations/emergency-operations-planning/late-night-dance-events.html>

¹⁵⁵ <http://vancouver.ca/people-programs/being-and-feeling-safe-and-included.aspx>

requirements for venues and events including music programming (live bands and DJs) that allow under-19s into liquor-licensed premises during shows would ease the financial pressure on venues and allow an increase in programme diversity.

Breweries in Vancouver¹⁵⁶ are one of the licensed spaces with most potential to develop the live music offer, since their licence allows live music and dancing and also permits access to minors and the employment of minors as entertainers (eg under-aged music artists). This regulation amendment should encourage the production of night-time family-friendly and age-inclusive events in public spaces as well, using public spaces for low-key music events, open-air evening picnics or organising more block parties incorporating music.

BEST-CASE EXAMPLE: ALL-AGES ACCESS TO MUSIC AND ENTERTAINMENT VENUES IN CATALUNYA¹⁵⁷

The regulatory framework of Catalunya gives the responsibility to venue owners to decide if under-18s are allowed in the premises (the legal age to consume alcohol). Requesting IDs for proof of age prior to entering the venue or purchasing alcohol is strictly enforced.

Current policy allows individuals aged 16 and older to be in premises classified as nightclubs, entertainment venues, dance halls, music venues and music bars as long as live music activities take place. Under-16s must be accompanied by a supervising adult and must leave the premises after the show.

This regulation is overseen by different measures depending on the size (by square metre) of the premises, and include on-site inspections by the authorities, CCTV monitoring, installation of ‘person-counting’ cameras and infrared cameras or sensors.

6.4.1.2 Increase the limit number of Special Occasion Licences for small capacity venues.

Industry interviewees quoted the current limitations of Special Occasion Licences as a major limitation for the development of a diverse, constant music offering in Vancouver. The City should work together with BC liquor licensing bodies and demonstrate the multiple benefits of extending the limit of Special Occasion Licenses for small-capacity venues (under 100) hosting live music/DJ programming, from the current 3 SOL to 6 or 8 monthly licenses. Venues would be required to have a good track record in accessibility

¹⁵⁶

<https://www2.gov.bc.ca/assets/gov/employment-business-and-economic-development/business-management/liquor-regulation-licensing/guides-and-manuals/manufacture-handbook.pdf>

¹⁵⁷ http://www.icab.es/files/242-217297-DOCUMENTO/reglament_espectacles_publics.pdf

(age-inclusive, adapted for use by people with diverse abilities, etc), health and safety matters and proof of providing a positive impact in the community (eg daytime/community uses of venue, addressing noise complaints with neighbours).

6.4.1.3 Promote a 3-star certification for venues and promoters applying internal safety, accessibility and diversity policies in all levels.

Championing accessibility and diversity from the public and the private sector by developing ‘best practice’ certifications will acknowledge that venues not only comply with policies and regulations but also excel in terms of safety, accessibility and diversity. This certification should be obtained after the positive evaluation of venues that successfully apply diversity and safety procedures among staff, and champion accessibility and diversity of patrons, staff and external professionals working on site. The action proposes that the certification awards one star per area (safety, accessibility, diversity), with the possibility of excelling in one, two or the three aspects. This can be linked to the posterior evaluation of venues benefitting from training grants as proposed in the actions 4.3 and 4.6 as well as ‘best practice’ in hiring artists as proposed in action 8.4.

Alongside the implementation of this certification, City Hall could explore the possibility of developing an annual award for local venues and their staff, with a cash prize, to reward venues of different sizes and capacities so more are encouraged to excel.

6.4.1.4 Test a curfew extension to selected venues and event promoters in industrial areas.

Since transport is not available after 11pm in many areas, approving considerably extended curfews will increase safety in areas surrounding remote music spaces (eg light industrial and industrial zones), allowing patrons to stay inside until transport is available to get home safely. The analysed international case study of Brisbane, Australia, would be a positive example to consider for implementation in Vancouver. Venues in safe night precincts are issued six one-off permits per year to operate until 5am (normal curfew is 3am), while venues outside the precincts may apply for up to 12 permits. Having extended licensed venues also stretches leaving time and minimises nuisances caused by attendees leaving different premises at the same time, trying to find transportation to get home. Extended curfews should be assessed on a regular basis to evaluate the venue’s contribution to the safety and vibrancy of certain areas, since the curfew extensions can ultimately be used as a tool to raise the profile of events in the city.

BEST CASE EXAMPLE: AMSTERDAM'S EXTENDED VENUE CURFEWS¹⁵⁸

Amsterdam City Hall gave 24-hour liquor and operating licenses to 10 venues in the outskirts to relieve pressure on downtown nightlife and tourism. Such venues now act as cultural destinations, while also providing services to the community in the daytime. Venues taking part in the Amsterdam Dance Event also have extended operating hours (8am instead of 4am), an exception granted in exchange for in-kind contribution from venues, such as street teams.

Longer opening hours, which have also been introduced in other areas in the city, have led to staggered dispersal and quieter patronage, rather than club-goers turned out onto the street all at once. Venues and events that receive special licences are evaluated on an individual basis to ensure that their cultural programming contributes to the attractiveness and diversity of Amsterdam. This requires extensive licensing work but is a long-term solution for the sustainability of tourism as well as the vitality of the city and its nightlife.

6.4.1.5 Extend night-time transport availability in key entertainment areas.

Much of the disturbance and nuisance linked to live music venues and nightclubs is related to people in the streets moving from one place to another, or trying to find a way home. Interviews and survey data show that extending hours of public transport could have a positive impact on Vancouver's music sector and night-time economy. Vancouver should develop a night bus network or an alternative public transport option after midnight on weekends, using key nightlife precincts as transit hubs in a similar way as the analysed case study of Brisbane, Australia. Additionally, the city should explore the possibility of increasing transit and private transport service options for increased convenience and safety all week long.

BEST CASE EXAMPLE: NIGHT NETWORK TRANSIT IN MELBOURNE¹⁵⁹

Public Transport Victoria has a comprehensive Night Network connecting suburbs and regional areas in the Australian province, including 24-hour public transport options on weekends¹⁶⁰. The night transit scheme has proven to be crucial to the development of its

¹⁵⁸

<https://www.billboard.com/articles/news/dance/8054022/amsterdam-nightlife-mayor-revolutionize-los-angeles-nightlife>

¹⁵⁹ <https://www.ptv.vic.gov.au/getting-around/night-network/>

¹⁶⁰ <https://www.premier.vic.gov.au/24-hour-public-transport-to-get-you-homesafe/>

night-time economy by providing safe, easy and cheap transport options. The City of Melbourne's Night Network is designed to provide an all-night train, tram, or bus service within 1km of the homes of 70% of Melburnians¹⁶¹. Free Tram Zones available in the daytime also apply to late night travel, helping locals and tourists move around Melbourne's core activities district.

The use of the night transit network is also encouraged through the recent 'Explore the night' campaign showing how specific Night Network routes serve to enjoy Melbourne's nightlife with a focus on live music activities. The campaign includes outdoor, radio and activations in its promotion, as well as artist-curated 'Up-Late Playlists' that can be accessed by scanning Spotify codes in posters around town¹⁶². Local musician Ecce Vandal produced its musical single¹⁶³.

6.5 Music education

6.5.1 Recommendation 7: Reinforce the local capacity and availability of music education programmes.

Initiators: City of Vancouver; Government of BC.

Background: Survey results show that 11.9% of artists claim to not have taken any music education or training, despite considering the availability of music education in Vancouver as 'good'. The 2015 BC music sector report *From Adversity to Opportunity*¹⁶⁴ notes a struggling music education sector, led by minimal instruction, teachers who do not specialise in music education, and lack of funding. During our interviews, music education representatives agreed the situation has not improved much since then, as music education has been postponed to later primary years, and middle school and secondary school programmes are often limited to optional after-school activities. Music teachers in Vancouver can come from varying educational backgrounds and musical skills, affecting the way music is being taught across educational levels and the consistency of programmes being taught in Vancouver.

¹⁶¹

<https://getinvolved.transport.vic.gov.au/night-network-all-night-public-transport-on-weekends/faq>

¹⁶² <https://open.spotify.com/user/7m7445s473gfiuspnqicyl9nn>

¹⁶³

<https://www.yranz.com/news/yr-melbourne-recruits-public-explore-night-using-public-transport-victoria>

¹⁶⁴

<https://musiccanada.com//wp-content/uploads/2016/02/BCs-Music-Sector-From-Adversity-to-Opportunity.pdf>

Career development pathways in education are not currently linked to music industry opportunities at the local level, according to interviewees. During secondary education, counsellors are often unaware of the wide variety of careers and jobs available in the music industry, which could dissuade students from pursuing a music career and/or music postsecondary studies. According to tertiary music education students interviewed, mentors available in Vancouver mostly come from a commercial background in major labels or from an early grassroots stage, which leads students to believe there are no available professional opportunities in the local independent music sector.

Opportunities: Music education is linked to a number of cognitive¹⁶⁵ and developmental¹⁶⁶ benefits in children and young people, including increased creativity, memory, maths and language learning, technical skills, perseverance, team working, which have been proven in research and medical studies; deepening funding cuts for music education around the world are provoking the appearance of independent organisations investing in programmes that employ music as a youth development tool.

Goals: Promote the benefits of music education among schooled children and young people; strengthen the foundation of the music ecosystem in Vancouver by linking students to opportunities in the local music sector and developing youth audiences; raise the profile of the music education curriculum in Vancouver to become a referent in BC and Canada; increase the number of specialist music teachers in BC.

Actions:

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

Interviewees stated the funding cuts and the non-compulsory curriculum for music education potentially excludes many young students from learning music in Vancouver. To address this, a city-wide strategy led by the City of Vancouver in collaboration with the Vancouver School Board and the Coalition for Music Education in BC should be created to explore the development of a music education network that will engage educators at elementary levels (schools and music schools) for the facilitation of music education to a wider number of students. This collaborative music education programme would engage students from different schools who would like to receive music lessons, enabling the hiring of music teachers that fit the abilities and backgrounds of the different students instead of their school age. These music education programmes would also provide music education opportunities for disabled children and be inclusive of the cultural diversity inherent to Vancouver.

¹⁶⁵ <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC3957486/>

¹⁶⁶ <https://well.blogs.nytimes.com/2012/09/10/early-music-lessons-have-longtime-benefits/>

BEST-CASE EXAMPLE: SISTEMA AOTEAROA, NEW ZEALAND¹⁶⁷

Music education in New Zealand has also been affected in the past years by cuts in key resources, such as budget allowance and availability of specialist educators. The Otago Music Arts Center (Otago, South Auckland) developed the Sistema Aotearoa as a development programme for local students aged 2-14. It uses ensemble music to enable participants to experience being an asset in their community, based on the Venezuelan (now international) El Sistema movement¹⁶⁸. The OMAC is a local government-funded community centre that includes a Sound Lab, a recording studio, and provides music lessons. The Sistema Aotearoa is developed in partnership with the Auckland Philharmonia Orchestra and many organisations and individuals within the community, including Creative New Zealand and the ministries of Education and Social Development¹⁶⁹.

In 2017 Sistema Aotearoa provided 1,034 individual students with high-quality, age/ability appropriate sessions which were structured to develop musical capability and enhance social and educational development. In addition to receiving musical instruction students performed at major concerts, an international conference and in the local community. An independent evaluation report on the outcomes of Sistema Aotearoa concluded that the programme contributed positively to increase student scoring and improved confidence, self-discipline and sense of belonging¹⁷⁰.

6.5.1.2 Develop a music internship and mentorship database.

Interviewed music students, artists and music educators said diversity gaps in mentoring opportunities are pushing graduates to pursue internships outside of Vancouver. A mentorship and training network database developed by the Music Office would help connect students with music organisations offering internships and traineeships, as well as with professionals with diverse backgrounds who are keen on mentoring. The Music Officer should also provide industry awareness sessions or alternative ways to inform secondary school counsellors about careers in the music industry so that students are engaged to pursue music tertiary studies and traineeships in Vancouver. In addition to this, the management of this database will help to connect young artists and aspiring professionals in university radio and media programmes with professional opportunities in the local music industry.

¹⁶⁷ <https://www.sistemaaotearoa.org.nz/>

¹⁶⁸ <http://fundamusical.org.ve/>

¹⁶⁹ <https://www.apo.co.nz/community-education/sistema-aotearoa/>

¹⁷⁰ [http://mch.govt.nz/files/Evaluation%20of%20Sistema%20Aotearoa%202012%20\(D-0452269\).PDF](http://mch.govt.nz/files/Evaluation%20of%20Sistema%20Aotearoa%202012%20(D-0452269).PDF)

6.6 Music Artist Development

6.6.1 Recommendation 8: Increase accessibility to artist development opportunities in Vancouver.

Initiators: City of Vancouver; Music Cities Committees; Music BC.

Background: Currently, the main innovation in Vancouver’s music industry is happening in the local underground scene, where artist development capacity is narrow. The previous Canadian music industry support and grants system had more power when it was able to push artists into the media and music consumption platforms. Although there is live music funding available for artists and professionals on the provincial level (such as Creative BC’s Live Music Program¹⁷¹ and Music BC’s Travel Grants¹⁷²), many people either do not know how to apply, or have been unsuccessful in previous applications.

Vancouver artists have mostly received music education or training to an advanced or professional level (57.7% among survey respondents). However, only 23% of respondents among this group of high-level musically-trained artists have also completed advanced or professional music industry education. Most music industry survey respondents agree there are not enough suitable venues for emerging artists in their community, and interviewees highlighted the rise of pay-to-play venues in the grassroots sector. In the for-profit sector, there were said to be very few promoters booking First Nations artists and the larger diversity of talent in Vancouver.

Opportunities: Creative BC’s new grants programme Amplify BC will provide CAD \$7.5million in funding to emerging artists, foster up-and-coming talent and support live music events in the province¹⁷³; helping artists grow will give recognition to Vancouver’s music scene and its international awareness; reducing the number of additional jobs artists and musicians do will help them focus on developing their craft and will contribute to ending sector precariousness.

Goals: Grow the number and quality of development opportunities available to Vancouver artists; increase accessibility to performing opportunities for a wider range of local artists; raise the profile of local artists that would represent Vancouver as a successful music-friendly city.

¹⁷¹ <https://www.creativebc.com/programs/amplify-bc#list-of-programs>

¹⁷² <https://www.musicbc.org/programs/music-bc-travel-grants/>

¹⁷³ <https://www.creativebc.com/programs/amplify-bc>

Actions:

6.6.1.1 Advocate for more live/work and housing support programmes for the creative industry sector, which are inclusive and accessible for musicians.

Vancouver's existing live/work housing programmes for creative professionals are unsuitable for most musicians because they don't include spaces where amplification is allowed. Programmes such as the Artist Studio Awards¹⁷⁴ from the City of Vancouver reflect this limitation in the number of available studios and the facilities that can be used by musicians. Therefore, future housing programmes with increased accessibility should include common or single-occupancy facilities suitable for use as rehearsing rooms, recording studios or performance stages.

6.6.1.2 Organise a creative exchange programme for international artists and musicians.

Developing songwriting camps, artistic residencies and other activities for encouraging collaboration between artists of diverse backgrounds and genres will reinforce the mission of Vancouver as a music-friendly city. Ideally, this action would be tied to **Recommendation 2** to reinforce existing and potential City alliances. The programme would build on existing Vancouver schemes, such as the artist fieldhouse programmes¹⁷⁵, and could be produced in collaboration with other organisations in the local music sector such as those in music education, music promoters, record labels, venues, and artist collectives.

6.6.1.3 Provide lodging opportunities for artists coming to Vancouver to record, perform or network in the city.

Artists benefit creatively and professionally from musical exchange, but currently most cannot afford to leave Vancouver to do so. Interviewees also said a lack of hotels and short-term lets caused a housing and networking challenge for recording artists who stay in the city for several weeks. Having a physical space where artists coming into Vancouver can be encouraged to stay longer would increase networking and business opportunities with the local sector. This action can be tied to the new development of a Vancouver music hub set out in Action 5.3.

¹⁷⁴ <http://vancouver.ca/people-programs/artist-studio-award-program.aspx>

¹⁷⁵ <http://vancouver.ca/parks-recreation-culture/fieldhouse-programs.aspx>

BEST CASE EXAMPLE: SOCAN HOUSES AND SOCAN SONG HOUSE¹⁷⁶

SOCAN Houses in Los Angeles, Nashville and Paris offer lodging to members and facilitate connections with the local sector to grow the careers and businesses of its members. Because of the affordability challenges in short- and medium-term stays in the cities, SOCAN Houses provides its members with opportunities for creative and professional exchange outside of Canada. Members use the lodging to support different activities in their destination city, including production and recording, pitching and promotions, networking or co-writing.¹⁷⁷

Additionally, the SOCAN Song House was developed in 2015 to provide songwriters the opportunity to connect and collaborate with other members in a limited time framework. It also provides a key professional development by connecting participants to venues and centres around Canada through regional tours. While this programme is not currently connected to the housing project, it could potentially be linked to the development of additional collaborative opportunities in the musician's city of choice.

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

Both Vancouver Music City Committees should develop a 'Fair Play' guide and principles that support local artists, promoters and venues to create fairer deals that help the creatives and the music ecosystem at large. While it would not be a mandatory requirement, it would be more encouraging if organisations such as venues, festivals and promoters eligible to receive local or provincial grants would need to provide proof of complying with this 'Fair Play' standard, including not having pay-to-play bookings and covering diversity quotas in their programme.

BEST CASE EXAMPLE: THE MUSICIANS' UNION'S FAIR PLAY VENUE SCHEME¹⁷⁸

The Musicians' Union advocates and promotes activism against unfair treatment of musicians in the UK. Its advocacy led in 2015 to the Fair Play venue scheme, which aims to "recognise good practice and stamp out the unfair treatment of musicians"¹⁷⁹.

¹⁷⁶ <https://www.socan.ca/>

¹⁷⁷ <https://www.socanmagazine.ca/features/socan-houses-an-inspirational-home-away-from-home/>

¹⁷⁸ <https://www.musiciansunion.org.uk/Home/News/2015/Nov/Fair-Play-Venues>

¹⁷⁹ Ibid.

The guide¹⁸⁰ contains advice for self-promoting artists in areas such as fair co-promotion deals, participating in competitions and showcase events, and submitting applications to perform at festivals. Musicians can submit their positive experiences at venues to get the owners involved in the Fair Play scheme, and after evaluation the venues can include a sticker to display as the badge of their respect for artists.

6.7 Music industry professional development

6.7.1 Recommendation 9: Encourage professional development in the local music industry.

Initiator: City of Vancouver; Cultural Services; Destination Development Department; Music BC

Background: Artists interviewed argue their professional state as musicians in Vancouver is challenged by wages/fees, their access to health security (for non-union artists) and business education. Interviewees also identified that artists in Vancouver and Canada struggle with business management due to a lack of skills or funds. The underground music community was highlighted as one of the most resilient and bonded groups in the local music ecosystem in spite of the lack of suitable places to produce events.

According to survey data, further efforts could be applied to provide more networking opportunities to non-male professionals in all music sectors. Recording sector interviewees remarked professionals are well-connected internationally on an individual basis, but there has not been a joint effort to promote Vancouver's recording sector abroad as a whole. The survey also indicates the 'sense of community' in Vancouver is a challenge for over one third of respondents, while two thirds of respondents are either unaware of or find it difficult to access crossover opportunities with other creative industries.

Opportunities: Existing provincial grants such as Music BC's Travel Grants¹⁸¹ and Creative BC's Live Music and Industry Initiatives grants¹⁸² support professional development opportunities for Vancouver musicians in touring, showcasing and networking abroad; Music BC provides 18+ professional development workshops and training programmes throughout the year; the Destination Development Department noted its funding from hotel tax and membership revenues could potentially be a funding source for music

¹⁸⁰ <https://www.musiciansunion.org.uk/Files/Guides/Playing-Live/Fair-Play-Guide.aspx>

¹⁸¹ <http://www.musicbc.org/programs/music-bc-travel-grants/>

¹⁸² <https://www.creativebc.com/programs/amplify-bc#list-of-programs>

events; grassroots collaboration on the professional level would likely increase revenue opportunities for the local sector year-round.

Goals: Increase professional development and business skills development opportunities for local artists and professionals; develop networking opportunities at a local level, to encourage professional development and improve the sense of community; maintain and grow existing support to connect Vancouver’s music sector with the international music industry.

6.7.1.1 Develop a winter music destination event with the collaboration of music stakeholders and the grassroots sector.

A music festival in Vancouver needs to draw from Vancouver’s best assets so it represents the city: multiculturalism, nature and the Greenest City Action Plan, wellbeing and healthy lifestyles, its big yoga community and food. Given the seasonal nature of Vancouver’s tourism, a world-class music festival appealing to this lifestyle can also partner with local skiing and snowboarding tourism stakeholders¹⁸³ and existing festivals in Vancouver and BC to encourage music tourism during ski season.

The Destination Development Department could play a stakeholder role in the development and resourcing of the festival, and the City of Vancouver should provide additional budgeting resources and in-kind support, such as free use of city-owned spaces, (eg Civic Theatres), for the duration of the festival. The event’s structure and duration would be adapted to the capacity of the city on the selected dates, as it could have the potential to become a themed ‘Music Month’, branding existing and special events, or partnering with local and regional organisations to produce a ‘sister event’ in Vancouver in the winter time.

BEST CASE EXAMPLE: RIFFLANDIA FESTIVAL, VICTORIA, BC¹⁸⁴

Rifflandia Music Festival takes place in Victoria, BC, across four days in 20 local music venues and other spaces. The event includes international headliners and mostly showcases Canadian emerging acts, with a record of 75% British Columbia artists in the 2017 edition¹⁸⁵. Rifflandia is deeply linked to Victoria’s music scene and the city in itself, with a high involvement of the local government and a wide array of businesses. Examples of actions with the business community include raffles to win products and

¹⁸³ <https://www.tourismvancouver.com/activities/skiing-snowboarding/>

¹⁸⁴ <http://rifflandia.com/>

¹⁸⁵ <https://www.musicbc.org/showcasing/spotlight-rifflandia-2017/>

services from selected local shops¹⁸⁶, and special deals and offers to festival-goers around festival dates from local restaurants and stores¹⁸⁷.

6.7.1.2 Create an industry programme for the proposed music destination event.

Building from the action in 9.1., Vancouver should pioneer an industry-oriented showcase and conference programme on the first day of the festival. Having an industry section of the festival would unite Canadian and international stakeholders to reinforce Vancouver as a music-friendly city, and provide further opportunities to collaborate with film and tech industries. The involvement of the City will be crucial to legitimise the objectives set by the event and ensuring that it happens in a way that connects, benefits and creates more opportunities for the local music sector.

6.7.1.3 Allocate a section of the proposed music destination event to be organised by a local professionals' coalition.

The professional music sector would be more encouraged to work collaboratively if there was a clear incentivised goal to do so, such as producing a grassroots festival as a collective organisation. Having this framework for collaboration would potentially increase collaboration outside of the scheme and improve the sense of community between the commercial and non-commercial music sectors in Vancouver, aside from the positive impact the festival would have on the local audience.

The starting point of this action would be to assign a project budget from the event budget and create an open invitation for all agents and organisations in Vancouver's music sector to organise a section of the music festival proposed in 9.1 and 9.2 (eg one or more stages, the conference, off-site events). The City (through the Music Cities Committees) should act as a leading body to organise a working commission where representatives should be appointed tasks and responsibilities in the delivery of the festival. Ultimately, this event would help generate a community among local professionals and broaden the possibilities of communication between the music sector and the City.

¹⁸⁶ <http://rifflandia.com/winlandia/>

¹⁸⁷ <http://rifflandia.com/wristband-connect/>

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

Vancouver needs to provide technical education options at all levels, to cover the demands of the sector and contribute to the development of the skills and quality of work of those not employed in technical jobs. Professionals interviewed said there was not only a shortage of local technicians available in peak festival season, but also a lack of technical knowledge (recording and engineering, event production, sound and lights, etc.) among professionally-trained musicians and music industry workers. Skill development support in key professional areas such as production, audience engagement or stage presence skills could be delivered to professionals through talks and workshops grounded to the reality of the sector in Vancouver.

By partnering with local organisations, these workshops and consulting sessions should be adapted to the participants' requirements by running a small survey or enquiry forms identifying urgent needs. Such needs should be then structured into a programme calendar to deliver the workshops, depending on the demand and capacity of the instructors.

BEST CASE EXAMPLE: MUSIC TALKS BY MUSIC AUSTRALIA¹⁸⁸

Music Australia is a 50-member national umbrella body spanning education, community and the professional industry. It delivers campaigns, information, resources, networking, community engagement, a national school music participation programme and demonstration projects. Among its education and dissemination activities is 'Music Talks', a series of seminars, panels and roundtables that are 'future focused' and based on issues affecting Australian music artists and professionals, such as new touring models, classical music-focussed sessions, and panels on the live music sector in Australia.

¹⁸⁸ <http://musicaustralia.org.au/participate/music-talks/>

6.8 Audience engagement

6.8.1 Recommendation 10: Increase and promote audience accessibility in the local live music sector.

Initiators: City of Vancouver’s Cultural Services Department; Vancouver music venues, promoters and festivals; Music BC.

Background: Those under 19 years old have challenges around accessibility of music in Vancouver, mostly due to the nature of liquor licenses and the financial dependence of venues on bar revenue. Interviewees argued that city grants for infrastructure development and operations, such as the City of Vancouver Critical Assistance Grant for Cultural Facilities¹⁸⁹, the Cultural Infrastructure Grant¹⁹⁰ and the Cultural Operating Grant¹⁹¹, do not help with small problems such as marketing activities or compensating bar revenue losses in all-ages shows. This challenge is aggravated by the displacement of music activities and audiences to areas with easier or non-existing regulation, often to unlicensed venues.

Specialised media in Vancouver appears to be comprised mostly of radio stations and online platforms. Local specialised printed media is almost non-existent, according to interviewees, and local influential media such as college and independent radios are largely unaware of funding opportunities and support available for them on the local level.

Research and interviews highlight a scarcity in policy that promotes accessibility for participation of persons with disabilities in the arts sector in Canada¹⁹². Vancouver musicians with disabilities have trouble finding suitable venues to perform in, can’t secure funding for tour dates in accessible venues, and regularly have to face the stigma behind the word ‘disability’ with local promoters. Interviewed professionals representing the live music sector have also noted the lack of ethnic diversity in live music audiences despite the diverse population in Vancouver, with only few exceptions in Downtown Vancouver.

Opportunities: Vancouver is considered the second most important city in Canada after Toronto when booking North American tours; key features have already been developed by some venues and organisations to retain existing audiences, such as patronage

¹⁸⁹ <http://vancouver.ca/files/cov/critical-assistance-grant-information-guide.pdf>

¹⁹⁰ <http://vancouver.ca/files/cov/culture-grants-infrastructure-guidelines.pdf>

¹⁹¹ <http://vancouver.ca/files/cov/Culture-Grants-2018-Operating-Information-guide.pdf>

¹⁹²

<http://canadacouncil.ca/research/research-library/2011/09/focus-on-disability-and-deaf-arts-in-canada>

memberships; the local audience seems to be engaging positively with ‘experiential’ events where music plays a key role; introducing flexible showtimes in different areas of the city could fit into a larger collaborative scheme and encourage audience development.

Goals: Increase accessibility for live music audiences in Vancouver in terms of age, abilities, sexual orientation, and cultural and ethnic backgrounds; support local media and venues that are driving and promoting diversity in the local music ecosystem; increase the sustainability of the local music ecosystem through audience development support programmes.

Actions:

6.8.1.1 Start a city-wide ‘friends of Vancouver music’ membership programme.

Originality of line-ups and audience loyalty appear to be connected issues in Vancouver according to interview data. A City-led, city-wide audience loyalty programme will assemble different organisations and venues with the purpose of increasing audience accessibility through a membership programme in a similar way to how classical sector organisations encourage membership. This paid membership scheme would have different price tiers that could be linked to more advantages and exclusive offers (eg private concerts, meet & greets, bar discounts, open rehearsals, etc).

Ideally, this scheme would be developed as a long-term alliance for the sustainability of the grassroots cultural venue ecosystem, and it would include an online media platform and newsletter to inform about cultural events happening in Vancouver from participating organisations. The membership programme would ultimately encourage venue bookers and curators to develop a collaborative programme so two or more similar events do not coincide on the same day.

BEST CASE EXAMPLE: CLUB TR3SC, CATALUNYA¹⁹³

The initiative TR3SC was developed in 2006 as a joint venture of the regional government’s Culture and Media Department and the Catalan Corporation of Audiovisual Media. It is a membership-based organisation (currently at 34,000 members) with free and paid plans that provide different access to content and benefits in the network, including discounts, access to exclusive events and presales, merchandise and its in-house events bulletin and magazine.

The platform is beneficial to the overall cultural ecosystem by appealing to audiences and cultural producers, it provides detailed information on quality programming and accessibility benefits to members and it serves as a promotional channel to encourage

¹⁹³ <https://www.tresc.cat/>

cultural consumption in the region. A basic membership costs €34 per year and includes permanent discounts to all advertised events and access to exclusive activities. The club provides a physical card to paid and free members that can be used to benefit from discounts when booking tickets online or in-person at participating venues.

6.8.1.2 Explore the possibility to develop a BC music quota for local radio stations and mainstream media.

Mainstream media outlets in Vancouver rarely feature local artists and music activities, according to interviewees and survey results. Regardless, existing programmes on the national level, such as the Canadian Content Development¹⁹⁴, have been praised by interviewees as key supporters of artist development in Canada. A content quota should be fulfilled as part of the requirements of the variable Canadian content quota that applies to different types of radio outlet¹⁹⁵ and other media. It would also be worth exploring the development of a provincial or local content development scheme, so mainstream media outlets and radio stations collaborate in the promotion of Vancouver artists, either directly by featuring them, or indirectly through funding artist support programmes.

6.8.1.3 Assess the development of an online show to promote local emerging artists.

The City of Vancouver should further support the local grassroots while promoting its status as a music-friendly city by developing a show that includes performances from emerging artists. The City should partner with Music BC and CBC to ensure maximum exposure, and agree the show's format (radio or TV) in advance, depending on the project resources and objectives. Its online availability would also support local artists by providing them with promotional materials (the performance recording, exposure) while raising awareness of the music of Vancouver on an international level. The show will ideally be recorded in different venues across the city and represent the musical diversity of the local sector, featuring original performances and interviews.

NB: Since the writing of this report there are talks of a possible television commission. Creative BC has also highlighted similar shows exist on CiTR, CJSF and community TV.

¹⁹⁴ https://crtc.gc.ca/eng/cancon/r_support.htm

¹⁹⁵ https://crtc.gc.ca/eng/cancon/r_cdn.htm

6.8.1.4 Introduce music programming as part of existing cultural events in Vancouver.

Creative and other specialist markets are attractive for residents and visitors, and can easily integrate music activities to add another layer of audience development. Vancouver's Eastside Flea¹⁹⁶ is an example of an event that would help to promote local music and increase the feeling of a 'music-friendly city', although it currently only includes live music on selected nights. Granville Island has opportunities to grow its daytime music offer. Night markets are one way of integrating street food and cultural options that attract people to different neighbours around town, and can easily feature local DJ nights and live music programming.

6.9 Local involvement

6.9.1 Recommendation 11: Support events, venues and organisations to generate community engagement through music.

Initiators: City of Vancouver; Vancouver Music Cities Committees; Local community stakeholders.

Background: The outdoor lifestyle is a fundamental part of the city and wellbeing culture in Vancouver, but the negative experience during the 'Stanley Cup riot' resulted in tightened regulations affecting special event licenses, ultimately limiting the spaces available to congregate in to consume local music, such as block parties and outdoor festivals. This confines most music events in Vancouver to privately-owned indoor venues during night-time, limiting daytime programming.

Music education representatives interviewed consider that increasing advocacy from their sector in the last 3 years is helping to gain support from parents and the community through district festivals. Artists and professionals in the music sector interviewed also highlighted local success stories of music organisations (eg Vancouver Chamber Choir) and festivals (eg Kitsilano Festival) that give back to communities through music by working with charities and the local grassroots. Overall, survey findings show the 'Sense of community' is among the highest-rated assets for heavy concert-goers (attending once a week or more often) and among the highest-rated challenges for infrequent concert-goers (attending once or twice per year or never).

Opportunities: The LGBTQ community has identified that the city has potential for further developing the local scene by easing permits and access to funding for minority groups;

¹⁹⁶ <http://www.eastsideflea.com/>

the Vancouver Greenest City 2020 objectives¹⁹⁷ promote the integration of local culture and music to build stronger communities and increase social inclusion; recent Special Event policy updates aim to streamline processes and requirements for ‘Community Special Events’¹⁹⁸; existing non-music events engage thousands of Vancouver inhabitants successfully despite sound complaints (eg fireworks) and can be used as best case examples.

Goals: Increase public acceptance and participation on the importance of music to the identity of Vancouver; improve co-existence and cooperation between music spaces and places, organisations, street performers and residents through music events; embed local music and live acts in a growing number of activities and places in Vancouver.

Actions:

6.9.1.1 Activate music spaces and places as daytime community assets.

Most venue owners and promoters interviewed agreed on the pressure created by liabilities and operating costs. To alleviate this, the City should explore how to encourage music spaces to provide alternative day uses for musicians and the community through in-kind benefits such as reduced business rates or more flexible licensing conditions. Alternative uses of venues should be aimed towards artists and professionals from a diversity of backgrounds, skills and abilities, by providing spaces to write music, rehearse and perform in non-operating hours. These uses could be encouraged depending on the needs and demands of the specific communities where they are located.

Additional support should be encouraged by giving space to host community meetings and other local events, providing space for health and wellness organisations and professionals to host events such as fitness classes.

6.9.1.2 Promote youth-organised concerts in civic centres and other community spaces.

Support should be directly provided by the City through youth engagement in community centres (eg Roundhouse Community Arts & Recreation Center¹⁹⁹), or developing an accessibility grant or policy to encourage the lease of spaces to young professionals. This action will help young aspiring music professionals to develop their skills and increase while increasing the number of all-ages music shows locally.

¹⁹⁷ <http://vancouver.ca/files/cov/Greenest-city-action-plan.pdf>

¹⁹⁸ <http://council.vancouver.ca/20161214/documents/cfsc13.pdf>

¹⁹⁹ <http://roundhouse.ca/>

This initiative could be combined with the production of a local radio programme to showcase Vancouver’s young and emerging talent on-stage and off-stage, such as the proposed in action 10.3.

6.9.1.3 Encourage information-sharing between local venues and festivals to promote year-round music activities in Vancouver.

Vancouver’s lively festival season should be expanded to create a consistent year-round music audience, with the collaboration of all stakeholders. Promoters and venues working together on the scheme would potentially develop a concert circuit business model in which artists could play several nights in small Vancouver venues at different times. The evaluation of this information-sharing, and a coordinated approach to programming shows, could evolve into creating a branded ‘Vancouver Live Music District’ that would have credibility among locals and visitors. The information should be featured in the tourist-oriented information developed as a suggestion in Recommendation 12, as well as the membership programme proposed in action 10.1.

6.10 Music Tourism

6.10.1 Recommendation 12: Create a ‘Vancouver Music’ tourism marketing campaign.

Initiators: Tourism Vancouver; Destination Development Department; Vancouver Music City Committees.

Background: The number of overnight visitors to Vancouver is increasing year on year, reaching 10.3million in 2017²⁰⁰. The Destination Development Department is in a position to be a key stakeholder in the development of the music sector because it has the amenities to fund music events and other opportunities that can contribute to Vancouver as a better destination overall. Vancouver’s festival season runs from July to September as more than half of events occur between those months²⁰¹. This peak period books out the majority of event resources available locally, including staff and technical equipment.

²⁰⁰

<https://www.tourismvancouver.com/media/corporate-communications/vancouver-tourism-industry-fast-facts/>

²⁰¹ <http://council.vancouver.ca/20171129/documents/pspc2-StaffPresentation.pdf>

Opportunities: The foreseeable ‘Destination Special Event Strategy’ (included in the updates to the Special Event License framework²⁰²) would encourage a more streamlined management and application process, while maintaining existing resourcing; Vancouver’s Tourism Master Plan²⁰³ envisions the development of infrastructures for music in the NE False Creek Sports and Entertainment District, and prioritises the visitor experience reflecting the city’s unique culture and diversity; successful international promotion of Vancouver music will encourage tourists to visit the city.

Actions:

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

Celebrating Vancouver as a music-friendly city involves a wide spectrum of stakeholders from the public and private sectors, as well as its citizens and the music ecosystem at large. Besides the engagement of tourism sector stakeholders through the Music Advisory Committee (currently including a Tourism Vancouver representative), partnerships with key tourism organisations to promote Vancouver as a music-friendly city will be fundamental to successfully targeting incoming visitors.

Private sector collaborations are recommended, such as providing Vancouver-bound airlines with special in-flight content such as local music playlists and music videos; engaging with existing tourist attractions and tourist ticket offers (eg Vancouver City Passport) to showcase local artists and offer information and discounts for music activities. Local established and emerging artists could also contribute to developing the creative materials for promoting the ‘sound of Vancouver’. Artists and bands outside of Vancouver should be brought into the promotional strategy to reinforce the city’s musical appeal to internationals.

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

Vancouver needs to share its music with all its visitors to consolidate the brand among locals and visitors. All tourism information materials should include music offer information and calendars. Tourism information desks should be able to deliver information on all music events taking place in the city, and its venue offer, as well as facilitate ticket purchases. These should be featured on the Tourism Vancouver website.

²⁰² Ibid.

²⁰³

https://res.cloudinary.com/simpleview/image/upload/v1/clients/vancouverbc/tourism_master_plan_64d161e3-d2b5-4aab-adf1-03a1fd8e1cc7.pdf

The availability of bespoke music promotional materials such as music on physical devices (vinyl, USB sticks and other merchandise) at selected tourist information points and the Tourism Vancouver offices would be beneficial to the campaign.

Tourism Vancouver's website²⁰⁴ could integrate a dedicated Vancouver Music site. It should include the top festivals, music tours, music shops, iconic venues, hidden gems and free music options available. Blog articles should include a curated playlist and a music and other inspirational places in the city. This could be an opportunity to develop artist-curated content into the strategy, in a similar way to how the best case example below lays out the content for the different cities featured.

BEST CASE EXAMPLE: LASTMINUTE.COM'S #MUSICMAKESYOU TRAVEL²⁰⁵

#MusicMakesYouTravel began as a music tourism marketing campaign developed by Lastminute.com in partnership with Spotify. The booking website identified a high demand of international travel for music festivals and developed a marketing campaign targeting festival tourists with helpful and inspiring content. The campaign microsite integrates into Lastminute's website and features 10 cities to click-through and find more information about the music available at the destination. Interactive maps allow users to discover the city's musical culture through curated playlists divided by city areas. Each city's site also features a section including interviews with local artists and venue information highlights which can be filtered by geographic area and genre preference. The platform also integrates flight and accommodation booking options.

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

Licensing and programming local music in city attractions would further integrate music into Vancouver's visitor experience. As a leading example, the Vancouver International Airport could also act as a music hub, welcoming visitors with music. The creation of a music strategy for YVR would ensure that actions are aligned with the airport's identity and available resources. Options could include providing busking/performing spaces at the arrival and departure areas, including tablets with information about music activities and local artists, and developing 'chillout' areas playing locally-recorded ambient electronic music where people can unwind.

²⁰⁴ <https://www.tourismvancouver.com/>

²⁰⁵ <http://music.lastminute.com/>

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Appendices

Appendix A

Table A.1 Canadian music strategies and initiatives

CANADIAN MUSIC STRATEGIES AND INITIATIVES			
Ontario	Toronto	Toronto music strategy 2016	https://www.toronto.ca/egdocs/mmis/2016/ed/bg rd/backgroundfile-90615.pdf
	Hamilton	Hamilton music strategy 2013	https://www.hamilton.ca/city-initiatives/strategies-actions/hamilton-music-strategy
	Ottawa City	Ottawa City music strategy 2018	http://ottawamic.com/wp-content/uploads/2018/04/2018_Music_Strategy_Final_EN_FINAL-s_659327.pdf
	London	London music strategy 2014	https://www.london.ca/About-London/culture/Documents/Appendix%20A%20-%20London%20Music%20Strategy.pdf
	Brantford	Music and Film Action plan - 2017 proposed plan to design a strategy for music and film	http://www.brantford.ca/pdfs/5.3%20CD2017-113%20Music%20and%20Film%20Action%20Plan%20-%20Copy.pdf
	British Columbia	Vancouver	Arts and Culture grants. CAD \$11million from Vancouver City and Vancouver Park Board designated to non-profit, cultural organisations, and artists
Alberta	Alberta	Music cities initiative for Alberta province 2014	http://nmc.ca/wp-content/uploads/2014/11/FertileGroundReport_FINAL-web.pdf

Quebec	Quebec	Grants for music by government agency, Conseil des arts et des lettres du Québec. Exchange programs, residencies, music production grants	https://www.calq.gouv.qc.ca/en/aide/discipline/music/
New Brunswick	New Brunswick	Music Industry Development Program for artists, professionals and businesses. Fosters development and growth through project investment and networks	https://www.musicnb.org/en/mnb-funding-programs/mid-overview
Nova Scotia	Nova Scotia	Music Sector strategy 2007	http://musicnovascotia.ca/sites/default/files/MSS_final.pdf
	Nova Scotia	Music Nova Scotia export strategy 2013	http://musicnovascotia.ca/sites/default/files/MNS_exportstrategy.execsummary.pdf
Newfoundland and Labrador	Newfoundland and Labrador	Music NL grants - for school touring, early years, community projects, travel, organisations, and individuals	http://www.musicnl.ca/opportunity/newfoundland-labrador-arts-council/
Prince Edward Island	Prince Edward Island	Music PEI funding in partnership with the PEI Provincial Government Department of Tourism & Culture	http://www.musicpei.com/funding/
New Brunswick Nova Scotia Newfoundland and Labrador Prince Edward Island	New Brunswick Nova Scotia Newfoundland and Labrador Prince Edward Island Cape Breton Island	Following 'Striking a new chord' report, agreement between Musique/Music NB, Music Nova Scotia, Music NL, Music PEI and Cape Breton Music Industry Cooperative to work with the ECMA, Music Canada, and Music Canada Live to create a joint regional strategy, the Atlantic Canadian Music Strategy	https://musiccanada.com/wp-content/uploads/2017/04/Striking-A-New-A-Chord.pdf

Appendix B

Table B.1 Associations, Choirs, Orchestras and Non-profits Vancouver

ASSOCIATIONS, CHOIRS, ORCHESTRAS AND PRESENTING ORGANIZATIONS VANCOUVER	
NAME	ADDRESS
ASSOCIATIONS	
Artspoints Rewards	N/A
Australia-New Zealand Association	3 W. 8th Ave., Vancouver
BC Alliance for Arts & Culture	938 Howe St, Vancouver, BC, V6Z 1N9
BC Association of Community Music Schools	N/A
BC Chinese Music Association	8495 Ontario St, Vancouver, BC, V5X 3E8
BC Creates	http://bccreates.com/
Canadian Music Centre	837 Davie St, Vancouver, BC, V6Z 1B7
Centre Culturel Francophone de Vancouver	1551 W 7th Ave, Vancouver, BC V6J 1S1, Canada
Coalition for Music Education in BC Society	N/A
Creative BC	7 W 6th Ave, Vancouver, BC, V5Y 1K2
DIGI BC	14 E 6th Ave, Vancouver, BC, V5T 2X2
Italian Cultural Centre Society	3075 Slocan Street, Vancouver
Music BC	938 Howe St #100 Vancouver, BC, V6Z 1N9
Music Heals	2245 W Broadway #301, Vancouver, BC, V6K 2E4
Positive Living Society of BC	803 East Hastings Street, Vancouver
SOCAN	1166 Alberni St #504, Vancouver, BC, V6E 3Z3
Urban Native Youth Association	119 W Pender St, Vancouver, BC, V6B 1S5

Vancouver Adapted Music Society	Admin Office: Suite 318 - 325 Carrall Street Vancouver, BC V6B 6E3 Recording Studio: 4255 Laurel Street Vancouver, BC V5Z 2G9, V6B 6E3
Vancouver Musicians Association	925 W 8th Ave, Vancouver, BC, V5Z 1E4
BUSINESS IMPROVEMENT ASSOCIATIONS	
Cambie Village BIA	378 - 3381 Cambie Street Vancouver, BC V5Z 4R3
Chinatown BIA	106 Keefer Street, Vancouver, BC, Canada V6A 1X4
Collingwood BIA	#300 - 3665 Kingsway, Vancouver, BC V5R 5W2
Commercial Drive BIA	1726 Commercial Dr, Vancouver, BC V5N 4A3
Downtown Vancouver Business Association	1130 W Pender St #325, Vancouver, BC, V6E 4A4
Dunbar Village BIA	N/A
Fraser Street BIA	465 - 6362 Fraser Street, Vancouver, B.C. V5W 0A1
Gastown BIA	318 Homer Street, Suite 210, Vancouver, BC, V6B 1E8
Hastings Crossing BIA	210-128 W Hastings St Vancouver, BC V6B 1G8
Hastings North BIA	2620 E Hastings St, Vancouver, BC V5K 1Z6
Kerrisdale BIA	Kerrisdale P.O. P.O. Box 18068 Vancouver, BC, V6M 4L3
Kitsilano BIA	202 - 1857 West 4th Ave Vancouver, BC V6J 1M4
Marpole BIA	N/A
Mount Pleasant BIA	3102 Main St, Vancouver, BC V5T 3G7
Point Grey BIA	1275 W 6th Ave #300, Vancouver, BC V6H 1A6

Robson BIA	1155 Robson St, Vancouver, BC V6E 1B5
South Granville BIA	210 - 1501 W Broadway, Vancouver, BC V6J 4Z6
Strathcona BIA	N/A
Victoria Drive BIA	5608 Victoria Dr, Vancouver, BC V5P 3W4
West Broadway BIA	N/A
West End BIA	1033 Davie St, Vancouver, BC V6E 4L2, Canada
Yaletown BIA	N/A
CHOIRS	
Afternoon Delight Choir	P.O. Box 4397, Terminal Main Vancouver, BC V6B 3Z8 Canada
CanSing Choirs	4370 Sophia St Vancouver, BC V5V 3V6 Canada
Chor Leoni	949 W 49th Ave Vancouver, British Columbia V5Z 2T1
City Soul Choir	1806 W15th Ave, Vancouver SW corner W15th & Burrard
Classic Rock Choir	N/A
Cyrlilka Slavic Chamber Choir	104-201 Alvin Narod Mews Vancouver, BC V6B 8P5
Elektra Women's Choir	949 W 49th Ave, Vancouver, BC
Enchor Choir	1490 Nanton Ave, Vancouver, BC V6H 2E2, Canada
Good Noise Vancouver Gospel Choir	PO Box 74725 Connaught PO Vancouver, BC V6K 0E4
Helena Choir (The)	Shaughnessy Heights United Church, Vancouver, 1550 West 33rd Avenue, Vancouver
High Spirits Choir	c/o 434 - 333 Wethersfield Drive, Vancouver BC V5X 4M9

Impromptu Rock Choir	Wise Hall, 1882 Adanac Street, Vancouver, V5L 4E5
Instant Rock Choir	N/A
Joyful Voice Community Choir	1130 Jervis St, Vancouver, BC V6E 2C7, Canada
Lions Gate Chorus	3403 East 49th Avenue (entrance through gym on East 48th) Vancouver, BC V5S 1M1
Little Flower Academy's Chamber Choir	4195 Alexandra Street, Vancouver, BC V6J 4C6
Marcus Mosley Chorale	1022 Nelson St, Vancouver, BC
Out In Harmony	442-1027 Davie Street Vancouver, BC V6E 4L2
Rain Coast Choir	https://www.raincoastchoir.com/
Sacred Harp Singers of Vancouver	Grandview Calvary Baptist Church, 1803 E 1st Av
Simple Gifts Community Choir	5600 Balaclava St Vancouver, BC V6N 1L1
Sing City Rock Choir	1130 Jervis St. Vancouver, British Columbia
Singing a Round	N/A
Sound Eclectic	1895 Venables St Vancouver, BC V5L 2H6, Canada
Spirit's Call Choir	N/A
St. James Anglican Church Choir	ST. JAMES' ANGLICAN CHURCH 303 East Cordova Street, Vancouver, BC, V6A 1L4
Top Line Vocal Collective	2208A Spruce St, Vancouver, BC V6H 2P3, Canada
Universal Gospel Choir	St. Margaret's Cedar Cottage, 1530 E. 22nd Ave. Vancouver, BC
Vancouver Bach Choir	304 - 3102 Main Street, Vancouver, BC V5T 3G7
Vancouver Cantata Singers	1254 W 7th Ave. Vancouver, BC V6H1B6
Vancouver Chamber Choir	1254 West 7th Avenue Vancouver, BC

Vancouver Children's Choir	690 Burrard St, Vancouver, BC V6C 2L1
Vancouver Choral Arts Society	https://vancouveryouthchoir.com/
Vancouver Men's Chorus	1270 Chestnut St, Vancouver, BC V6J 4R9, Canada
Vancouver Oratorio Choir	There are 2 rehearsal venues: a) VOS Chorus: 19Twenty Church, 1920 Argyle Drive, Vancouver and b) VOS Youth Singers: Garden Village Church, 4950 Barker Crescent, Burnaby. Mailing is at PO Box 43112 Rpo Richmond Centre, Richmond, BC V6Y 3Y3
Vancouver Pops Symphony & Choir	8881 Selkirk St, Vancouver, BC V6P 4J6
Vancouver Thunderbird Chorus	7284 Cypress St, Vancouver, BC V6P 5M3
Vancouver Welsh Men's Choir	215 E 17th Ave, Vancouver, BC V5V 1A6, Canada
Vancouver Youth Choir	PO Box 98813 The W PO Vancouver BC V6B 0G0
VOC Soul Gospel Choir	111 BROADWAY W, Vancouver, BC V5Y 1P3, Canada
West End Chamber Choir	West End Community Centre, 870 Denman Street, Vancouver BC
Willan Choir	Rehearsals: Auditorium, Building A, Broadway campus, 1155 E. Broadway. Vancouver Community College. Registration: Vancouver Community College' Music Office (Room 3205, South Building)
YVR Pop Choir	54 4th Ave E, Vancouver, BC V5T 1E8, Canada
ORCHESTRAS	
British Columbia Youth Chinese Orchestra	303-8495 Ontario Street (Kent Ave.), Vancouver, BC
Hard Rubber Orchestra	N/A
The Turning Point Ensemble	2227 West 13th Avenue, Vancouver
Vancouver Inter-Cultural Orchestra	Suite 12 - 719 East 31st Ave. Vancouver, BC

Vancouver Metropolitan Orchestra	239 - 2416 Main Street, Vancouver, BC V5T 3E2
Vancouver New Music String Orchestra	837 Davie St, Vancouver, BC V6Z 1B7, Canada
Vancouver Philharmonic Orchestra	P.O. Box 27503 Oakridge Postal Outlet Vancouver, B.C. V5Z 4M4
Vancouver Symphony Orchestra	843 Seymour St #500, Vancouver, BC
Vancouver Youth Symphony Orchestra	3214 W. 10th Avenue Vancouver, BC V6K 2L2
PRESENTING ORGANIZATIONS	
367 Productions	N/A
Accordion Noir Society	N/A
Amexem Cultural Society	N/A
Asian-Canadian Special Events Association	N/A
Barking Sphinx Performance Society	#410 - 111 West Hastings Street
Borealis String Quartet	N/A
Caravan World Rhythms	1917 W 4th Ave, Vancouver, BC V6J 1M7
Early Music Vancouver	1254 West 7th Avenue Vancouver, BC Canada V6H 1B6
Emily Carr String Quartet	N/A
Flamenco Rosario	N/A
Indian Summer Arts Society	1880 Fir St #201, Vancouver, BC V6J 3B1, Canada
Inventor Live	467 Powell St, Vancouver
Latincouver Cultural & Business Society	68 Water St #406, Vancouver, BC V6B 1A4
Metalocalypstick Fest Foundation	8430 Aqua Drive, Vancouver
Music In the Morning	2480 Spruce St, Vancouver, BC V6H 2P6, Canada
Musica Intima	204 - 3102 Main Street Vancouver, BC, V5T 3G7 Canada

New Forms Media Society	16 E 6th Ave, Vancouver, BC V5T 1J4
NOW Ensemble	N/A
Pacific Bluegrass & Old-Time Music Society	N/A
Powell Street Festival Society	#410-111 West Hastings St, Vancouver
Redshift New Music	#107 - 630 Roche Point Drive, North Vancouver, BC V7H 3A1
Secret Lantern Society	3 - 717 West 8th Avenue, Vancouver
Standing Wave	111 West Hastings Street, Suite 410 Vancouver BC V6B 1H4 Canada
The Little Chamber Music Series That Could Society	1568 Grant St., Vancouver
The Vancouver Fireworks Festival Society	308-611 Alexander Street, Vancouver
Turning Point Ensemble	2227 West 13th Avenue, Vancouver BC V6K 2S4
Uzume Taiko Drum Group	1254 Frances Street Vancouver, BC V6A 1Z5 Canada
Vancouver Academy of Music Choirs	1270 Chestnut Street Vancouver, BC V6J 4R9 • Canada
Vancouver Chinese Instrumental Music	Suite 410 - 111 West Hastings Street Vancouver, BC V6B 1H4 Canada
Vancouver Chopin	# 400 - 601 West Broadway Avenue, Vancouver, B.C. V5Z 4C2 Canada
Vancouver Electronic Ensemble	N/A
Vetta Chamber Music & Recital	PO Box 19148 2302 4th Ave Vancouver, BC V6K 4R8
West Coast Symphony	N/A

Western Front New Music	303 East 8th Ave Vancouver, BC Canada V5T 1S1
World Rhythms for Youth Society	851 E. 13th Ave Vancouver, BC V5T 2L4

Table B.2 Closed venues Vancouver

VENUE NAME	ADDRESS
The Au Bar	674 Seymour St BC V6B 3K3
Richards on Richards	1036 Richards St Vancouver
The Big Bamboo	1236 Broadway W Vancouver
Graceland	1250 Richards Street Vancouver
Electric Owl	926 Main St, Vancouver, BC V6A 2W1
Purple Onion	15 Water St, Vancouver, BC V6B 1A1
Level 5	5th floor, 595 Horby Street Vancouver
The Cave	626 Hornby St Vancouver
Railway Club	579 Dunsmuir St, Vancouver, BC V6B 1Y4
The Cellar Jazz Club	3611 Broadway W BC V6R 2B8
Starfish Room	1055 Homer St Vancouver
Gandy Dancer	1222 Hamilton St Vancouver
Waldorf Hotel	1489 E Hastings St Vancouver BC V5L 1S4
Luv-A-Fair	1275 Seymour Street Vancouver
The Town Pump	66 Water St Vancouver

Table B.3 Music Festivals Vancouver

FESTIVAL NAME	ADDRESS	WEB LINK
African Descent Festival	739 Gore Ave #202, Vancouver, BC V6A 2Z9	
Albatross Festival	188 N Renfrew St Vancouver, BC, V5K 3N8	https://www.facebook.com/AlbMusicFest/
Ambelside Live	2088-1177 West Hasting Street	http://amblesidelive.com/about-us/
Blueridge Chamber Music	823 Seymour St Vancouver, BC V6B 3L4	
Break Out Festival	PNE Amphitheatre. East, 2901 E Hastings St, Vancouver, BC, Canada	https://www.breakout-festival.com/
Canada Day Celebrations	Canada Place, Vancouver	
Carnaval De Sol	Concord Pacific Place, 88 Pacific Boulevard. Vancouver, BC V6Z 2R6	https://vancouverbestplaces.com/carnaval-del-sol/
Coastal Jazz and Blues Society	295 W 7th Ave, Vancouver, BC	https://www.coastaljazz.ca/
Contact Festival (BC)	BC Place - Vancouver, BC	http://contact-festival.com/
Early Music Vancouver	1254 W 7th Ave, Vancouver, BC V6H 1B6, Canada	
Festival African Heritage Music And Dance	N/A	
Indian Summer Festival	1880 Fir St #201, Vancouver, BC	https://www.indiansummerfest.ca/

Khatsahlano Music & Arts Festival	1857 W 4th Ave (5,335.99 mi) Vancouver, British Columbia V6J1M4	Khatsahlano.com
LunarFest		https://lunarfest.org/
Modulus	Location Last Year: 685 Great Northern Way Vancouver, BC Administrative Office: 16 E 6th Ave, Vancouver, BC V5T 1J4	http://www.musiconmain.ca/
Music Waste Festival	Map of locations: https://www.google.com/maps/d/u/0/viewer?mid=1s6g-dg_AMIZ_CUHQC7ayvTt-VJv9FvKcC&ll=49.265673214164046%2C-123.07977295&z=14	Musicwaste.com
New Forms Festival	111 W Hastings St #410, Vancouver, BC	http://newformsmediasociety.org/nff-17/
New Years Eve	Canada Place, Vancouver	
PNE Concert Series	2901 E Hastings St. Vancouver, BC V5K 5J1, Canada	PNE.com
Powell Street Festival Society	Royal Athletic Park, 1014 Caledonia Ave Victoria, BC	www.powellstreetfestival.com/
Push Festival	750 Hamilton St #110, Vancouver, BC V6B 0E9, Canada	
Red Truck Concert Series	295 E 1st Ave, Vancouver, BC V5T 1A7, Canada	https://www.redtruckbeer.com/events/
Shore Festival	English Bay, Vancouver	Hondacelebrationoflight.com
Skookum Festival	Stanley Park, Vancouver	skookumfestival.com

Taiwan Fest	Various Venues: https://fullcircle.ca/wp-content/uploads/2018/02/TSF18_ProgramGuide_2018.pdf	https://taiwanfest.ca/
Talking Stick Festival	Jericho Beach Park 3941 Point Grey Rd, Vancouver, BC	https://fullcircle.ca/festival/about/
Theatre Under the Stars	610 Pipeline Rd, Vancouver, BC V6G 3E2, Canada	
Vancouver China Town Festival	100 Keefer St, Vancouver, BC V6A 1X4, Canada	
Vancouver Craft Beer Week	PNE GROUNDS, VANCOUVER, BC	
Vancouver Folk Music Festival	308-877 Hastings Street Vancouver, BC	http://thefestival.bc.ca/
Vancouver Fringe Festival	Mailing address: Box 203 - 1398 Cartwright St. Vancouver, BC, V6H 3R8	
Vancouver Indigenous Media Arts Festival	#210 - 111 West Hastings Street Vancouver, BC	https://www.facebook.com/VIMAF/
Vancouver International Bhangra Celebration Society	295 West 7th Avenue Vancouver, BC	https://www.vibc.org/about
Vancouver International Film Festival	1181 Seymour St Vancouver, BC V6B 3M7	
Vancouver Jazz Festival	Multiple venues	https://www.coastaljazz.ca/
Vancouver Thai Festival	750 Hornby St., Vancouver, BC V6Z 2H7, Canada	https://vancouverbestplaces.com/vancouver-thai-festival/
Vancouver World Music Festival		http://www.worldmusicfest.ca/
Westward Music Festival	918 Granville Street Vancouver, British Columbia V6Z 1L2	http://westwardfest.com/

Table B.4 Music Industry Businesses Vancouver

NAME	ADDRESS
MANAGEMENT	
Big Smoke	N/A
Bruce Allen Talent	425 Carrall St, Vancouver, BC
Core Music Agency	#300, 328 West Hastings Street, Vancouver, BC V6B 1K6, Canada
Divine Industries	1001 W Broadway #101, Vancouver, BC V6H 4E4, Canada
Hidden City	2006 - 1330 Harwood St Vancouver BC V6E1S8
Hoax Management	Suite 11 - 156 E. 8Th Avenue, Vancouver
Launchcode Productions	389 east Broadway unit 6 V5T 1W6
Macklam Feldman Management	#200 - 1505 West 2nd Avenue Vancouver, BC
Membran Entertainment Group	N/A
Netzwerk Music Group	575 W 8th Ave, Vancouver, BC
Phase Music Management	N/A
PYL Records Corp.	N/A
Raincoast Music	N/A
Red Bud Music	407-2268 Redbud Lane, Vancouver
Simkin Artist Management	795 Cordova St E, Vancouver, BC V6A 1M2
Tiny Kingdom	https://www.tinykingdommusic.com/
Tonic Records	230C - 196 West 3rd Ave Vancouver, BC V5Y 1E9
Watchdog Management	N/A
WenerHouseMusic INC	6195 St Clair Place, Vancouver

XOXO Entertainment Corp.	475 Granville St. Vancouver, British Columbia V6C 1T1
PRODUCTION COMPANIES	
2track Entertainment Inc.	1395 Frances St, Vancouver, BC V5L 1Z1, Canada
AV Strategies	1295 Napier St, Vancouver, BC
Bailey Way Entertainment	N/A
Black Hen Music	Box 95105 Kingsgate Rpo
Born To Fly Productions Inc.	N/A
Eric Mosher.com	N/A
NYG Productions	176 Salsbury Drive, Vancouver, BC V5L 3Y9
Opus 59 Films Inc.	N/A
Promosa	1265 Powell St, Vancouver, BC
Reliant Music	707 - 1212 Howe Street
Republic Digital Inc.	212 - 309 Cordova St. West
Riggitt	965 Great Northern Way, Vancouver, BC
Savage Arts Pictures	N/A
SCALPA Productions Ltd.	1211 Melville Street #2704, Vancouver
Sessionwire Communications Inc.	Suite 2310 - 1177 West Hastings St. Vancouver, BC V6E 2K3
Soundtrade Productions	#3004-1239 West Georgia Street, Vancouver
Synergize Music Productions	N/A
Tyz Productions	9-925 Victoria Drive, Vancouver
XOXO Studios	N/A
PROMOTERS	

Apocalypse Sunrise Productions	N/A
BrandLive	120 W 3rd Ave unit 201, Vancouver, BC
CMHL Enterprises	V6R 3M2 VANCOUVER, CANADA
Fair Wend Entertainment Services	Suite #3, Creativ Recording Studios 220-340 Brooksbank Ave North Vancouver, BC, V7J 2C1
Flygirl Productions	4504 Georgia st V5c2v3
Granville Entertainment Group	183 Keefer Place, Vancouver
John Donnelly and Associates	9021 Shaughnessy St, Vancouver, BC, V6P 6R9
Live Nation	56 E 2nd Ave #500, Vancouver, BC
Locals Lounge	520 E 19th Ave Vancouver BC V5V 1J9
ModMay Promotions	#10, 1665 Cotton Drive, Vancouver, BC V5L 3V3
MRG Group	918 Granville St, Vancouver, BC
Rock.It Boy Entertainment	N/A
The Invisible Orange	101 - 2436 West 2nd Avenue. Vancouver BC V6K1J6
Timbre	200 24 West 4th Avenue, Vancouver, BC
The Western Front	303 East 8Th Avenue, Vancouver
This Is Blueprint	#300 - 415 West Cordova St. Vancouver, B.C. V6B 1E5
POST-PRODUCTION	
DBC	1256 E 6th Ave #1, Vancouver, BC
GGRP	201 W 7th Ave, Vancouver, BC
Koko	66 W 8th Ave, Vancouver, BC
Post Modern	1722 W 2nd Ave, Vancouver, BC

Sound Kitchen	178 E 32nd Ave, Vancouver, BC
Wave	1682 W 7th Ave #100, Vancouver, BC
RECORD LABELS	
604 Records	101-1001 WEST BROADWAY UNIT 165
1080p	N/A
Ache Records	N/A
Big In Japan Recordings	N/A
Boompa Records	230C - 196 West 3rd Ave. Vancouver, BC Canada V5Y 1E9
Boutique Empire	N/A
Business Class Records	238 E 2nd Ave, Vancouver, BC V5T 1B7
CME L8R Productions	N/A
Dash Deep Records	7428 Southwynde Avenue, Vancouver
Deepen Sound Records	3463 156A Street, Vancouver
Drip Audio	N/A
Endearing Records	N/A
Genero	4438 West 10th Ave., Suite #184 Vancouver, BC, Canada V6R 4R8
Gopher Productions Inc	1899 Cypress Street, Vancouver
Hastings Records	N/A
Hockey Dad Records	2-823 Victoria Drive, Vancouver
Hosehead Records	N/A
Hotbed	N/A
Imagine Create Music Inc.	101-1001 West Broadway, Unit 182 Vancouver, BC V6H 4E4

JumpAttack Records	1839 Franklin Street, Vancouver BC
Kitty on Fire Records Ltd.	278 East 1st Ave., Vancouver
Light Organ Records	704-207 West Hastings Street Vancouver, BC V6B 1H7
Mint Records Inc.	N/A
Monstercat Records	N/A
Mood Hut	380 Railway street Vancouver, British Columbia
MTCS	N/A
Nevado Music Inc.	N/A
Nettwerk Records	575 West 8th Ave., 5th Floor, Vancouver, BC V5Z 0C4
Nordic Trax Entertainment Inc	Suite A-34 Powell Street, Vancouver
Seeking Blue Records	N/A
Sensing Waves	N/A
Songlines Recordings	3036 6Th Avenue W, Vancouver
Tonic Records	230 C - 196 West 3rd Ave. Vancouver, BC Canada V5Y 1E9
We Have Friends' Music	Suite 410 - 1010 Chilco Street, Vancouver
Westwood Recordings	N/A
Zone Records	N/A
Zulu Records	1972 West 4Th Avenue

Table B.5 Other Music Industry Businesses Vancouver

NAME	BUSINESS TYPE	ADDRESS	WEB LINK
542 Entertainment Inc.	Booking	N/A	https://www.facebook.com/542entertainment/
A-B-A-C-A Music Publishing INC.	Licensing, Publishing, Label	N/A	http://www.nortman.ca/abaca/
Battle Axe Music	Management, Music Publishing/Licensing, Education	N/A	
Bob Baker Creative Connections	Other	N/A	http://www.bobbaakercreativeconnections.com/
Community Tree Music	Other	N/A	
DMCL	Financial	1140 W Pender St #1500-1700, Vancouver, BC	http://www.dmcl.ca/
Frontside	Music PR	3381 Cambie St, Vancouver, BC	www.frontsidegroup.com/
Galactic Entertainment	Events/Rental	1610 Langan Ave, Port Coquitlam, BC	http://www.galactic.ca/rentals/
Hamilton's Music Publishing	Publishing	2569 Ancaster Cres Vancouver BC V5P2N6	
How Weird Productions INC	Other	1056 E. 14th Avenue Vancouver B.C. V5T 2N9	
Hyvetown Music Inc.	Publishing	1250 Homer St, Vancouver, BC V6B 1C6, Canada	http://hyvetown.com/
Infinite Events Corp.	Events/Rental	1102 - 1833 Crowe St, Vancouver	
Jive Communications	Marketing	N/A	

Little Dog Creative Consulting	Other	N/A	
Paquin Artists Agency	Booking Agency	230C-196 West 3rd Avenue Vancouver, BC	
Ritual Media Inc.	Publishing	2A - 34 Powell St, Vancouver, BC V6A 1E7, Canada	https://www.ritualmusic.com/
Secret Study Projects	Events/ Media/ Creative	98 W 37th Ave V5Y 2N1 Vancouver	https://www.secretstudy.ca/
Siegel Entertainment	Events	1529 W 6th Ave #108, Vancouver, BC	http://www.siegelent.com/
SILO Entertainment	Media/ Rights	N/A	http://www.siloenertainment.com/
The District	Events/Media	N/A	http://www.edmstrict.com/
The Feldman Agency	Booking Agency	1505 W 2nd Ave, Vancouver, BC, V6J 5C5	https://feldman-agency.com/
Yaletown FM	Financial	#505 - 1250 Homer Street Vancouver, BC	http://yaletownfm.com/

Table B.6 Music Schools

NAME	ADDRESS
Academy Of Music	1460 49th Ave W, Vancouver
Arbutus Music Academy Co-Op	B5 - 4189 Yew Street, Vancouver
Bravo Music	1028 W 67th Ave, Vancouver
British Columbia Conservatory of Music - School	109 E 40th Ave, Vancouver
Capri Music Lessons	291 E 33rd Ave, Vancouver
Colourstrings Conservatory of Music	129 E 8th Ave, Vancouver
Cultural Academy of Music: Piano, Theory, Violin Lessons	1819 Dunbar St, Vancouver

Denoni's Academy of Music	201-, 2425 W 4th Ave, Vancouver
Drum Lessons Vancouver	211, 237 E 4th Ave, Vancouver
Drum Mama Studios Vancouver Hand Drumming Lessons	W 43rd Ave, Vancouver
Guitar Lessons Vancouver	336 E 1st Ave, Vancouver
Jean Lyons School of Music	73 E 7th Ave, Vancouver
Music Together at JCC - Staccato Studios	950 W 41st Ave, Vancouver
Native Education College	237 5th Ave E, Vancouver, BC
Nimbus School Of Recording & Media	238 E 2nd Ave, Vancouver
Oakridge Music Studios	497 W 40th Ave, Vancouver
Organic Music Lessons	1890 Pandora St Studio #2, Vancouver
Pacific Audio Visual Institute	34 W 8th Ave, Vancouver
Resound School of Music	1090 Homer St #300, Vancouver
Saint James Music Academy	303 E Cordova St, Vancouver
Sarah McLachlan School of Music	138 E 7th Ave, Vancouver
School of Remix	49 Dunlevy Ave #240, Vancouver
Shaughnessy Heights Music School	1550 W 33rd Ave, Vancouver
Showcase Music Academy	1128 W Broadway suite 2, Vancouver
Singing Piano Guitar Music Theory Vancouver Creative Class	1380 Jervis St, Vancouver
Song of Stars School Of Music	2P7, 2715 W 12th Ave, Vancouver
Studio Cloud 30	2208A Spruce St, Vancouver
Vancouver Academy of Music	1270 Chestnut St, Vancouver
Vancouver Central School of Music	9 E Broadway, Vancouver
Vancouver Community College, School of Music	1155 East Broadway, Vancouver, BC V5T 4V5
Vancouver Guitar School	33 W 8th Ave, Vancouver

Violin Lessons with Nataly Pogrebetsky	14/597 S-W Marine Dr., Vancouver
Vitta Academy Music & Arts	2688 Shell Rd, Richmond
VSO School of Music	843 Seymour St, Vancouver
West Point Grey School of Music	202, 75 West Broadway, Vancouver
Wired Electronic Music Workshops	1715 Cook St #206, Vancouver
Wesley Music & Arts Academy	1215 W Broadway, Vancouver
West Side Music Together	Kerrisdale Community Centre, 5851 West Boulevard, Vancouver
University of British Columbia, School of Music	2125 Main Mall Vancouver, BC Canada V6T 1Z4

Table B.7 Music Venues Vancouver

VENUE NAME	ADDRESS
GRASSROOTS/LIVE MUSIC FOCUS VENUES	
China Cloud	524 Main St, Vancouver, BC
Guilt and Co.	1 Alexander St, Vancouver, BC
Malkin Bowl	610 Pipeline Rd. Vancouver BC
Merge	Clark Dr. and Powell St., Vancouver, British Columbia
The Biltmore	2755 Prince Edward St, Vancouver, BC V5T 0B5
The Commodore	868 Granville St, Vancouver, BC
The Fox Cabaret	2321 Main St, Vancouver, BC V5T 3C9
The Rickshaw	254 E Hastings St, Vancouver, BC V6A 1P1
The Rogue Folk Club	3214 W 10th Ave, Vancouver, BC V6K 2L2, Canada
The Toast Collective	648 Kingsway Vancouver

Wise Hall	1882 Adanac St, Vancouver, BC V5L 2E2
ARENAS	
BC Place Stadium	777 Pacific Blvd Vancouver V6B 4Y8
Deer Lake Park	6450 Deer Lake Blvd. Burnaby BC
Doug Mitchell Thunderbird Sports Centre	6066 Thunderbird Blvd. Vancouver BC
Nat Bailey Stadium	4601 Ontario St Vancouver, BC, Canada
Pacific Coliseum	100 N Renfrew St, Vancouver, BC V5K 4W3, Canada
PNE Forum	2901 E Hastings St, Vancouver, BC V5K 5J1
Rogers Arena	800 Griffiths Way Vancouver V6B 6G1
MULTI ARTS VENUES AND THEATRES	
Chan Centre for the Performing Arts	6265 Crescent Rd, Vancouver, BC
Murray Adaskin Salon	837 Davie St, Vancouver, BC V6Z 1B7, Canada
Performance Works	1218 Cartwright St. Vancouver V6H 3R8
Pyatt Hall	843 Seymour St. Vancouver V6B 3L4
Queen Elizabeth Theatre	630 Hamilton St, Vancouver, BC
Revelstoke Performing Arts Centre	1007 Vernon Avenue, Revelstoke, BC
Rio Theatre	1660 E Broadway, Vancouver, BC
SFU Woodwards	149 West Hastings Street Vancouver, BC
The Annex	823 Seymour Street Vancouver V6B 3L4
The Centre in Vancouver	777 Homer St. Vancouver V6B 2W1
The Ironworks	235 Alexander Street Vancouver V6A1C2
The Orpheum	601 Smithe St Vancouver V6Z 1K3
Vancouver Playhouse	600 Hamilton St, Vancouver, BC V6B 2P1, Canada

Vogue Theatre	918 Granville St, Vancouver, BC V6Z 1L2
BARS, RESTAURANTS WITH LIVE MUSIC	
Astoria Hastings	769 E Hastings St, Vancouver, BC V6A 1R3
Blarney Stone	216 Carrall Street
Cafe Deux Soleils	2096 Commercial Drive Vancouver V5N 4B2
Cottage Bistro	4470 Main Street Vancouver V5V 3R3
Frankie's Jazz Club	755 Beatty Street Vancouver V6B 2M4
Hindenburg	23 West Cordova Street Vancouver V6B 1C7
Lanalou's	362 Powell Street Vancouver V6A 1G4
Libra Room	1608 Commercial Drive, Vancouver, BC V5L 3Y4
London Public House	700 Main St., Vancouver
Mahony & Sons Stamps Landing (False Creek)	601 Stamps Landing Vancouver
Pat's Pub	403 E Hastings St, Vancouver, BC
Prohibition	801 W Georgia St, Vancouver, BC
Pub 340	340 Cambie St Vancouver V6B 2N4
SBC Restaurant	109 East Hastings Vancouver V6A 1N5
Sylvia Hotel	1154 Gilford Street Vancouver V6G 2P6
The American	926 Main St, Vancouver, BC V6A 2W1
The Brandiz	122 Hastings St E, Vancouver BC V6A 1N4
The Brighton Pub	2471 East Hastings St Vancouver V5K 1Y8
The Cobalt	917 Main Street Vancouver V6A 2V8
The Fairview Pub	898 West Broadway, Vancouver, BC V5Z 1J8
The Heatley	696 E Hastings St Vancouver V6A 1R1
The Lido	518 E Broadway, Vancouver, BC V5T 1X4

The Main	4210 Main St Vancouver, BC V5V 3P9 Canada
The Portside Pub	7 Alexander St, Vancouver BC, V6A 1E9
The Princeton Pub & Grill	1901 Powell Street Vancouver V5L 1J2
The Wolf and Hound	3617 West Broadway Vancouver V6R 2B8
NIGHT CLUBS	
1181	1181 Davie St, Vancouver
Aura nightclub	1180 Granville St, Vancouver
Backstage Lounge	1585 Johnston St, Vancouver
Bar None Nightclub	1222 Hamilton St, Vancouver
Blue Crest	1625-1685 W 13th Ave, Vancouver
Brandis Show Lounge	5th floor, 595 Hornby Street, Vancouver
Bust Loose	938 Howe St, Vancouver
Cabana Lounge	1159 Granville St, Vancouver
Celebrities Nightclub	1022 Davie St, Vancouver
Ceroc Vancouver	215 E 17th Ave, Vancouver
Cinema Public House	901 Granville St, Vancouver
Clough Club	212 Abbott St, Vancouver
Club 816 The Basement	816 Granville St, Vancouver
Dominion Lounge The	686 W Hastings St, Vancouver
Drai's Vancouver	1161 W Georgia St, Vancouver
Fivesixty	560 Seymour St, Vancouver
Fortune Sound Club	147 E Pender St, Vancouver
Fox Cabaret	2321 Main St, Vancouver
Funky Winker Beans	37 W Hastings St, Vancouver

Gordo	1137 Marinaside Crescent, Vancouver, BC V6Z 2Y3 Marinaside Crescent, Vancouver
Gorg-o-mish	695 Smithe St, Vancouver, BC V6B 2C9
Granville Room	957 Granville St, Vancouver
Harbour Event Centre	750 Pacific Blvd, Vancouver
Hybridity	1024 Davie St, Vancouver, BC V6E 1M3
index	1305 Powell St, Vancouver
Just Dance	2114 W 4th Ave, Vancouver
MIA Nightclub	350 Water St, Vancouver
Night Vision Toastmasters Club	1440 W 12th Ave, Vancouver
No 5 Orange	205 Main St, Vancouver
Numbers Cabaret	1042 Davie St, Vancouver
Opus Bar	350 Davie St, Vancouver
Pierre's Champagne Lounge	1030 Hamilton St, Vancouver
Playhouse Nightclub Vancouver	1240 Thurlow St, Vancouver
Prive Nightclub	750 Pacific Blvd, Vancouver
Republic	958 Granville St, Vancouver
Serotonin Afterhours Club	1058 Granville St, Vancouver
Studio Lounge & Nightclub	919 Granville St, Vancouver
Tavern at The New Oxford	1141 Hamilton St, Vancouver
The 500 Club	800 Griffiths Way, Vancouver
The Anza Club	3 W 8th Ave, Vancouver
The Belmont Bar	1006 Granville St, Vancouver
The Bimini Public House	2010 W 4th Ave, Vancouver
The Bourbon	50 W Cordova St, Vancouver

the Comedy MIX	1015 Burrard St, Vancouver
The Granville Strip	1050 Granville St, Vancouver
The Metropole Community Pub	320 Abbott St, Vancouver
The Narrow Lounge	1898 Main St, Vancouver
The Odyssey Bar & Nightclub	686 W Hastings St, Vancouver
The Penthouse Night Club	1019 Seymour St, Vancouver
The Red Room	398 Richards St. Vancouver V6B 4Y2
The Roxy Cabaret	932 Granville St, Vancouver
The Trump Champagne Lounge	1161 W Georgia St, Vancouver
The Yale Saloon	1300 Granville St, Vancouver
Thor's Palace	E. 13th Avenue Vancouver
Tokyo Lounge	1050 Alberni St, Vancouver
Twelve West	1219 Granville St, Vancouver
Venue Nightclub	881 Granville St, Vancouver
Xy	1216 Bute Street Vancouver V6E 1Z8
OCCASIONAL VENUES (GALLERIES, WAREHOUSES, ETC.)	
333 Clark	333 Clark Vancouver
Brix Studio	102 - 211 Columbia Street
CBC Studio 1 Broadcasting Centre	700 Hamilton St
Chapel Arts	304 Dunlevy St Vancouver BC V6A 3A6
Korean Hall	1320 E Hastings St, Vancouver, BC
Mubi Studio	308, 611 Alexander St Vancouver, BC
Open Studios	252 East 1st Avenue Vancouver V5T4V4
Red Gate	855 E Hastings St, Vancouver, BC

Renegade Broadway Studios	3030 E Broadway
St. Andrew's Wesley United Church	1022 Nelson Street Vancouver V6E 4S7
St. James Hall	3214 W. 10th Vancouver BC
Studio Vostok	246 Keefer St, Vancouver, BC V6A 1X6
Stylus Records	291 E 2nd Vancouver
The Black Lab	
The Matador	3017 Copley Street
The Woods Studio	7 W 2nd Ave
Unity of Vancouver	5840 Oak Street Vancouver V6M 4M5

Table B.8 Radio Stations Vancouver

NAME	ADDRESS
93.7 JRfm	1401 West 8th Avenue #300, Vancouver
102.7 The Peak	1401 W 8th Ave #300, Vancouver
103.5 QMFM	969 Robson Street #500, Vancouver
Bell Media	969 Robson Street, Vancouver
CBC Vancouver	700 Hamilton St, Vancouver
CITR	LL500 6133 University Blvd. Vancouver, BC V6T 1Z1
CJSF	Simon Fraser University Burnaby, B.C. V5A 1S6
CKST	380 W 2nd Ave, Vancouver
Cfun	380 W 2nd Ave, Vancouver
Classic Rock 101-Cfmi	700 W Georgia St #2000, Vancouver
Jack 96.9	2440 Ash St, Vancouver
KiSS Radio	2440 Ash St, Vancouver

NFM Radio	Rue Notre Dame, Vancouver
News 1130	2440 Ash St, Vancouver
Radio Emily	1399 Johnston St, Vancouver
Team 1410 AM	380 W 2nd Ave, Vancouver
TSN 1040 TSN 1410	969 Robson Street #500, Vancouver
Vancouver Co-op Radio CFRO 100.5 FM	370 Columbia St, Vancouver
Virgin Radio	969 Robson St, Vancouver

Table B.9 Media Companies Vancouver

NAME	ADDRESS	WEB LINK
Beatroute Magazine	202-2405 Hastings St. E Vancouver, BC	http://beatroute.ca/
Broadband TV	1205 Melville St, Vancouver, BC	https://www.bbtv.com/
CBC Music	700 Hamilton St Vancouver, BC	https://www.cbcmusic.ca/
CITR	LL500 6133 University Blvd. Vancouver, BC	http://www.citr.ca/
DailyHive	Mailing Address: 400-1008 Homer Street Vancouver, BC	http://dailyhive.com/vancouver
Discorder Magazine	LL500 6133 University Blvd. Vancouver, BC	http://www.citr.ca/discorder/
Fritz Media	196 W 3rd Ave #230C, Vancouver, BC	http://www.fritzmedia.ca/
Georgia Straight	Contact Address: 1635 West Broadway Vancouver B.C.	https://www.straight.com/
JR Country Vancouver	1401 W 8th Ave #300 Vancouver, BC	http://www.jrfm.com/

Jive Communications	138 E 7th Ave #100, Vancouver, BC	http://www.jiveprdigital.com/
Rennie Marketing	51 East Pender Street, Vancouver, BC	https://rennie.com//
Scout Magazine	Mailing Address: Scout Magazine PO Box 88401 Chinatown Vancouver, BC	http://scoutmagazine.ca/
Vancouver Sun	2985 Virtual Way #400, Vancouver, BC	http://vancouver.sun.com/

Table B.10 Record Stores and Instrument Manufacturers Vancouver

NAME	ADDRESS
RECORD STORES	
Audiophile	2016 Commercial Dr, Vancouver
Beat Street Records	439 W Hastings St, Vancouver
Best Buy	8133 Ontario St, Vancouver
Best Buy	798 Granville Bridge #200, Vancouver
Bone Rattle	2012 Commercial Dr, Vancouver, BC
Dandelion Records & Emporium	2442 Main St, Vancouver
Highlife Records & Music	1317 Commercial Dr, Vancouver
hmv	1148 Robson St, Vancouver
Lightning Audio	178 E Pender St, Vancouver
Lotusland Electronics & Music	2660 Alma St, Vancouver
Neptoon Records	3561 Main St, Vancouver
Noize To Go Records	243 Union St, Vancouver
Red Cat Records	4332 Main St, Vancouver

Remix Records	1228 Granville St, Vancouver
Rufus	2621 Alma St, Vancouver, BC
Selectors' Records	8 E Pender St, Vancouver
Sikora's Classical Records	432 W Hastings St, Vancouver
Stylus Records	291 E 2nd Ave unit 99, Vancouver
Tapestry Music	3607 W Broadway, Vancouver, BC
Vinyl Envy	1717 Quadra Street Victoria, British Columbia
vinyl records	321 W Hastings St, Vancouver
Zulu Records	1972 W 4th Ave, Vancouver
INSTRUMENT MANUFACTURERS	
Basone Guitar Shop	V5T 1H4
Coloma Guitars	V5T 3B7
Exile	3730 Main St, Vancouver, BC
Gandharva Loka World Music Instruments	V6H 3S2
Geza Burghardt	1645 Duranleau St, Vancouver, BC
Halcyon Guitars	East Vancouver
Intellijel Design	Vancouver
Laughlin Guitars	N/A
Long & McQuade Musical Instruments	368 Terminal Ave, Vancouver
Reimer Guitars	N/A
Roland	V3T 0K9 - Surrey
Shuriya Guitarcraft	V6P 5G5
Sonic Farm	N/A
Tinker Guitars	East Vancouver
Tom Lee Music Vancouver	728 Granville St, Vancouver

Warren Murfitt Guitars	V5L 2L3
West Coast Guitars	2741 E Hastings St #110, Vancouver, BC

Table B.11 Recording Studios and Rehearsal Spaces

NAME	ADDRESS
RECORDING STUDIOS	
Aero Music Company	Commercial Drive, Vancouver
After 6 Studios	515 W Pender St, Vancouver
Afterlife Studios Vancouver	1234 W 6th Ave, Vancouver
AMP Records	525 Seymour St, Vancouver
ARMOURY STUDIOS	1688 W 1st Ave #202, Vancouver
Barrel House Sound	N/A
Bionic Audio	2323 Quebec St, Vancouver
Blitz & Bloom Talent Group	Downtown Vancouver
Blue Light Studio	1839 Franklin St, Vancouver
Blue Wave	34 W 8th Ave, Vancouver
Brougham Records	1054 Hornby St, Vancouver
CREW Studios	181 1st St E, North Vancouver, BC V7L 1B2, Canada
CRYING SKY STUDIOS	312 Industrial Ave, Vancouver
Demitone Productions	5251 Chester Street, Vancouver
Dick & Roger's Sound Studio Limited	Suite 301 - 190 Alexander St, Vancouver
East Van Studio	870 Cordova St E, Vancouver
Fader Mountain Sound	201 W 7th Ave Unit B, Vancouver
Flatland Recording	N/A
Flavorite Music	2050 Scotia St, Vancouver

Fresh Air Audio	190 Alexander St, Vancouver
Gotham City Studios Ltd	Suite 101 - 1688 West 1st Ave, Vancouver
Greenhouse Studios Inc	1859 Franklin St, Vancouver
Habitat Recording	N/A
HippoSonic Recording Studio	201 W 7th Ave, Vancouver
Jacknife Sound	N/A
JC/DC Studios	N/A
Kangaroo Joe	650 Industrial Avenue, Vancouver
Kozmic Sound	191 W 3rd Ave, Vancouver
Madlucky Studios	316 West 5th Ave, Vancouver
Mike Fraser Mix	N/A
Monarch Studios	3702 Commercial St, Vancouver
Ocean Studios	1758 W 2nd Ave, Vancouver
Open Studios Productions	252 E 1st Ave #200, Vancouver, BC V5T 1A7
Orchid Studios	1701 Powell St #612, Vancouver
Park Sound OSW	1468 Columbia St, North Vancouver, BC V7J 1A2
Rain City Recorders	160 Salsbury Dr, Vancouver
Realfat Studio	2574 Arbutus St, Vancouver
Red Light Studios	275 Woodland Dr, Vancouver
Rukkus House	176 Salsbury Drive, Vancouver
Satellite Sound Lab	207 W Hastings St #210, Vancouver
Saturn's Child Studio	8475 Ontario St #209, Vancouver
Sound Kitchen Studios Vancouver	178 E 32nd Ave, Vancouver
Sound Lounge Productions	2333 Ontario St Suite 2, Vancouver
Static Wave Studios	5815 Yew St, Vancouver

Studio Downe Under	32535 Downes Road, Vancouver
Studio X Labs	Suite 105 - 480 Smithe Street, Vancouver
Suite Sound Labs	1701 Powell St, Vancouver
The Mix Room	2339 Columbia St suite 103, Vancouver
The Phonix Studio	1976 E 12th Ave, Vancouver
The Sawmill	8938 Shaughnessy St, Vancouver
The Warehouse Studio	100 Powell St, Vancouver
Vancouver Live Sound	525 Seymour Street, Vancouver
Wizard Sound Services	700 Hamilton St studio 4, Vancouver
Zed Productions	123 W 1st Ave, Vancouver
REHEARSAL SPACES	
Aurora Studios & Rehearsal Space	2Nd Floor - 8264 St George Street, Vancouver
Backline Rentals	1424 Frances St, Vancouver, BC
Carousel Theatre for Young People	1411 Cartwright St, Vancouver
CRYING SKY STUDIOS	312 Industrial Ave, Vancouver
Fader Mountain Sound	201 W 7th Ave Unit B, Vancouver
Gotham City Studios Ltd	Suite 101 - 1688 West 1st Ave, Vancouver
Greenhouse Studios Inc	1859 Franklin St, Vancouver
INEO Studios	120 Princess Ave, Vancouver
Jamnesium	William St & Clark Dr Vancouver, BC Canada
Martha Lou Henley Rehearsal Hall	1955 McLean Dr, Vancouver
Pandora's Box Studios	1890 Pandora St, Vancouver, BC
Renegade Productions	3030 E Broadway, Vancouver, BC
Sanctuary Studios	N/A
Sound Kitchen Studios Vancouver	178 E 32nd Ave, Vancouver

Soundhouse Studios	33 W 8th Ave, Vancouver, BC
Suna Studios	1385 Odlum Dr, Vancouver, BC
The Phonix Studio	1976 E 12th Ave, Vancouver
Vancouver Rockspace Rehearsal Studios	201 7Th Avenue W, Vancouver

Appendix C

Comparative Analysis

I. Brisbane

Music Ecosystem Overview

Brisbane has a busy local circuit, supported by local organisations such as QMusic. The majority of its year-round programming takes place in Fortitude Valley, although major events such as Big Sound bring visitors from across the country as well as international fans. There is a large electronic scene in the city, and favourite local venues include the Triffid and the Zoo. Historically, Brisbane was a hub of punk music, led by bands such as The Saints.

Because the hubs of Australia's music scene are Sydney (for major label headquarters) or Melbourne (for grassroots and indie music), Brisbane's scene is largely independent. There is a good network of independent labels and development organizations throughout the city, although concerns have been expressed about the next generation of music business professionals (as opposed to musicians), many of whom move to Melbourne or are enticed by the growing tech sector.

Geographically, Brisbane's music scene makes for an interesting comparison because, like Canada, Australia's cities are few and far between. This makes touring time consuming and costly, even downright unaffordable for amateur artists. Music scenes tend to be self contained, and acts who reach a certain level of success often move to larger cities.

Transport

Airports

Airtrain runs every 15 minutes between 5am and 10pm on weekdays and 6am-10pm on weekends. It travels to Brisbane, city suburbs and the Gold Coast. There are a few TransLink bus services which connect to the CBD, as well as several coach services which bring passengers to the Gold Coast, Sunshine Coast and Brisbane CBD.

Trains

NSW TrainLink operates passenger trains between Brisbane and Sydney, where connections can be caught for further service to Melbourne. There is also a train to Cairns operated by Queensland Rail, running five times a week. The journey takes 24 hours.

Because of the distance between cities, most if not all long-distance trains out of Brisbane are sleeper trains. It is usually more cost effective to fly between cities.

Public transport

Public transport is operated by TransLink. There is an extensive bus network serving both the CBD and suburbs, operating from 5am until midnight. NightLink buses run after midnight on Fridays and Saturdays with limited routes between the CBD and suburbs. Trains also service both city centre and the suburbs, running as early as 4.30am until 12.30am.

There are two free bus services in the city which run from 7am to 6pm on weekdays. They serve the CBD and the Spring Hill precincts. There is also a free CityHopper ferry service running from the North Quay to New Farm, which passes the Fortitude Valley entertainment district.

Licensing

Events

In safe night precincts, the Queensland government will issue six one-off permits per year to allow a venue to operate until 5am.²⁰⁶ Venues outside the precincts may apply for up to 12 permits. Applications must be made no less than 21 days before the proposed date. Although previously used by local venues to allow for extended hours, the government is emphasizing that these permits will be reserved for major events such as the Commonwealth Games, Big Sound or holidays such as New Year's Eve.

Event permits²⁰⁷ are needed for events which expect more than 2,000 people and are open to the public. They cost AUD \$1,448.45 for capacities between 2,000-10,000 and AUD \$2,966.15 for anything larger. Applicants must submit:

²⁰⁶ Caldwell (2017b)

²⁰⁷ Brisbane City Council (2017a)

- A site plan listing locations of sound sources, light sources, toilets, vendors, emergency routes
- Proof of insurance with a minimum of AUD \$20m coverage
- Management plans for sound, waste, temporary structures, electric and gas, security, food and alcohol and traffic and temporary road closures.

Liquor policy

Last drinks in Queensland are at 2am. In safe night precincts, this is extended to 3am, with approved permits.²⁰⁸ Shots are banned after midnight. There is a 30-minute window for patrons to finish their drinks. Venues are welcome to stay open for entertainment or to serve food.²⁰⁹

There are several kinds of licenses which music venues or venues providing music may be eligible for. Theatres and large events centres such as arenas will need a subsidiary on-premises license. Smaller venues, such as those whose primary function is to provide entertainment, will need a nightclub license. Applications generally take 4-6 months to process.

- Commercial other (subsidiary on-premises license): trading hours are between 10am and midnight, unless special permission is given. Fees for a new license are AUD \$1,342.00.²¹⁰ Some licenses may require an approved manager on site during operation hours, or they may require applicants to undertake a responsible management of licensed venues (RMLV) course.
- Nightclub license: if the primary activity is entertainment with accompanying alcohol sales. This permit allows holders to sell alcohol before 5pm if accompanied by a meal. The liquor license costs AUD \$1,342.00, with additional fees depending on the terms of the permit.²¹¹

Time regulations

Plans to introduce 1am lockout laws, modeled after those implemented in Sydney's Kings Cross district, were scrapped in 2017 after research showed it was unlikely to significantly reduce incidents of alcohol-related violence.²¹² Current 2am curfews (3am for safe night precincts) are still in place.

²⁰⁸ Caldwell (2017b)

²⁰⁹ Business Queensland (2017a)

²¹⁰ Office of Liquor and Gaming Regulation (2017a)

²¹¹ Office of Liquor and Gaming Regulation (2017b)

²¹² Caldwell (2017c)

Sound regulations

Special permits are issued for amplified music venues within SNPs, as set out in the Amplified Music Venues Local Law 2006.²¹³ Applicants must submit blueprints for their venue as well as an acoustic report. Permitted decibel levels vary depending on the area of the special entertainment district, the time of day, and the distance from the venue (ie, just outside the venue or in an adjacent or attached residential unit). A new Amplified Music Venue permit costs AUD \$753.60, with a AUD \$397.80 renewal fee or a AUD \$462.90 fee to change the terms and conditions of a permit.²¹⁴

Within Fortitude Valley, new developments must implement the following sound attenuation measures:

Table C.1 Proposed music sound emission levels for music venues situated in the Valley Special Entertainment Area²¹⁵

AVERAGE MUSIC SOUND EMISSION LEVEL	MUSIC SOUND EMISSION LEVEL TIME LIMIT	VENUE LOCATION
80 db (C) Leq	10 am - 1 am Thurs, Fri & Sat 10 am - midnight Other days	Valley Special Entertainment Area A
70 db (C) Leq	At all other times	Valley Special Entertainment Area A
80 db (C) Leq	10 am - midnight Fri & Sat 10 am - 11 pm Sun to Thurs	Valley Special Entertainment Area B
55 db (C) Leq	At all other times	Valley Special Entertainment Area B

Health and Safety

Safety regulations

Queensland has implemented Safe Night Precincts in areas across the state, primarily CBDs, including Brisbane's Fortitude Valley. They are managed by local boards comprised of local business owners, license holders, business associations and community organisations. Venue owners serving after midnight must participate in the board.²¹⁶ These

²¹³ Brisbane City Council (2006)

²¹⁴ Brisbane City Council (2017b)

²¹⁵ Brisbane City Council (2004), pg. 13

²¹⁶ Business Queensland (2017b)

boards act to present solutions from those most familiar with the area and provide a port of call to authorities.

The precincts have access to AUD \$750,000 of funding, with each precinct able to apply for up to AUD \$50,000 for administrative costs of board management. They also have access to AUD \$250,000 each for operation costs (AUD \$8m in total funding) which can be applied for with an accompanying precinct management plan.²¹⁷ Most precincts provide patrol units and rest and recovery spaces during peak nighttime hours (generally 11pm-3am, give or take). They serve to help intoxicated or distressed people have safe areas to recover.²¹⁸

ID Scanners

Queensland government implemented laws in July 2017 which made it mandatory for all venues serving alcohol after midnight to use ID scanners at their entrances. Although some funding would be made available to venues to adopt the technology, it was never determined how much or how venues access it.²¹⁹ Food primary establishments, hotels, casinos and events centres are exempt from the law.²²⁰

ID scanners operate on a closed data system accessible to the Office of Liquor and Gaming Regulation and the Queensland Police Service. It allows both authorities and other venues with ID scanners to jointly see who has been banned from a premises in the state. IDs must be scanned for anyone entering or reentering a venue after 10pm. If a venue does not scan the ID, they may be fined excess of AUD \$1,200.²²¹

Bans are issued per district, although data from all districts is shared on one database. Venues must obey court-ordered or state-issued bans, but it is at their discretion to refuse entry to someone who has been banned from a venue in another district.

Feedback from venues after the scanning laws were implemented was that queues were much longer, as even patrons leaving the venue briefly had to re-scan upon re-entering.

²²² Venues are also speaking out against the costs of the systems, including the licensed security guard who must operate the scanner, which is an extra paid staff member per venue. Costs are estimated at AUD \$2,000 additional per month, per venue.²²³

²¹⁷ Business Queensland (2017c)

²¹⁸ Queensland Government (2017a)

²¹⁹ Caldwell (2017b)

²²⁰ Queensland Government (2017b)

²²¹ Akers (2017)

²²² Bali (2017)

²²³ Akers (2017)

Environmental sustainability regulations

Although recycling is not mandatory in Brisbane, the city council offers toolkits and resources for businesses wishing to monitor their waste and provides recycling bins to businesses upon request.

Health issues

Binge drinking is an ongoing problem throughout Australia, emphasized by the backpacker scenes. In 2009, the NSW government launched an AUD \$1m anti-binge drinking campaign aimed at 16 to 20-year-olds which placed ads in the media, on buses and in public restrooms.²²⁴

In 2014, North Brisbane contained the highest concentration of irresponsible drinking, according to figures released by the Australian Bureau of Statistics from the National Health Survey.²²⁵ Over 40,000 adults were consuming at least 11 standard drinks per sitting.

However, a national study showed improvement in Australian drinking culture in the decade between 2007 and 2017.²²⁶ Only 6% of drinkers did so daily (down from 9% in 2007), 37% drank weekly (down from 47%) and only 16% drank to excess (down from 24%) where excess is considered 5 or more drinks per sitting. 20% of Australians said they abstained from alcohol, up 11% from 2007.

Labour issues

Queensland unemployment was at 6.2% in July 2017,²²⁷ just above the national average of 5.6%.²²⁸ The average person in Queensland earns AUD \$1496 per week,²²⁹ making it the third lowest state behind Tasmania and South Australia, although it is not specified if living costs are taken into consideration.

A more extensive report on the Brisbane music labour ecosystem will be published in 2018. It is a joint venture by Sound Diplomacy and QMusic.

²²⁴ Brisbane Times (2009)

²²⁵ Dunlevy (2014)

²²⁶ DrinkWise (2017)

²²⁷ Caldwell (2017a)

²²⁸ Janda (2017)

²²⁹ Caldwell (2017a)

Zoning

Entertainment District

Brisbane's Fortitude Valley is the primary entertainment zone. After a 1999 petition by residents about the threat of venue closures due to noise complaints, the city council implemented the Valley Music Harmony Plan²³⁰ to create a special entertainment precinct around Fortitude Valley. Certain venues outside of Fortitude Valley, such as the Tivoli, were also given special entertainment precinct status due to their historic significance to the local entertainment industry.

Throughout Brisbane, venues must apply for an Entertainment Venue Permit. The application must be accompanied by scaled blueprints of the venue, a location map of the surrounding area and a floor plan. A license fee costs AUD \$1875.65.²³¹

Agent of Change

Although not directly implemented, similar laws requiring new developments to incorporate sound insulation are in effect in special entertainment precincts such as Fortitude Valley.²³² Insulation must be stronger if the new developments share a wall with existing structures.

Parking regulations

High-traffic areas such as commercial areas and mixed-use areas have restricted parking to help local residents find parking. Permits to park in commercial spots such as loading bays cost AUD \$46.90 with a day rate of AUD \$2.40.²³³

Grant System

A full range of national and statewide grant opportunities is available on the QMusic website,²³⁴ with sources including APRA AMCOS and the Australia Council for the Arts.

²³⁰ Brisbane City Council (2004)

²³¹ Brisbane City Council (2017c)

²³² Brisbane City Council (2004)

²³³ Brisbane City Council (2017d)

²³⁴ QMusic (2017)

Brisbane City Council offers three schemes²³⁵:

- Creative Sparks Grants Program: with awards of up to AUD \$10,000, artists can apply under three tiers ranging from project-based funding, creative development opportunities and project expansion or distribution.
- Lord Mayor's Young and Emerging Artists Fellowships: For artists aged 17 to 30 seeking opportunities in training programs, mentorships or experience-based work. This work can be undertaken internationally and/or in one of Brisbane's sister cities, and winners can receive up to AUD \$20,000.
- Innovation Grants Program: for new and innovative creative businesses, this grant awards winners up to AUD \$10,000.

Arts Queensland, the funding body of the state government, also offers several funding schemes, a full list of which is available on their website. Below is a sample of music-specific awards:²³⁶

- Grant McLennan Fellowship: awards AUD \$25,000 to support songwriters or musical duos to travel to New York, London or Berlin for up to six months.
- Billy Thorpe Scholarship: awards AUD \$10,000 to emerging and developing artists over the age of 18 to use for career development, to include recording or networking opportunities.

²³⁵ Brisbane City Council (2017e)

²³⁶ artsQueensland (2017)

II. Montreal

Music Ecosystem Overview

Montreal's culture industry is worth CAD \$11 billion.²³⁷ Culture investment is part of the local identity. Quebec's media produces a lot of its own content, to support the French-Canadian identity, whereas cities such as Vancouver can get away with adopting American media. Quebec is also very Social Democrat, which emphasises the arts.

Montreal's Accès culture network aims to ensure local communities and visitors have access to culture by presenting venues and activities in 60 locations across the city's 19 boroughs.²³⁸ The network also provides artist residencies, mediation and activities focused towards schools and families.

As an example of one of Montreal's arts-led initiatives, 8 of Montreal's public libraries launched an instrument loan scheme.²³⁹ Supported by CAD \$108,860 in funding from Sun Life Financial and instrument donations (100 instruments from the original funder as well as private donations), the programme will allow cardholders to borrow the instruments for free. This is the third city to take part in the initiative, with Toronto and Vancouver leading the way.

Transport

Airports

The Montréal-Pierre Elliott Trudeau International Airport is the city's primary commercial airport, although the Montréal-Mirabel International Airport also offers some passenger flights.

Trains

VIA Rail provides trains to Quebec City, Ottawa and Toronto, while Amtrak services New York City.

Public transport

Société de transport de Montréal (STM, translated to the Montreal Transit Corporation) runs the city's public transport, which offers a mixture of bus, rail and

²³⁷ The Chamber of Commerce of Metropolitan Montreal (2015)

²³⁸ Ville de Montreal (2017a)

²³⁹ CBC News (2016)

underground/subway services. Most bus routes run between 5am and 1am, with night services operating between 1am and 5am. There are a few shuttle routes servicing high-traffic areas such as major event venues and tourist zones. Single trip fares cost CAD \$3.25, while a monthly pass runs CAD \$83.00.

All buses are gradually being equipped with iBUS systems to display information on traffic, delays and estimated arrival times.²⁴⁰ All bus routes are wheelchair accessible, but only the Orange Metro line is accessible.

Licensing

Events

In Montreal, each borough is responsible for issuing activities permits and will have their own terms and regulations. The Quebec government is in charge of issuing temporary licenses for private events, and they determine their own restrictions on an individual basis.

Special events permits for outdoor shows are issued by the Department of Culture, Sports, Activities and Development, the terms of which are decided on an individual basis.²⁴¹ Application processing times are estimated at 2-3 months.²⁴² Event organizers must notify residents and community members of area closure via public postings 10 days before the event (and via private post 7 days before the event for residents). They must ensure there is a traffic lane six metres wide and five metres high for emergency vehicles, with security officers at each intersection, and must assume all costs of parking signage for street closures and any towing costs. Security is the responsibility of the event organizers, and for those events with alcohol licenses, the Montreal Police may need to approve the security agency.

Other considerations and regulations for events are that maximum decibels are set at 80 dBA at 35 metres from any sound sources (speakers, amps, etc.).²⁴³ All alcohol must be consumed from plastic containers.²⁴⁴ Food permits are issued by the Quebec Ministry of Agriculture, Fisheries and Food (MAPAQ). Festivals and events must have a public toilet (chemical or permanent) onsite, with 1 unit for every 200 people.²⁴⁵ The sound curfew is

²⁴⁰ Société de transport de Montréal (2017)

²⁴¹ McGill University (2016)

²⁴² Le Plateau-Mont-Royal (2013)

²⁴³ Ibid., pg. 5

²⁴⁴ Ibid., pg. 6

²⁴⁵ Ibid., pg. 6

set at 11pm, although if an event is outdoors in a public space, there is no curfew to get people home.

Liquor policy

Alcohol permits are issued by the Quebec government, although individual boroughs are consulted for local zoning restrictions before the license is issued. Establishments granted a liquor license may serve between 8am and 3am the next day.²⁴⁶ Food primary licenses, such as those granted to restaurants, may only serve between 8am and 11pm.²⁴⁷ Application fees for liquor licenses are set at CAD \$254, and annual renewal rates range from CAD \$330 for a club to CAD \$563 for a bar or restaurant.²⁴⁸ An additional fee of CAD \$0.75 per person (up to a maximum of CAD \$800), calculated on venue capacity, may be added by the permitting authority. It is not specified whether this is added to the application fee or payable annually.

If hosting an event at a location which does not hold a liquor license, organizers must obtain a Reunion Permit by La Régie des alcools, des courses et des jeux (RACJ, translated to the Liquor, Racing and Games Board). Reunion Permit fees are calculated as CAD \$88 per day for sales authorized sites and CAD \$45 per day for bring-your-own sites, with maximum daily fees of CAD \$440 and CAD \$270 set, respectively.²⁴⁹

Grassroots Music Venues

Grassroots music venues are listed as entertainment venues, which has caused some problems in the past. Although they have no blanket curfew, they must close after the show. Because GMVs usually operate as hybrid venues and bars, where the artists get a portion (or all) of the door fee, venues are left to operate in a legal limbo. They have to keep the bar open in order to make a profit. Generally, authorities are aware of this and will look the other way as long as the venue is not a hub of antisocial or illegal activity and does not generate noise complaints. Some venues have begun having ‘DJ nights’ so they can stay open and serve on nights when they don’t have traditional shows.

Time regulations

²⁴⁶ Gouvernement du Québec (2017a)

²⁴⁷ Gouvernement du Québec (2017b)

²⁴⁸ Régie des alcools des courses et des jeux (2017)

²⁴⁹ Ibid.

All alcohol service must stop by 3am regardless of license. Time regulations in terms of events and sound are set on an individual basis.

Sound regulations

The city's Urban Planning and Business Services Branch is in charge of zoning, permits and sound control, although boroughs set further regulations on their own. Curfews are set by the Quebec government, with hours and restrictions on permits for public entertainers set according to each permit.²⁵⁰

Each borough sets its own bylaws.²⁵¹ For example, the borough of Ville-Marie, which is home to the Quartier des Spectacles (the city's entertainment district), can run fines from CAD \$1,500 to CAD \$12,000 for legal bodies and CAD \$300 to CAD \$10,000 for private offenders.²⁵² Ville-Marie enforced further sound restrictions at Parc Jean-Drapeau in 2011 which meant concerts in the area must not create sound above 80 decibels 35 metres from the stage.²⁵³

In 2016, only 2 boroughs, Ville-Marie and Le Plateau, had sound officers employed (one each).²⁵⁴

Sound complaints are handled by the police. In 2014, sound complaints in Ville Marie were mostly related to construction work or the like, with festivals and music accounting for 28% of complaints.²⁵⁵ Likewise, bars and clubs only accounted for 25% of 911 calls about sound complaints, with most of them being resident-vs-resident issues. Current bylaws in most, if not all, boroughs state that outdoor speakers are forbidden and sound should not be heard outside the premises.²⁵⁶

Health and Safety

Safety regulations

Building safety is determined by a number of factors, including provincial and local laws. Considerations are made on emergency exits, combustibility requirements, capacities, and other standard codes. In light of the increase in terrorist attacks at cultural events, such as those involving vehicles, Montreal police created a guide to prepare local festivals

²⁵⁰ Ville-Marie Montréal (2011)

²⁵¹ <https://www.spvm.qc.ca/en/Fiches/Details/Noise>

²⁵² Ville-Marie Montréal (2014)

²⁵³ CBC News (2011)

²⁵⁴ McGill University (2016)

²⁵⁵ Ibid., pg. 15

²⁵⁶ Ibid.

for such events.²⁵⁷ The report makes many recommendations, including the use of concrete barriers instead of metal fencing, and provides advice on drafting effective evacuation plans.

Several music festivals in Montreal have launched initiatives to combat sexual harassment and abuse, particularly towards women.²⁵⁸ Osheaga festival hired women to patrol the grounds for incidents and offer help where needed, while Montreal International Jazz Festival carried out a similar scheme after noticing the male-dominated security staff.

The Conseil des Montréalaises, an advisory group on gender equality, presented the city council with a series of recommendations to combat harassment and feelings of unsafety at music festivals. The report called on festivals to provide safe spaces, information on sources for further help and the inclusion of the perception of women's safety on customer satisfaction surveys.²⁵⁹

Environmental sustainability regulations

Recycling is not mandatory in Montreal. In 2014, recycling was at 58.3%.²⁶⁰ Boroughs set their own recycling laws, and most businesses are left to foot the costs of their own recycling, which discourages them from recycling at all. All festivals and events are responsible for site cleanup. All businesses and commercial properties are responsible for cleaning up trash on the premises.

Health issues

Quebec is moving towards legalized and regulated marijuana, but the bill has been postponed to work out the terms of law.²⁶¹ Originally set to pass in July 2018, authorities and politicians are calling for another year to negotiate terms such as tax distribution and sales and advertising laws.

There has been some concern about caffeinated alcoholic drinks such as Four Loko and FCKD UP, which are often targeted at young people who have just reached drinking age. Their ingredients offer a dangerous combination of sugar, caffeine and high alcohol content, the effects of which have already spelt legal trouble for some brands in the US.²⁶²

Canada's widespread opioid crisis has prompted Quebec to equip emergency responders, including police and firefighters, with naloxone, a drug which counteracts overdoses. The

²⁵⁷ CBC News (2017b)

²⁵⁸ Friend (2017)

²⁵⁹ Ahmad (2017)

²⁶⁰ Tortorici (2016)

²⁶¹ Authier (2017)

²⁶² CBC News (2017a)

programme was given a CAD \$200,000 budget and will distribute the drug to anyone aged 14 and up without the need for a prescription.²⁶³

Labour issues

In August 2017, the city's unemployment rate reached its lowest point in a decade, at 6.1%.²⁶⁴ 124,000 jobs were added in the 12 months preceding the census, notably in the construction and tourism sectors. This figure was almost triple that of job growth in Toronto (44,000) and over triple that of Vancouver (37,000).

Hourly wages grew 3.3% in the province, but there was also a noted decline in working age population and employment for people aged 15-24.²⁶⁵ There was also an increase towards the end of the year in those declaring self-employed status.

In 2013, there were 82,000 cultural jobs in Greater Montréal, accounting for 70% of the provincial culture workforce.²⁶⁶ The average cultural sector person earns 7% less than other industries in Montréal.²⁶⁷ Independent performing arts workers, such as artists and authors, receive an average income of CAD \$23,500 per year.²⁶⁸

Zoning

Entertainment District

Although each borough sets its own by-laws, many are the same or similar. The Plateau-Mont-Royal borough, which has the highest concentration of artists and venues, requires all commercial buildings to have an Occupancy Permit outlining the land usage. This land use further determines the terms of alcohol licenses and the maximum square footage of the venue.

For example, in order for a concert venue to obtain an Occupancy Permit in Plateau-Mont-Royal, the space must have been built or converted for primary use, charge an entrance fee, publicize its events and allow customers to reserve tickets. If these terms are not met, then the use of a building as a concert venue is deemed an accessory to another use, such as a bar.

In Plateau-Mont-Royal, units occupied by a bar, discotheque or a concert hall and a residential use must not touch. This limits noise and vibration problems. Concert halls are

²⁶³ Fidelman (2017)

²⁶⁴ Serebrin (2017)

²⁶⁵ Blatchford (2017)

²⁶⁶ The Chamber of Commerce of Metropolitan Montreal (2015)

²⁶⁷ Ibid., pg. 15

²⁶⁸ Ibid., pg. 15

permitted to have bars as long as they do not take up more than 20% of the area and are not advertised outside the building.

Quartier des spectacles

The Quartier des spectacles is downtown Montreal's primary entertainment and arts district. It boasts over 30 performance venues in an area just over 1km², as well as public spaces for its over 40 events per year. The district was designed for music and cultural events, with several projectors bringing surrounding infrastructure to life, lamp posts designed for rigging, illuminated walkways and several other urban design features. Although originally intended to support the Montreal International Jazz Festival, it now serves other cultural events. During the summer, the area is pedestrian-only.

The district can host 50,000 people in its various spaces, and organizations can apply to hold events via the Quartier des spectacles website, which lists each public space alongside their respective specs. Proposed events must be free to the public and must not act as a sales or promotional platform for commercial entities.²⁶⁹

Agent of Change

There is no formal law or process in place, and sound complaints are handled on an individual basis from a team of municipal staff, elected officials and the police.

Parking regulations

Parking permits are determined by individual boroughs within the city.²⁷⁰ Overall, boroughs seek to reduce vehicle dependency due to traffic congestion and environmental considerations. In Plateau-Mont-Royal, for example, parking is allocated at 1 parking spot for each 200 sq metres of commercial use land. Venues which occupy more than 500 sq metres must have at least 5 bicycle parking spots, with another mandatory spot for each additional 200 sq metres. A maximum of 100 units can be made available.

²⁶⁹ Quartier des spectacles Partnership (2017)

²⁷⁰ Ville de Montréal (2017b)

Grant System

56% of the money fueling Greater Montréal's arts organizations comes from private sources (donations, sponsorships and sales), with the rest made up by government grants.²⁷¹ In 2015, Montreal invested CAD \$44m in culture and the arts, above the national average of CAD \$32.5m.²⁷² Of this, CAD \$10.2million was issued in grants, just over their budget of CAD \$9.7million.²⁷³

The City of Montreal offers financial assistance to festivals and cultural events with outreach programmes appealing to regional, national and global audiences.²⁷⁴ Although awards are unspecified, there are two categories of applicants: those for events with budgets over CAD \$500,000 and those with budgets under CAD \$500,000. Events must be organized by non-profit entities headquartered in Montreal.

The city also provides financial support to venues to upgrade to digital equipment. Both for-profit and non-profit venues can apply for up to 90% of their total renovation costs, with up to CAD \$50,000 each for venues less than 400 capacity and CAD \$75,000 each for larger venues. The total budget is CAD \$1.5m.²⁷⁵

The Montreal Arts Council offers several business subsidies, the largest recipients of which are the Montreal Opera (CAD \$180,000), the Metropolitan Orchestra (a total of CAD \$280,000) and the Montreal Symphony Orchestra (CAD \$435,000).²⁷⁶ Organizations receiving operating support from Montreal's Arts Council over multiple years must submit interim and final reports on the funding use and state of their business.

Beyond this, the council offers several scholarships and awards such as the Jazz Creation Scholarship (2 awards at CAD \$5,000 each) and Diversity Award in Music (value of CAD \$38,000), as well as several multi-sector awards. It also offers several practical services, such as internship coordination, network development for young artists and low-cost studio rentals in the city. Finally, there are a few residency programs across all cultural disciplines, with an extra residency programme focused on Aboriginal work.

The Quebec Arts Council also offers 31 grants related to music, according to its website. They range in categories from research to development, travel and project promoting cultural diversity. Notably, there are also a few artist residency and accommodation

²⁷¹ The Chamber of Commerce of Metropolitan Montreal (2015), pg. 23

²⁷² Information obtained through interview with Emmanuelle Hébert, Cultural and Creative Industries Advisor for the City of Montreal

²⁷³ Conseil des arts de Montreal (2015)

²⁷⁴ Ville de Montreal (2017c)

²⁷⁵ Ville de Montreal (2017d)

²⁷⁶ Conseil des arts de Montreal (2017)

support programs in the province.²⁷⁷ Many of these are exchange programs between artists in Colombia, Scotland, Dresden, New York, Rome, and Tokyo, among other destinations, as well as some local residencies. The programs range in eligibility, duration and grant amount, with recipients often staying multiple months and receiving anywhere from CAD \$5,000 to CAD \$25,000 to support the costs of living abroad. Most grants have multiple tiers, with awards for emerging artists or mid-career artists (the latter must meet a certain requirement of published work prior to applying).

²⁷⁷ Conseil des arts et des lettres du Québec (2017)

III. Toronto

Music Ecosystem Overview

An economic impact analysis released in 2014 estimated that 80% of Canada's recording industry revenue is based in Toronto.²⁷⁸ However, the city is not immune to the challenges facing local music scenes around the world. Almost 70 nightclubs and music venues have shut down in Toronto in the last ten years.²⁷⁹

In 2014, the Toronto Music Advisory Committee was created to act as voice of the industry facing council authorities. The city also appointed a music sector development officer, the first of its kind. In February 2017, the TMAC proposed the implementation of Agent of Change, a Live Music Venue Registry, a Music Venue Task Force, tax incentives for venue owners and updated noise bylaws.²⁸⁰

Toronto is one half of the Austin-Toronto Music City Alliance, a partnership which promotes the two cities to share best practice and create a network of jobs, trade and musical showcases.²⁸¹

Transport

Airports

Toronto Pearson International Airport is the city's main hub, although the Billy Bishop Toronto City Airport runs a few regional flights. Toronto Pearson can be accessed by the UP Express train running every 15 minutes between 5.30am and 1am, as well as several bus routes to downtown Toronto, the suburbs, and surrounding cities. Greyhound buses also provide a regular service to cities in Ontario and New England in the US.

In 2017, Toronto Pearson International Airport took part in a scheme called YYZ Live, which featured daily concerts to greet international arrivals. 150 performances took place total, with 75 local grassroots artists playing for visitors.²⁸²

Trains

²⁷⁸ City of Toronto (2014)

²⁷⁹ Gillis (2017)

²⁸⁰ Ibid.

²⁸¹ City of Austin (2017)

²⁸² Gonshor (2017)

Toronto is connected to other Canadian cities via several via Rail routes, as well as New York City by a daily Amtrak service.

Public transport

Subway lines run from 6am until 1.30am, except on Sundays when they start at 8am. There are only four subway lines, so buses and streetcars are often a better option to get passengers closest to their destination. Buses runs from 6am (8am on Sundays) until 1am every day. Most of the streetcars operate a 24-hour service.

Licensing

Events

Alcohol licenses for public events are either issued to non-profit or charity organizations. If the organizer does not fall under this category, they must obtain a letter from their local council stating the event is significant to the area.²⁸³ Local authorities must be notified of the event 30 days prior if the capacity is less than 5,000 people per day, or 60 days prior if more people are expected.

For outdoor public events, street closure permission must be requested at least 8 weeks prior to the event, more if the roads are main roads (up to 52 weeks for an expressway). Application fees and permit fees range depending on the nature of the event, but can be as little as CAD \$25 application/\$83.09 + HST permit for small block parties, or as large as CAD \$200 application/\$2,500 + HST for large, multi-day music festivals.²⁸⁴ Applicants must notify nearby residents and businesses, submit an event schedule, submit a site plan and outline an emergency management plan.

Outdoor permits allow events in parks between 6am and 11pm,²⁸⁵ and music below 85 dBA between 7am and 11am, unless a sound exemption permit is issued.²⁸⁶ All events must be non-profit and free of charge to the public. Permits for commercial events such as festivals or performances are charged according to the desired park, ranging in rates from CAD \$3,883.65²⁸⁷ to CAD \$11,650.96 per day needed.

Liquor policy

²⁸³ Alcohol and Gaming Commission of Ontario (2017a)

²⁸⁴ City of Toronto (2017a)

²⁸⁵ City of Toronto (2017b)

²⁸⁶ City of Toronto (2017c)

²⁸⁷ City of Toronto (2017d)

Liquor licenses are issued by the Alcohol and Gaming Commission of Ontario and cost CAD \$1,055.²⁸⁸ Applicants must submit floor plans to scale as well as capacity measurements completed by an approved body (such as the fire department or building department). In Ontario, licensed premises can serve between 11am and 2am, with service permitted until 3am on New Year's Eve. This includes Special Event Permit Holders.²⁸⁹ Licensed premises are required to post the Sandy's Law sign, which warns women against Fetal Alcohol Spectrum Disorder.

Sound regulations

Toronto's sound bylaws permit 85 dBA between 7am and 11pm. Noise Exemption Permits are issued for special events and permit sounds of up to 85 dBA 20 metres from the sound source. Applicants must submit a site plan, a CAD \$100 application fee, a Parks Permit if applicable and payment for a dedicated sound monitor if applicable (at a rate of CAD \$60 per hour per officer, with a mandatory two officers after 7pm).²⁹⁰ Amplified sound is not permitted in residential areas at any time.²⁹¹

Health and Safety

Safety regulations

There are some standard safety guidelines in place for public performances, such as clear and signed emergency exits, safe electricity wiring, adequate lighting, weatherproofing for outdoor events and emergency evacuation management plans.

Environmental sustainability regulations

Recycling laws are made at provincial levels, with a few local bylaws. Business that do not utilize city-issued waste bags placed at collection points face fines.

In order to qualify for city collection service, business must meet a range of criteria pertaining to the size of the building and building use (for example, sole commercial or mixed use).²⁹² Collection fees vary based on the category of recycling (i.e. organic, paper, etc.) and the amount of collections per week. They are charged at an annual rate, although standard bins collection is charged per tonne.

²⁸⁸ Alcohol and Gaming Commission of Ontario (2005)

²⁸⁹ Smart Serve Ontario (2017)

²⁹⁰ City of Toronto (2017e)

²⁹¹ City of Toronto (2009)

²⁹² City of Toronto (2017f)

Health issues

No major substance abuse or binge drinking trends stood out in searches or news bulletins.

Labour issues

Unemployment in Ontario was at 5.8% in May 2017, its lowest rate since 2001.²⁹³ No census has been taken in terms of musicians or cultural sector employment.

Zoning

Entertainment District

Toronto has an Entertainment District built around an existing cluster of nightclubs and venues in the downtown area. There are 40 venues within the city that hold a nightclub license, and most of them are in this district, with the council rarely giving the status to venues in other areas.²⁹⁴ Zoning bylaws outside the Entertainment District do not support nightclubs, and it is virtually impossible to convince neighbourhood councillors to approve a zoning amendment.

Agent of Change

Agent of Change is not currently implemented, but it was brought forward by the Toronto Music Advisory Council in February 2017. It is still being discussed and should not be expected to be implemented anytime soon, if approved.²⁹⁵

Parking regulations

Loading space allotment is determined according to the use of the building, the size of the premises and access to nearby parking, and are not always mandatory.²⁹⁶

Grant System

Funded by the City of Toronto, Toronto Arts Council is the primary body for grants supporting music and the arts. In 2016, the council provided just over CAD \$2.85m in

²⁹³ Crawley (2017)

²⁹⁴ Mann (2017)

²⁹⁵ Rancic (2017)

²⁹⁶ City of Toronto (2013)

grants to music organizations and artists.²⁹⁷ There are several schemes available to music-based applicants, primarily funded through the city's Community Partnership and Investment Program. They include:

- Music Annual Operating: For professional non-profits who have previously won two project grants from the council. Grant amounts are determined based on the project.
- Community Music Making: For non-profit community organizations with annual budgets of less than CAD \$150,000. They must have received at least three project grants through the council and must not be receiving funding through any other Council scheme. Grants are a maximum of CAD \$25,000 per year for three years.
- Music Creation and Audio Recording: Creation grants of up to CAD \$5,000 are available to assist with living expenses and project costs. Recording grants of up to CAD \$4,000 are available for demos/EPs (not full-length albums) to assist in production costs, packaging, and some online promotion. Recording grants of up to CAD \$10,000 are available for full length albums, to include manufacturing and some digital media costs. Artists with disabilities may apply for an additional CAD \$5,000 to support exemplary costs which may be incurred during the process.
- Music Multi-Year Operating: For past recipients of the Annual Operating Award, to assist in long-term organization goals. Maximum grant limits are not specified.
- Music Project Grants: For professional artists or non-profit organizations to assist in one-off project costs. The maximum grant is CAD \$15,000.

²⁹⁷ Toronto Arts Council (2017)

IV. San Francisco

Music Ecosystem Overview

San Francisco is known for its impact on the music scenes of the 60s and 70s, led by acts such as Jefferson Airplane and Janis Joplin. In the 90s, the city had a thriving EDM scene as well as a strong indie rock community.

Today, many musicians are being priced out and the city is known for its tech industry, centred in nearby Silicon Valley. This is at many levels, from the cost of domestic living to the cost of commercial space which makes it difficult to provide rehearsal areas or music venues, often the key supporters of emerging and developing artists.

The challenges facing the music industry and nightlife in the city led to the development of the San Francisco Entertainment Commission in 2002. The Commission acts to promote and regulate the city's nightlife, most notably passing Agent of Change laws to protect venues against noise complaints from new developments.

Transport

Airports

San Francisco is serviced by San Francisco International Airport, from which the city is accessible via rail (BART). A ticket can be purchased for USD \$17.90 return between the airport and downtown San Francisco, but is ultimately calculated according to the length of the journey.

There is also Oakland International Airport, accessible via BART for USD \$20.40 return. Finally, San Jose Airport serves the greater area and can be accessed through public transport via Caltrain commuter rail as well as several bus routes

Trains

San Francisco can be reached by Amtrak trains from cities across the country such as Seattle, Portland, Sacramento, Los Angeles, Fresno, Chicago and Denver.

Public transport

Within the city, the bus and metro system, Muni, operates a collection of buses and trains (USD \$2.75 single) as well as cable cars/trams such as the F-line heritage streetcar (USD \$7 single). Metro stations run from 5am-1am weekdays, 6am-1am Saturdays and 8am-1am Sundays. Most cable cars and buses make begin runs from 5am/6am until 12.30am, with the except of 'Rapid Transit' services which cease services after the 'work rush' of 6pm/7pm. There is also an Owl Service bus route of buses which run from 1am to 5am

There are app-based taxi services, such as Uber, Flywheel and Lyft, which operate throughout the city. There are also traditional taxi services. Unlike most cities, San Francisco has a variety of taxi companies serving the area. A directory is available on the SFMTA website.²⁹⁸

The city has a 511 SF Bay Transit Trip Planner app to plan routes as well as NextBus, which provides real time arrival information.

Licensing

Events

For festivals, licenses are held by individual alcohol booths. There is no blanket license for the festival, and special daily licenses are only issued to existing non-profit groups.²⁹⁹ They are sold as separate licenses for each type of retail; i.e. one must purchase wine licenses separate from beer licenses.

The Police Department gets final approval of alcohol permits for festivals and determines how much security festival organizers must hire through the police force.³⁰⁰ With hired officers being paid time and a half by festival organizers, security is often cited as one of the largest costs of organisation. A previous lack of application standardisation meant fees varied at the discretion of the Police Department and could be determined within days of the event, making it difficult to budget.

For one night events, security plans must be provided alongside applications and must prove that there will be at least one security guard for each 100 people, there is a 50-foot safety perimeter around the site and there is an adequate disbursal plan.³⁰¹ The permit costs USD \$272.00 and can be obtained from the SFEC, but organisers must also coordinate

²⁹⁸ <https://www.sfmta.com/getting-around/taxi/taxi-companies>

²⁹⁹ Tyson (2011)

³⁰⁰ Green (2015)

³⁰¹ San Francisco Entertainment Commission (2017a)

permissions from the Building, Fire and Health Departments. Applicants must provide information on:

- Place of Entertainment Permit
- Place of Public Assembly Permit
- Public Eating Place Permit (if seeking to serve food)
- Security Plan
- Floor Plan and Events Schedule
- If the event is held outdoors

Limited Live Performance permits are issued for venues which offer occasional entertainment such as live music. Applicants must also provide their business license, liquor license (if applicable) and permits from the Department of Health and Fire Department. The permit costs USD \$441, with an annual tax renewal fee of USD \$174.

A Place of Entertainment permit costs USD \$2,019.00, with an annual renewal fee of USD \$587.00.

A full list of fees, divided by use, is available on the Commission website.³⁰²

Liquor policy

Licensing is done by the state of California. All alcohol sales, either by drink at a licensed venue or by package at a store, are forbidden between the hours of 2am-6am. Sales permission may be further restricted according to the terms of licensing.³⁰³ This also means that licensed premises may not serve just prior to the 2am cut-off. All consumption should cease at 2am.³⁰⁴ Minors (under 21) may not be onsite as guests or employees of Liquor Primary establishments, although some exceptions are made for musicians performing onsite.³⁰⁵

Liquor primary licenses are notoriously difficult to obtain in San Francisco, and often run up to USD \$300,000 in the secondary market.³⁰⁶ However, a new scheme, the Neighbourhood Restricted Special On-Sale General Licenses, has been introduced for food-primary venues in specific neighbourhoods to obtain licenses for USD \$13,800.³⁰⁷

³⁰² San Francisco Entertainment Commission (2017b)

³⁰³ California Department of Alcoholic Beverage Control (2017a)

³⁰⁴ Ibid.

³⁰⁵ Ibid.

³⁰⁶ Burke (2017)

³⁰⁷ California Department of Alcoholic Beverage Control (2017b)

According to an interview with Jocelyn Kane, former Executive Director of the San Francisco Entertainment Commission, there are some zoning laws which have created moratoriums, but they are very fluid and complicated.

Time regulations

Alcohol consumption has to stop at 2am regardless of license. Sound also has a cut off of 2am. Curfews for public events are determined on an individual basis.

Sound regulations

The San Francisco Entertainment Commission handles most music venue-related sound complaints and employs people specifically suited to the work. This helps any issues be addressed fairly and quickly. While the state sets some sound regulation policies, some areas of San Francisco only specify that sound not be 'audible' beyond the parameters of the licensed area.³⁰⁸

Amplified music permits for loudspeakers or primary sound sources located outdoors come at a fee of USD \$541. This fee can be waived for some bodies, such as non-profits or community organisations. Amplified music with conditional or extended use permits may not be played between 2am and 6am.³⁰⁹

Health and Safety

Safety regulations

Entertainment and nightlife venues with food and/or alcohol licenses will need an A-2 permit issued by the Fire Department, which approves safety features such as capacity, assembly points, sprinkler systems and extinguishers, ventilation and electrical safety.³¹⁰

All existing commercial buildings, when remodeled must include at least one accessible entrance, toilets and nearby parking. All new buildings must be completely accessible to include all entrances, all toilets, and all areas within the building.³¹¹

The San Francisco Entertainment Commission's Good Neighbor Policy emphasises that establishments should be well-lit, maintain a waste-free premises both indoors and

³⁰⁸ San Francisco Department of Public Health (2014), pg. 10

³⁰⁹ Ibid., pg. 14

³¹⁰ San Francisco Fire Department (2015)

³¹¹ San Francisco Department of Building Inspection (2008)

outdoors, provide toilets for patrons, ensure noise is not audible outside the premises but provide contact details for neighbours in case of complaints so initial incidents can be handled privately.³¹² The Commission also recommends at least one licensed security guard when there are more than 100 people on site.

Environmental sustainability regulations

As of 2009, all trash in San Francisco must be separated by recyclable, compostable and landfill trash. New environmental laws went into effect in early 2017.³¹³ Notably, San Francisco is the first municipality in the US to ban the use/sale/distribution of polystyrene foam due to its links to cancer and its being non-biodegradable. Newly constructed buildings up to 10 stories tall must also reserve at least 15% of their roof space for solar panels or a green roof.

Health issues

Alcohol is the number one reason for admission into treatment in the area, although it is steadily declining. Figures were at 6,883 in 2013. Alcohol-related casualty admissions in 2011 were at 328.3 per 100,000 people (national rates were 134.6).

The National Institute on Drug Abuse's Bay Area profile (revised in 2014)³¹⁴ notes a rise in methamphetamine use and decline in cocaine use. Methamphetamine paraphernalia comprised 37.8 of all seized drugs and drug items in 2013.³¹⁵

Labour issues

Unemployment in San Francisco is at its lowest level in 15 years³¹⁶, with the East Bay area at 4%, the South Bay area at 3.5 percent, and the San Francisco-San Mateo area at 3%. Between 2015 and 2016, the job market has expanded 2.7% in the Bay Area. This is more than the state total of 2.3%, and significantly higher than the U.S. total of 1.6%.

³¹² San Francisco Entertainment Commission (2013), p. 15

³¹³ Rodriguez (2016)

³¹⁴ Gleghorn (2014)

³¹⁵ Ibid.

³¹⁶ Avalos, George (2016)

Zoning

Entertainment District

According to Kane, San Francisco does not have Entertainment Districts. There is zoning in place that allows entertainment in certain areas and not in others, but that is not the same. Zoning has also changed over the years, so this is fluid.

Zoning has an effect on the building use and conditions of any licenses obtained. The San Francisco Planning Department Zoning Center provides information on approved addresses for creating entertainment venues. The Small Business Center also assists entrepreneurs in securing locations and accessing neighbourhood demographics.

Agent of Change

Notably, San Francisco passed Agent of Change laws in 2015.³¹⁷ These laws mean that any venues can continue to operate at their licensed levels without fear of complaint from new residential or office developments. It is the responsibility of the developer to inform any new residents of the existing sound in the area. Likewise, if a new venue opens, it is its own responsibility to take sound attenuation measures to protect those business and residences already in the area.

Parking regulations

Parking space and permission is issued by the Department of Public Works.

Grant System

Grants for the Arts (GFTA) has given out over USD \$320million in grants to non-profit organizations in the city. Eligible organizations are those in good financial standing, three years of business operations under their belt and present a solid administrative team.³¹⁸

The San Francisco Arts Commission offers a variety of grants for projects directed at youth or marginalized communities, cultural heritage projects (up to USD \$100,000), arts facility planning or improvement (up to USD \$100,000) and individual artist grants.³¹⁹ Funding is allocated from both the city budget as well as private donors. The Commission also issues

³¹⁷ Book (2015)

³¹⁸ Grants for the Arts (2017)

³¹⁹ San Francisco Arts Commission (2017)

street artists licenses, awarded through a lottery system, applicable to areas downtown, along Fisherman's Wharf and the Justin Herman Plaza.

The California Arts Council offers statewide grants and funding for projects in the areas of education, media, community outreach, cultural heritage, youth development, research, disability assistance and accessibility and arts for veterans.³²⁰

³²⁰ California Arts Council (2017)

V. Seattle

Music Ecosystem Overview

Seattle's music scene rose to fame in the 90s when grunge acts such as Nirvana and Soundgarden made their mark on the world. Today, EDM, hip-hop and indie rock are the most popular genres in the area.

Like many cities, Seattle's biggest challenge is affordability, both in terms of housing and workspace. Additionally, there is a lack of music management professionals in the area, as many either move to industry meccas such as Los Angeles or utilize their skills in Seattle's growing tech industry, boosted by Amazon's expansion into Seattle in 2010.³²¹

The city of Seattle has a dedicated music office, the Office of Film + Music, which works to implement the city's music strategy alongside the Music Commission. They share a budget and some personnel with the Office of Economic Development, and coordinate several initiatives throughout the year to promote the industry, such as workshops and industry networking opportunities.

Transport

Airports

Seattle is served by Sea-Tac International Airport, which operates all commercial passenger flights in the city. Public transportation to and from the airport is through buses and Link Light Rail, although the airport is also running a pilot programme with app-based taxi services such as Lyft, Uber and Wingz.

Link Light Rail runs between 5am and 1am on Monday through Saturday and 6am to midnight on Sundays, with trains running every 6 to 15 minutes.³²² It terminates at the University of Washington, with many stops in downtown areas and suburbs. Fares are determined based on distance. Metro bus lines run between the airport and both suburban and downtown zones, with an additional two express routes serving outlying towns such as Bellevue, Tacoma and Lakewood.

³²¹ Engleman (2010)

³²² Port of Seattle (2017)

Trains

Amtrak operates train services to Portland and Los Angeles. Amtrak Cascades services Vancouver (Canada), Tacoma, Portland, Salem and Eugene. Empire Builder runs to Chicago, Minneapolis/St. Paul, Spokane and Portland.

Public transport

There are two transportation companies in Seattle: King County Metro Transit, which runs bus services, and Sound Transit, which runs the Link light rail. There is also a small streetcar system, owned by the City of Seattle, which runs from 6am to 9pm on weekdays and 6am to 11pm on weekends.

Bus timetables vary by route, but generally run between 5am and 2am. A limited Night Owl service, offering 18 routes, runs between midnight and 5am.³²³ It services many outlying neighbourhoods as well as the Sea-Tac airport.

Licensing

Events

Special Event Permits are issued by the Special Events Office. It is recommended to apply for a permit as soon as possible, even if that means a couple years in advance.³²⁴ The application takes at least three months to process depending on the scale and nature of the event. Permits have three different fees which must be paid: an application fee (USD \$75), an administrative fee (determined by the square footage of the event area, and the amount of commercial vendors and alcohol sales points) and a police department fee (for all commercial and athletic events, organizers must be USD \$67 per hour per police or security officer, with a two hour minimum). Other fees towards licensing and permits, staff, fire department checks, etc. may also be applicable. Any subsequent events under the same series will receive a 25% discount on the administration fee.

Event organizers are responsible for coordination traffic control and securing barricades. Sound levels and monitoring strategies for outdoor/public events are determined with close consultation between the Superintendent of Parks and Recreation, the Director of Transportation, the Director of the Seattle Center and the Department of Construction.³²⁵

³²³ King County Metro (2017)

³²⁴ City of Seattle Special Events Office (2017)

³²⁵ City of Seattle (2009), Section 25.08.520.E

Events must hold a USD \$1m General Liability Insurance which insures the City of Seattle for all special events. This is a minimum, and may be raised if the event sells alcohol or includes pyrotechnics, animals, or other special features.

Liquor policy

Statewide alcohol laws allow sales between 6am and 2am, although local governments can minimize these hours at their own discretion. Liquor licenses are issued as an addendum on business licenses, distributed by the Washington State Department of Revenue Business Licensing Service and the Liquor and Cannabis Board. Applications need to be submitted 90 days before the scheduled business opening. There is an administration fee of USD \$75, which is usually non-refundable.³²⁶ They can be submitted online through the Liquor and Cannabis Board website, in person or via post.

Nightclubs are permitted to sell spirits, beer and wine for consumption on site as long as their primary business hours are between 9pm and 2am. They must provide entertainment and derive their primary income source from alcohol sales, a cover charge or a combination of the two. The license costs USD \$2,000.³²⁷ Arenas and other large-scale entertainment facilities can serve alcohol at ticketed events after submitting an operation plan to the State Liquor and Cannabis Board. The license costs USD \$2,500.³²⁸

Sound regulations

Sound regulations are set out in the Seattle Municipal Code.³²⁹ Permissible exterior sound levels are outlined in the following table:

³²⁶ Washington State Liquor and Cannabis Board (2017b)

³²⁷ Washington State Liquor and Cannabis Board (2017c)

³²⁸ Ibid.

³²⁹ City of Seattle (2009)

Table C.2 Seattle sound regulations³³⁰

DISTRICT OF SOUND SOURCE	DISTRICT OF RECEIVING PROPERTY		
	RESIDENTIAL (DB(A)) (LEQ)	COMMERCIAL (DB(A)) (LEQ)	INDUSTRIAL (DB(A)) (LEQ)
RESIDENTIAL	55	57	60
COMMERCIAL	57	60	65
INDUSTRIAL	60	65	70

Between 10pm and 7am on weekdays, and 10pm and 9am on weekends and holidays, the decibel levels in the table are reduced by 10 dB(A) when the receiving property is in a dedicated residential district.³³¹

The Chief of Police is responsible for enforcing sound bylaws, although they may call upon other city departments to assist them if needed.³³² Sound penalties range from USD \$150 to \$2,000 depending on the violator’s previous record and the level of nuisance.³³³

Health and Safety

Safety regulations

No information on business safety regulations, such as employing security personnel, could be found.

Environmental sustainability regulations

In 2015, Seattle became the first US city to implement recycling laws resulting in non-compliance fines.³³⁴ Residents and businesses are forbidden from putting food scraps, compostable paper or recyclables in their garbage.³³⁵ All food and food-soiled paper

³³⁰ City of Seattle (2009), Subchapter III, Section 25.08.410

³³¹ City of Seattle (2009), Subchapter III, Section 25.08.420.A

³³² City of Seattle (2009), Subchapter III, Section 25.08.660

³³³ City of Seattle (2009), Subchapter III, Section Section 25.08.960

³³⁴ Radil (2015)

³³⁵ Seattle Public Utilities (2017a)

products are required to be composted. Business owners are required to provide food waste and recycling services on site for glass, plastic, aluminum, food and compost.³³⁶

Health issues

Seattle-Tacoma-Bellevue is in the top 25% of cities across the nation in terms of binge drinking or heavy drinking levels, with 1 in every 5 adults drinking excessively. However, the city also ranks as Washington state's healthiest city, with only 11.4% of adults reporting themselves as being in fair or poor health.³³⁷

Marijuana is legal in the state of Washington, but with restrictions. It is only legal for adults aged 21 and over to purchase from state-licensed stores and may not be consumed in public. Purchase limits depend on the form, with 16 ounces of edibles permitted and one ounce of useable marijuana. Anything more than 5 nanograms per milliliter of blood is considered driving under the influence and can result in severe penalties.³³⁸

Labour issues

The Seattle-Bellevue-Everett metro area has an unemployment rate of 3.7%,³³⁹ lower than the national average of 4.3%.³⁴⁰ The average household in Seattle earns USD \$78,612 per year.³⁴¹

A 2015 study by the Musicians' Association of Seattle estimated 16,607 people directly employed by the music industry, totalling USD \$1.8billion in direct economic generation.³⁴² Indirectly, the industry supports 30,660 jobs and USD \$4.3billion in economic output. There is a lack of music management professionals in the independent sector, as the videogame and tech industries utilize the same skill sets and pay more.³⁴³

Musicians are met with many uncertainties in their careers, such as work agreements and contracts, as well as poor compensation. Most self-identified professional musicians earn over half of their total income from music, which amounts to approximately USD \$15,000 per year.³⁴⁴ Their incomes are barely above poverty level.³⁴⁵ 65.7% of musicians were underpaid for their work (when amounts were agreed upon) and 44.4% were paid for less hours than they ended up working. Other payment issues involve broken agreements

³³⁶ Seattle Public Utilities (2017b)

³³⁷ Stebbins and Comen (2017)

³³⁸ Washington State Liquor and Cannabis Board (2017a)

³³⁹ Rosenberg (2017)

³⁴⁰ Seattle Times (2017)

³⁴¹ Stebbins and Comen (2017)

³⁴² Musicians' Association of Seattle (2015)

³⁴³ Information obtained through interview with Kate Becker of the Seattle Office of Film + Music, 6-11-2017

³⁴⁴ Ibid., pg. 4

³⁴⁵ Ibid., pg. 5

between contractors and musicians, with contractors often taking excess fees such as admissions tax from the musicians' paychecks.³⁴⁶ Emerging and low-level musicians can also be asked for blackout dates when playing a festival, which results in a huge loss of income that musicians at their level cannot afford.

Zoning

Entertainment District

Seattle does not have a dedicated 'entertainment district.' Zoning and land use is determined by the Department of Construction & Inspections, with maps available on their website. Seattle has four district categories when determining planning and bylaws: residential, commercial, industrial and 'other' which can be classified on an individual basis.³⁴⁷ In mixed-use zones combining commercial and residential areas, commercial units must be aesthetically complimentary to residential units and must not encroach on residence-heavy areas.³⁴⁸

Agent of Change

Agent of Change is not implemented. Noise complaints are dealt with on an individual basis.

Parking regulations

Like most cities, Seattle has predetermined parking zones, often with time and use restrictions depending on the district use (ie, commercial or residential). This is to help ease congestion in the city. Vehicles may not be parked on a city street for longer than 72 hours.

Commercial Vehicle Load Zones are permitted to allow for delivery and loading units. Applications are made online and cost USD \$195 for an annual permit and USD \$98 if submitted after July 1.³⁴⁹

³⁴⁶ Ibid., pg. 18

³⁴⁷ City of Seattle (2009) Section 25.08.100"

³⁴⁸ Seattle Department of Construction & Inspections (2017)

³⁴⁹ Seattle Department of Transportation (2017a)

Restricted Zone Parking Permits for high-traffic areas allow residents and frequent visitors to place a decal on their vehicle. Costs vary according to the area, but generally run at USD \$65 and are good for the year.³⁵⁰

Grant System

The Seattle Office of Arts & Culture has a several funding schemes and opportunities, including, but not limited to³⁵¹ :

- Cultural Facilities Fund: recently expanded to USD \$1.25m,³⁵² the fund exists to help arts spaces build or renovate their spaces.
- LHPAI Facility Grant: allows use of the Langston Hughes Performing Arts Institute and its staff, with no monetary award.
- Youth Arts grant: awarded to teaching artists, this grant is dedicated to after-school education and development for middle school and high school-aged children. There are prizes of USD \$6,000 per year for two years to support educational costs such as space, marketing, salaries and equipment.
- Civic Partners grant: provides three years of support to local non-profit organizations with a three-year history of contributing to the community.
- Arts Mean Business grant: support for organizations serving or employing minority communities such as immigrants, refugees, people of colour and those differently-abled. Awards of up to USD \$25,000 are granted to be used to salaries or contract costs.

There are also several non-government grants and funding sources, such as 4Culture, Artist Trust (statewide) and the Puffin Foundation. Additionally, there are several practical and service-based sources for help, to include Washington Lawyers for the Arts (provided free or low-cost legal advice), Capitol Hill Housing and MusicPro Insurance.

³⁵⁰ Seattle Department of Transportation (2017b)

³⁵¹ Seattle Office of Arts & Culture (2017)

³⁵² Lindsay (2017)

VI. Comparative Table of Laws

Table C.3 Comparative table of laws

CITY	LIQUOR LAWS	SOUND LAWS	EVENTS LAWS
VANCOUVER (PRICES IN CAD)	-2am curfew (1am on Sun-Thur) - most bars in the Granville Entertainment District are open until 3am on Saturday and Sunday -Application fees for liquor primary between \$893 - \$4,825	-70 dB if received within an activity zone, 60 dB if received within a quiet or residential zone -Levels are lowered by 5 dB between 10pm-7am on weekdays and 10pm-10am on weekends	-\$92.82 - \$579.94 for small community events -\$272.76 - \$2,320.69 for commercial events (price negotiable for events with over 5,000 people)
BRISBANE (PRICES IN AUD)	-2am curfew (3am in Safe Night Precincts) -No shots after midnight -\$1,342, with additional fees depending on permit terms	-80 dB between 10am and midnight/1am (depending on district). 70 dB all other times -Amplified Music Venue permits cost \$753.60 -Renewal fees are \$397.80	-12 special permits per year to stay open until 5am (6 if venue is in an SNP) -\$1,448.45 for events between 2,000-10,000 people -\$2,966.15 for events over 10,000 people
MONTREAL (PRICES IN CAD)	-3am curfew (11pm for food primary licenses) -Application fees are \$254, with renewal rates of \$330 for a club and \$563 for a bar or restaurant -Additional fee of \$0.75 per person in capacity (max \$800) may be issued	-Laws set by each borough	-Laws and fees set by each borough -11pm noise curfew -Reunion Permits issued at \$88 per day (maximum \$440) for alcohol sales and \$45 per day (maximum \$270) for bring-your-own
TORONTO (PRICES IN CAD)	-2am curfew (3am on New Year's Eve) -\$1055	-85 dBA between 7am-11pm -Noise exemption permits issued for \$100 with possible additional fees -No amplified music in residential areas	-Permits only issued to non-profits or charities, unless special permission is given -11pm sound curfew -Fees depend on the event, but range from \$25 (\$83.09 +HST) for small events to \$200 (\$2,500 + HST) for large events -Commercial events in public parks charged from

			\$3,883.65 to \$11,650.96 per day
SAN FRANCISCO (PRICES IN USD)	<ul style="list-style-type: none"> -2am curfew for consumption -Liquor primary licenses are difficult to obtain and run up to \$300,000 in the secondary market -\$13,800 for food-primary, only issued to certain neighbourhoods 	<ul style="list-style-type: none"> -Place of Entertainment permit costs \$2,019, renewable for \$587 -Amplified music permits cost \$541 -No amplified music between 2am-6am 	<ul style="list-style-type: none"> -Daily licenses only issued to existing non-profits -Event permit costs \$272.00 (may be additional costs for applicants collecting permissions from various departments) -Limited Live Performance permits issued for venues at \$441. Renewable for \$174
SEATTLE (PRICES IN USD)	<ul style="list-style-type: none"> -2am curfew statewide, but local governments can restrict this further -\$2,000 for nightclubs -\$2,500 for large-scale venues such as arenas 	<ul style="list-style-type: none"> -Between 57-70 dBA for commercial, industrial or mixed-use neighbourhoods -Reduced by 10 dBA between 10pm-7am (9am on weekends) if receiving property is in a residential zone 	<ul style="list-style-type: none"> -Events permits are charged based on size and nature of event. -Application fee of \$75 -Commercial events must hire police officers at \$67/hour for a two hour minimum

Appendix D

An Overview of the City of Vancouver's Licensing & Permitting Regulations for Live Music Venues & Events

A Contribution to the Vancouver Music Ecosystem Study

Prepared by: Robert Catherall

LIST OF ABBREVIATIONS

CBD - Central Business District

FEST - Festival Expedited Staff Team

LCLB - Liquor Control and Licensing Branch

SEP - Special Event Permit

SOCAN - Society of Composers, Authors and Music Publishers of Canada

SOL - Special Occasion License

VCH - Vancouver Coastal Health

VCT - Vancouver Civic Theatres

VFD - Vancouver Fire Department

VPD - Vancouver Police Department

DEFINITIONS

Assembly Occupancy Space - An enclosed space that the City of Vancouver has deemed appropriate for large crowds of people to gather safely

The Vancouver Charter - British Columbia provincial legislation that outlines the rules that govern how the City operates, what bylaws City Council can create, and how budgets are set. Under the Charter, City Council has the authority to pass bylaws to regulate such things as noise and land use, buy and sell property, collect certain taxes, approve expenditures, take on debt, give grants, and hire and discharge employees.

I. Opening a venue, including a liquor licence

POLICY CONTEXT

Since the mid-1990s, the City of Vancouver Liquor Licensing Policies and Procedures have placed an emphasis on approving licenses along the “Theatre Row Entertainment District” (between the 700-900 block of Granville Street) of up to 1,000 seats for general entertainment uses in the Vancouver CBD. There is a focus on new liquor primary licenses being approved in hotels, particularly in the Downtown Eastside where no new liquor primary or retail shops are allowed to open. The reasoning is to relocate some cabaret seats from the residential areas of Downtown South.

DEVELOPMENT PROCESS & REGULATIONS

According to the City of Vancouver’s Cabaret and Restaurant Guidelines, opening a new venue requires holding a referendum polling residents and businesses within a 2,000 foot (610 m)—or 1,000 ft (305 m) for hotel bars—radius and should be carried out at the expense of the applicant. At least 60 percent of those polled should approve the proposed development. For any new venues opening, the building should be air-conditioned so that it is not necessary to open doors or windows, which would negate the soundproofing.

The development process for opening a new building that would be approved for assembly occupancy (i.e. suitable to host live music as part of its regular business operations) would have to go through a three step process. First, the applicant files a pre-site application with the Chief License Inspector. Next, the applicant receives the endorsement of Council subject to the applicant acknowledging their understanding of a four-month Time-limited Development Permit process. Finally, the applicant submits a Development Permit application. The Development Permit approval will be granted subject to satisfactory compliance with the relevant requirements of the Zoning and Development, Parking and/or Official Development Plan By-laws. See also Sections 12 and 13 of the City of Vancouver’s Cabaret and Restaurant Guidelines document for further details on processes regarding development permit approvals for new venues.

BUSINESS REQUIREMENTS

In order to operate a live music venue, a business requires:

- 1) City of Vancouver Business License
- 2) City of Vancouver Building Inspection Approval to verify your establishment is suitable for assembly occupancy (i.e. a space appropriate for large crowds of people to safely gather)
- 3) Federal Business Registration (free)
- 4) SOCAN Musical Performing Rights License
 - a) For live performances, the SOCAN fee is 3% of ticket sales
 - b) For festivals, the SOCAN fee is 3% of ticket sales, minimum \$35

- 5) Re:Sound License, for pre-recorded, not live, music, or what is often referred to as ‘can music’. Fees vary based on use type.
- 6) City of Vancouver Acoustic Report for performance venues/general establishments as per Noise Control Bylaw No. 6555
 - a) Commercial establishment daytime max dBC: 70
 - i) ‘Daytime’ hours: 7am-10pm, Monday to Saturday; 10am-10pm, Sunday and holidays
 - b) Commercial establishment nighttime max dBC: 65
 - i) ‘Nighttime’ hours are any not included by the definition of ‘daytime’ hours
 - c) 55 dBC max if commercial establishment has a shared wall with residential
 - d) 80 dBC max if a liquor primary is in a Commercial or Industrial Zone
 - e) 75 dBC max if a liquor primary is in a Residential or Mixed Use Zone

ALCOHOL SERVICE

Venues serving alcohol must have a liquor license, and the provincial liquor regulatory body, the Liquor Control and Licensing Branch (LCLB) issues permits for a business to serve liquor. The City must approve the location and type of Liquor Serving permit as well.

The City of Vancouver has their own business typologies for liquor serving establishments. Those where live music can be performed are:

Table D.1 Business typologies for liquor serving establishments

CLASS OF BUSINESS PREMISES	DESIGNATED AREA	HOURS AND DAYS
Restaurant	Downtown Eastside	6:00 a.m. to 2:00 a.m. every day
Standard Hours Liquor Establishment	Downtown Eastside	11:00 a.m. to 12:00 a.m. from Sunday to Thursday;
Extended Hours Liquor Establishment		11:00 a.m. to 1:00 a.m. on Friday and Saturday
Standard Hours Liquor Establishment	Downtown - Primarily Commercial	11:00 a.m. to 2:00 a.m. each day
	Non-Downtown - Primarily Commercial and Industrial	11:00 a.m. to 2:00 a.m. each day
Extended Hours Liquor Establishment	Downtown - Primarily Commercial	9:00 a.m. to 3:00 a.m. each day

	Non-Downtown - Primarily Commercial and Industrial	9:00 a.m. to 3:00 a.m. each day
Standard Hours Liquor Establishment	Downtown - Primarily Mixed Use	11:00 a.m. to 1:00 a.m. from Sunday to Thursday;
		11:00 a.m. to 2:00 a.m. on Friday and Saturday
Extended Hours Liquor Establishment	Downtown - Primarily Mixed Use	9:00 a.m. to 2:00 a.m. from Sunday to Thursday;
		9:00 a.m. to 3:00 a.m. on Friday and Saturday

1. Standard Hours (11a.m. - midnight, 1a.m., or 2a.m., depending on the neighbourhood) or Extended Hours (9a.m. or 11a.m. - 1a.m., 2a.m., or 3a.m., depending on the neighbourhood and day of the week) Liquor Establishments
 - a. Class 1 - max capacity 65
 - b. Class 2 - max capacity 150
 - c. Class 3 - max capacity 300
 - d. Class 4 - max capacity 500
 - e. Class 5 - max capacity 950
 - f. Class 6 - 950+ capacity
 - g. Standard Hours Liquor Establishment Annual operating fee: \$6/seat up to \$3,016 per year
 - h. Extended Hours Liquor Establishment Annual operating fee: \$16.30/seat up to \$22,047 per year
 - i. Class 7 (aka 'Club License') is not used very commonly because it is for a venue that serves registered members. However, they do exist, eg ANZA Club and WISE Hall use this license to host live music that is open to the public
2. Restaurant Class 1 with liquor service
 - a. Does not allow dancing or karaoke
 - b. Annual Fees: \$757 + \$9.90/seat
 - c. Liquor serving hours: 9a.m. - 1a.m. Sunday to Thursday, tables cleared by 1:30a.m.; 9a.m. - 2a.m. Friday and Saturday, tables cleared by 2:30a.m.; no music allowed between 1a.m. and 9a.m.
 - d. Must have full restaurant menu available during all alcohol service hours
 - e. Need to show receipts with food:liquor sales ratio
 - f. Can offer live music until 1a.m.
3. Restaurant Class 2 with liquor license
 - a. Allows dancing or karaoke
 - b. Annual Fees: \$757 + \$9.67/seat

- c. Liquor serving hours: 9a.m. - 1a.m. Sunday to Thursday, tables cleared by 1:30a.m.; 9a.m. - 2a.m. Friday and Saturday, tables cleared by 2:30a.m.; no music allowed between 1a.m. and 9a.m.
 - d. Must have full restaurant menu available during all alcohol service hours
 - e. Need to show receipts with food:liquor sales ratio
 - f. Can offer live music until 1a.m.
4. Lounge permits for craft breweries, distilleries, and wineries
 - a. Can stay open until midnight
 - b. Live and/or pre-recorded music is allowed
 - c. Minors may enter a brewery lounge, if accompanied by a guardian
 - d. In the City of Vancouver, brewery lounge spaces can be up to 80 m²
 - e. A brewery's lounge may be adjacent to a restaurant and customers may go freely between the two spaces; the restaurant must have a separate Restaurant license (Class 1 or 2)
 - f. Brewery lounge permits are provincially regulated and issued as part of a liquor manufacturer's business license
 - g. The arts event license can also be used in a brewery lounge
 5. See Schedule B (page 84) of City of Vancouver Bylaw no. 4450 for application fees for a new licensed establishment: <http://bylaws.vancouver.ca/4450c.PDF>

BYLAWS

1. Venue closing times differ throughout Vancouver, as outlined in Business Premises Regulation of Hours By-law No. 8022
2. Alcohol serving staff must have Serving It Right certification (\$35 fee for online course)
3. Class 3-6 Liquor Establishments (both extended and standard) must have at least one trained security employee for every 150 customers after 9pm or when there are more than 150 customers
4. Extended Hours establishments have to have security cameras installed and retain the tapes for 21 days
5. Class 5-6 Liquor Establishments must have a staff with First Aid on site from 9pm or 500+ customers
6. Class 3-6 Extended Hours must have metal detectors at each entrance from 9pm-close
7. Further use specifications for different business types can be found in City of Vancouver By-law No. 4450, specifically of interest to this report are:
 - a. Arts & Culture Indoor Event (Section 10.3.1A)
 - b. Dance Hall (Section 13.2)
 - c. Discotheque - Teenage (Section 13.3)
 - d. Late Night Dance Event (Section 19.2)
 - e. Liquor Establishment (Section 19.2A)

f. Restaurants (Section 24.3)

II. Organizing a party in the city/ street

In order to put on an event that takes place on the street, an organizer needs to apply for a Special Events Permit (SEP). This is done through the city's Film & Special Events Office in the Engineering Services department, which is responsible for events that take place on Vancouver's streets and sidewalks.

1. There is an online application form for organizers of street festival events to fill out, which is handled by the Film and Special Events office:
http://app.vancouver.ca/fase_net/appform.aspx
2. After the application is submitted, it is designated a file number and is assessed by city staff. Larger events with higher potential impact can potentially have their application forwarded to Vancouver Police Department (VPD), liquor licensing staff, and/or Vancouver Fire Department (VFD). Sometimes the event organizer will get invited to a Festival Expedited Staff Team (FEST) meeting to answer any questions these groups or city staff may have. Event organizers are then given action items to update, depending on their proposal, that can include updated engineering drawings, changes to their proposed liquor license, site management changes, and so forth. The City appoints a liaison to the applicant at this point. The liaison provides limited assistance to the applicant and is primarily available to coordinate the transfer of information and documents between the applicant and the FEST team.
3. As the event date approaches, the city liaison sends out conditional approval to the applicant, so they can get the necessary event insurance and liquor license permits.
4. A large block party has rigid specifications because the City pays for insurance, so event organizers need to send a site plan and traffic management plan to the city liaison for these types of events.
5. Mandatory security is the responsibility of the event organizer, and many of them choose to use private security firms because VPD is relatively expensive.
6. If food is to be served at an event, a permit must be acquired from Vancouver Coastal Health.
7. There is an established approach to special event activations that occur in the public domain because there is a need for the City to establish that the event organizer is competent and able to produce their event, yet there is no toolkit for organizers.

III. Organizing a party/ festival in the park

Licenses and permits for events that take place in Vancouver parks are granted through the Vancouver Park Board, which is a separate, democratically elected, entity from the City of Vancouver. Requirements for event promoters to host an event are:

1. Special Event Permit from the City of Vancouver (as in Section II of this report) as well as an approved event permit from the Vancouver Park Board, the latter of which can require:
 - a. Obtaining approval from the Development Services Department if any temporary structures are going to be used at the event (eg tents/canopies, stage, generator, portable washrooms, etc),
 - b. Obtaining approval from Vancouver Coastal Health if any food will be served,
 - c. Obtaining a Special Occasion License from the LCLB if alcohol is going to be sold at a beer garden (or similar).
2. Site Plan.
3. Budget.
4. Event insurance.
5. A strategy for “Greening your Event”, which consists of a waste disposal strategy that includes portable toilet rentals, as well as compost, garbage, and recycling bins and (optionally) water fountains and bike racks, all of which can be rented from the City of Vancouver.
6. Residents and businesses within a two block radius should be notified of the event before the event takes place.

IV. Organizing an event with a municipal Civic Theater(s)

Events are organized with Vancouver Civic Theatres (VCT) through the same process as any other event that takes place in a venue approved for assembly occupancy. Events at Civic Theatre venues have all the necessary permits to host live music events and are oriented toward non-profit organizations and charities, both of whom receive a reduced rate. VCT’s unionized staff and large venue sizes create greater overhead costs and contribute to higher than normal rental rates for Vancouver music venues.

1. VCT operates four theatre spaces of various capacities:
 - a. The Annex (193 cap.)
 - b. The Playhouse (668 cap.)
 - c. The Orpheum (2,672 cap.)
 - d. Queen Elizabeth Theatre (2,765 cap.)

2. VCT is responsible for event permitting at the Queen Elizabeth Plaza outdoor public space.
3. Rates depend on the type of event and venue, and events can be booked online via <https://vancouvercivictheatres.com/plan-an-event/rental-estimator/>.

V. Organizing an event that requires a Special Event Permit (SEP) or Special Occasion Liquor License (SOL)

A Special Event Activity Proposal is the permit required for hosting an event on any private property within the City of Vancouver while a Special Occasion License is a permit to serve alcohol at a temporary event in either a public or private space and is regulated by the LCLB. A Special Events Permit is required for hosting an event on Vancouver city streets and sidewalks, as described in Section II. Organizing a party in the city/ street.

1. In order to host an event using the Special Event Activity Proposal, the building it is to be held in must be in an assembly approved space, which typically includes offices or warehouses, both of which have specific safety requirements that need to be addressed before approval. The Vancouver building bylaw 10908 outlines these requirements, and can include consideration such as emergency lighting, evacuation doors, and fire suppression, among other items.
2. To serve Liquor, a Special Occasion License is needed, which can be applied for online. The permit costs \$100 and events with over 500 people in attendance must be approved by VPD.
3. If food is to be served at an event, a permit must be acquired from Vancouver Coastal Health.

If an event takes place in a building not approved for assembly occupancy, an Arts Event License must also be acquired by the event organizer in addition to a Special Event Activity Proposal on Private Property. However, event organizers are limited to a maximum of three (3) Arts Event License permits per month.

1. If done at an Arts & Culture space that is not approved for assembly occupancy (250 capacity maximum), a City of Vancouver operating permit is required. The requirements for this permit are:
 - a. Up to 30 persons: free
 - b. 31 - 60 persons: \$26/event
 - c. 61 - 150 persons: \$104/event
 - d. 151 - 250 persons: \$156/event
2. Additional staff as outlined in Section 10.3.11 of City of Vancouver By-law No. 4450

Table D.2 Ratio of required supervisory staff per number of attendees

Number of Persons Attending	Required Supervisory Staff
Under 100	2
101-150	3
151-200	4
201-245	5

1. Have a plan forwarded to (1) the Police and (2) Fire Chief
2. An Event Site Management Plan must be created by event organizers, which includes:
 - a. Safety and security plan template
 - b. Emergency evacuation procedures template
 - c. Base life safety checklist
 - d. Event contact sheet
 - e. Sample neighbourhood notification letter

VI. Organizing an event on civic property (i.e. buildings and land)

Events that take place on city owned land or private property, such as Cirque de Soleil, must submit a Special Event Activity Proposal form to obtain an event permit through the City’s License office, in the Development, Buildings, and Licensing Department. Events that take place on non-public city owned property must file an application through Real Estate & Facilities Management.

1. The License office is responsible for any ‘address based’ business licensing (eg bricks and mortar stores, liquor-related establishments) as well as for special events that take place within those spaces. This includes parking lots and buildings, regardless of whether they’re city owned or not.
2. The City’s Licensing office evaluates the site’s land use to determine whether an update to its building permit and/or electrical permit is required.
3. At the licensing office’s discretion, the application can require a site plan and/or floor plans for the intended layout of the space as well as photos of the current building, any of which can then be reviewed by VFD and/or VPD for safety and potential impacts.
4. If food is to be served at an event, a permit must be acquired from Vancouver Coastal Health.

5. Additional elements that might be necessary for a permit's approval are determined on a case by case basis.
6. The permitting process can take anywhere between 2 - 6 weeks, depending on an event's complexity.

VII. Late Night Dance Event License

A permit to host a Late Night Dance Event can be acquired by an event organizer to put on an alcohol-free event in any space approved for assembly occupancy, whether through their business license or an event permit, that operates from 2 - 6a.m.. The requirements to obtain this license are:

1. A reference letter from the venue involved, indicating their approval 6 - 7 weeks prior to the event date.
2. Contact list and Event schedule.
3. Floor plan, security plan, and fire plan that meet industry standards.
4. Proof of liability insurance coverage naming City of Vancouver as "Additional Insured".
5. Background information on similar events applicant has been involved with.
6. A dress code is in effect for Late Night Dance Events. Organizers are required to provide dress code signage. A sample wording shown on the signage is required for the permit application.
7. License Fees:
 - a. Max 350 capacity - \$315/event
 - b. Max 750 capacity - \$554/event
 - c. Max 2000 capacity - \$948/event
 - d. 2000+ capacity - \$1263/event
8. All Late Night Dance Events hosted by the same event organizer must be a minimum of 28 days apart.

VIII. Clarifying what legalities and responsibilities with respect to licensing and permitting for music and music-related events each level of government is responsible for

PROVINCIAL

The most powerful actor in Canadian liquor licensing is the provincial regulatory body, which in British Columbia is the Liquor Control & Licensing Branch (LCLB). The LCLB is

responsible for issuing liquor licenses for venues/bars/restaurants across the province; they also set the maximum limits to how many permits can be issued. In British Columbia, there is currently a ten-year moratorium on liquor primary licenses (i.e. those that would typically host live music) that began in 2012. The LCLB is also responsible for approving and issuing Special Occasion License (SOL) permits, which allow businesses that do not usually sell alcohol to do so for a temporary event. The Liquor Control and Licensing Act, which oversees all aspects of liquor throughout the province, allows municipalities to control the approval of brewery tasting rooms, sale of alcohol at farmer's markets, and if and where consumption of alcohol can occur in public spaces.

MUNICIPAL

Municipalities are able to set policies for outlining where liquor licenses will be approved, building design and specifications, noise levels, and venue capacities. Their operations are enabled through land use policies and zoning bylaws. The City of Vancouver has enabling legislation from the Province, The Vancouver Charter, that allows it to approve building re-zonings by amending its civic bylaws.

FEDERAL

The Canadian federal government has very little to do with the regulatory control of alcohol in general, and nothing that is relevant to this study.

IX. Concluding remarks

A key theme that arose during this research was how inaccessible knowledge of Vancouver event permitting and liquor licensing is for event organizers and entrepreneurs. Moreover, because so many different civic departments are responsible for different city elements, when it comes to acquiring an event permit few event organizers utilize more than one permit type. In an interview with a licensing team member of the city's Film & Special Events Office, it was noted that an interface to facilitate communication between municipal bylaws and regulations, public safety agencies, and provincial regulations would create a holistic approach to creating a streamlined event licensing process.

Furthermore, a crucial distinction exists between areas licensed for assembly occupancy, and those that are not. This distinction is not readily available in the City of Vancouver literature or on its website, but is important nonetheless. Only a building that is deemed fit for assembly occupancy may be granted a business license that would allow someone to host live music performances on a regular basis. Determining whether a building is fit for assembly occupancy or not can be difficult, however, since the criteria for evaluating

buildings that are not normally considered venue spaces (eg warehouses, art spaces, etc) is unclear and not readily available for event producers to consider. The by-law that governs the suitability of spaces for assembly occupancy (Vancouver Building Bylaw No. 10908) is more than 300 pages in length and can be difficult for event promoters or entrepreneurs to navigate.

Appendix E

An Overview of the City of Vancouver's Advertising Regulations

Pertaining to Music, Culture, & Events

Prepared by: Robert Catherall

I. Posters and Signs on City Property (street, sidewalk, or boulevard, and parks)

The City of Vancouver Engineering Services Department is responsible for the physical management of all signs and posters on city streets. The Vancouver Street & Traffic By-Law 2849 Sec. 83(2) regulates the placement of advertising devices on Vancouver city streets. Other than a business sign, outdoor advertising on City property pertaining to music, culture, and events can only take place on designated poster cylinders or as sandwich boards/sidewalk signs.³⁵³

A business identification sign must adhere to the myriad specifications outlined in the Sign Bylaw³⁵⁴, and generally require a sign permit. Banners, temporary signs, and window displays do not require a sign permit, however.

³⁵³ <http://vancouver.ca/doing-business/posters-and-signs-on-city-property.aspx#>

³⁵⁴ <http://vancouver.ca/your-government/sign-bylaw.aspx> and <http://vancouver.ca/files/cov/sign-by-law-user-guides-business-identification-final.pdf>

Figure E.1 Sign By-law Guide: Business Identification Signs³⁵⁵

SIGN BY-LAW GUIDE – BUSINESS IDENTIFICATION SIGNS								
BUSINESS IDENTIFICATION SIGN TYPE	PERMIT REQUIRED	RESIDENTIAL SIGN DISTRICT	COMMERCIAL, MIXED USE & INDUSTRIAL SIGN DISTRICT	CHINATOWN & GASTOWN HISTORIC SIGN DISTRICT	WEST END SIGN DISTRICT	GRENVILLE STREET SIGN DISTRICT	ROGERS ARENA SIGN DISTRICT	INTERNATIONAL VILLAGE SIGN DISTRICT
Awning and Under Awning	•		•	•	•	•	•	•
Canopy and Under Canopy	•		•	•	•	•	•	•
Banner		•	•	•	•	•	•	•
Fascia – First Storey	•	•	•	•	•	•	•	•
Fascia – Above First Storey	•	•						
Fascia – Second Storey	•		•	•	•	•	•	•
Fascia – Above the Second Storey	•							
Fascia – Up to 3 Storeys	•		•					
Fascia – Upper Level	•		•	•		•	•	
Freestanding	•	•	•	•	•	•	•	•
Freestanding – Wayfinding	•		•					
Mansard Roof	•		•	•	•	•		
Projecting	•		•	•	•	•	•	•
Sign in Conjunction with a Mural	•		•	•	•		•	
Temporary Signs		•	•	•	•	•	•	•
Window			•	•	•	•	•	•
Signs with Animated Copy	•					•		
Electronic Message	•	•	•		•	•		

³⁵⁵ <http://vancouver.ca/files/cov/sign-by-law-user-guides-business-identification-final.pdf>

The image above shows which signage type require permits and which districts they are allowed in via the Sign Bylaw.

There are seven different Sign Districts, each with their own regulations.

- Chinatown & Gastown Historic Sign District
- West End Sign District
- Granville Street Sign District
- Rogers Arena Sign District
- International Village Sign District
- Residential Sign District
- Commercial, Mixed Use and Industrial Sign District

Permit applications for business identification signs are filed through the Department of Buildings, Services, and Licensing.³⁵⁶ The sign permit application fee is \$294.

Signs on City Parks are managed by the Park Board, through authority granted by the Vancouver Charter legislation.

Poster Cylinders

Figure E.2 Example of poster cylinder in Vancouver



Poster cylinders are mounted on designated City street light poles where people can display their poster advertisements free of charge. There are 349 of these designated sign poles throughout the City of Vancouver, and the City has provided a map of these designated locations [here](#).

All sizes and types of posters are accepted, unless they contain offensive material. Glue paste or tape should be used to stick posters to the cylinder. Posters are removed periodically by city sanitation crews when cylinders become full and bloated.

³⁵⁶ <http://vancouver.ca/doing-business/sign-permit.aspx>

Posters that are placed on utility poles that do not have a poster cylinder or on any other area of City property are considered to be placed illegally and will be removed and discarded weekly and violators may be prosecuted.

Sandwich Boards & Sidewalk Signage



Figure E.3 Example of sandwich board in Vancouver

Advertising signs on City property are allowed only if the City guidelines³⁵⁷ for their placement are followed:

- One sandwich board per business no larger than 60 cm × 90 cm (23.5 in × 35.5 in) may be on City property (eg, a sidewalk)
- The sign must be directly in front of the store that is being advertised
- The sign must be up against the building wall or at the property line (not in the middle of the sidewalk or at the curb of any street)
- All advertising must meet the requirements noted on the Advertising Standards Canada at <http://www.adstandards.com/en/>

Note: Third-party signs and advertisements are strictly prohibited on centre medians, and will be confiscated from them.

II. Advertising on Private Property Without a Sign Permit

Figure E.4 Example of private property advertisement in Vancouver



³⁵⁷ <http://vancouver.ca/files/cov/sandwich-board-signs.pdf>

A select few forms of advertising are exempt from applying for a sign permit, under Section 6 of the City of Vancouver’s Sign By-law (By-law no. 11879)³⁵⁸ that are worth noting for the advertising opportunities they provide.

Construction Hoarding

Under Section 6.11 “Hoarding Signs” of the Vancouver Sign By-law, advertising on construction hoarding that is on private property does not require a sign permit, if it adheres to the following:

- The advertisement has a combined copy area no greater than 9.3 m² on each frontage;
- in the RA-1 or First Shaughnessy zoning districts or on a site less than 2000 m² in an RS or RT zoning district, is limited to three signs on each frontage of the site, each with a sign area no greater than 0.56 m²;
- is no more than 3.0 m in height; and
- is displayed only during construction.

This section of the Sign By-law allows promoters to paste flyers for live music events on construction hoardings throughout Vancouver without a permit. The main poster companies in Vancouver are [The Poster Guy](#) and [LiveNation](#), while [Silver Fox Postering](#) also takes on some, but significantly fewer, postering contracts.

Window Signs

Figure E.5 Example of window signs in Vancouver

Section 6.18 “Window Signs” of the Vancouver Sign By-law allows promoters to put flyers for live music events in store windows without a permit. The by-law states that a sign permit is not required for an advertisement in a window that:



³⁵⁸ <http://bylaws.vancouver.ca/Sign/Part6.pdf>

- is in any sign district, except the Residential Sign District;
- is not illuminated, except for an electronic message sign;
- is an electronic message sign that:
 - (i) is limited to one sign on the premises,
 - (ii) has a copy area no greater than 0.34 m², and
 - (iii) does not display flashing, scrolling or other visual effects;
- if located on the first storey of a building, has a combined sign area for all signs no greater than 30% of the total area of contiguous glass, or glass panes separated by mullions, contained within a window frame; and
- if located on the second storey of a building, has a combined sign area no greater than 10% of the total area of contiguous glass, or glass panes separated by mullions, contained within a window frame.

Projecting An Image/Advertisement

Figure E.6 Example of projected advertisement

Under Section 6.14 “Projected Image Signs” of the Vancouver Sign By-law, a sign permit is not required to project an image or advertisement on private property that:



- is in any sign district, except in the Residential and West End Sign Districts;
- advertises community events, campaigns held or sponsored by a charitable or community organization, or events associated with a cultural, institutional or recreational use;
- is limited to one sign on a site;
- has a sign area no greater than 12 m²;
- displays a static image that does not change for at least 10 seconds;
- transitions between images within 0.5 seconds;
- is projected for no more than 5 continuous days and no more than 10 days in a calendar year; and
- is turned off between the hours of 11 p.m. and 7 a.m.

Floating Signs

Figure E.7 Example of floating sign

Section 6.1 of the Vancouver Sign By-law defines a “Floating Sign” as a non-illuminated sign mounted on or affixed to a barge, vessel or other structure that floats or is capable of floating on water.³⁵⁹



This presents a unique advertising opportunity for live music event promoters, since under Section 6.10 “Floating Signs” of the Vancouver Sign By-law, a sign permit is not required for a floating sign that:

- has a sign area no greater than 1.0 m²;
- may include third party advertising; and
- is limited to one per barge, vessel or other structure.

III. Billboard Permit

Under the Sign Bylaw, all billboards in Vancouver require permits.³⁶⁰

If you want to light your billboard, an electrical permit is also required. You can apply for the electrical permit at the same time as the awning permit. These are filed through the Department of Buildings, Services, and Licensing.

Billboard permit application requirements:

- A completed application form³⁶¹ and the \$694 billboard permit application fee
- Two (2) sets of drawings, to scale

The information sheet has the specific requirements for these drawings.

The City may require additional information if an application is made for a permit for these types of signs:

- Free-standing signs

³⁵⁹ <http://bylaws.vancouver.ca/Sign/Part1.pdf>

³⁶⁰ <http://vancouver.ca/doing-business/billboard-permit.aspx>

³⁶¹ <http://vancouver.ca/files/cov/billboard-permit-app.pdf>

- Signs weighing more than 200 lbs (91 kg) including the combined weight of the channel letters
- Any other signs where City staff are concerned with the structural integrity of the sign

Pattison Outdoor Advertising and Outfront Media own the majority of billboards in Vancouver.

IV. Vancouver Live! Video Screen Advertising Program for Non-profits

The Vancouver Live! Video Screen Advertising Program³⁶² offers access to free airtime on a video billboard for non-profit arts and culture organizations. The organizations are responsible for arranging the production of the video, and the City provides a place for it to show.

This is a grant programme for Vancouver-based, non-profit, arts or culture organizations. Sports or fitness organizations, educational, political or religious organizations, and community service organizations are ineligible.

This programme runs on a pair of outdoor video screens, installed on the facade of a commercial building located at the north-east corner of Robson and Granville in downtown Vancouver. One screen faces west, the other faces south. The screens measure approximately 20 x 15 feet (approximately 6.1 x 4.6 metres) each, and are capable of full-colour, and full-motion display. At full capacity, a total of 2.4 hours per day is available which is broken into a repeating 2-minute promotional loop. The remaining broadcast time is devoted to commercial advertising controlled by the owner.

The loop is anticipated to run approximately:

- 72 times a day / 3 times per hour
- An ad running as a part of Vancouver Live! will be shown approximately 144 times a day.

This programme is a partnership between the City of Vancouver and Tourism Vancouver. The screens are owned by Bonnis Properties, and operated by CoreVision Media.

³⁶² <http://vancouver.ca/people-programs/video-screen-advertising-program.aspx>

While the industry standard is a 2-week run, an organization may request up to eight. On average, organizations can expect to be allocated four weeks.

Interested organizations have to submit an application to Vancouver's Cultural Services Department. Deadlines for requests occur monthly and are accepted on an on-going basis year-round. Organizations may place a request up to eight calendar months in advance of the desired airtime.

V. Transit Shelter Advertising Program

The City of Vancouver, through the Transit Shelter Advertising Program,³⁶³ offers free access to transit shelter advertising space for non-profit arts and culture organizations. The organizations pay for and arrange the posters and the City of Vancouver's Cultural Services Department provides them with space at transit shelters allotted by Outfront Media.

A request for this space is made via email to a coordinator at the Cultural Services Department. Deadlines occur monthly and are generally four calendar months in advance.

Outfront Media provides the advertising space as part of its contract with the City. The advertising spaces are allotted throughout the city of Vancouver by Outfront Media on a continually changing basis (not dedicated spaces). Generally, it is not possible to request specific locations or areas.

Eligibility:

A Vancouver-based, non-profit, arts or culture or community service organization that provides programming, activities or services that are:

- Open to the public
- Publicized city-wide
- Held within the City of Vancouver itself

Projects should:

- Provide programme information
- Raise awareness of a service being provided
- Raise awareness of charitable activities

³⁶³ <http://vancouver.ca/people-programs/transit-shelter-advertising-program.aspx>

Programme Priorities

- Arts and cultural organizations have priority over non-arts organizations
- Organizations funded by the City of Vancouver will receive priority over other non-profit arts or cultural organizations
- Applications from community service organizations will receive consideration after applications from arts and cultural organizations have been accommodated
- Civic departments and branches occasionally use the spaces for important public service announcements and may have priority over all others
- Campaigns which have a specific time frame, show, or event associated with them will be given priority over general awareness or informational campaigns
- Campaigns of less than four weeks will be given a lower priority due to the operational processes of this program

An organization may apply for up to 20 faces in transit shelters to run for a period of up to 6 weeks.

VI. Advertising in Transit

TransLink is Vancouver's regional transit service provider, operating across 22 municipalities.

Outfront Media is partnered with JC Decaux as the exclusive provider of Street Furniture advertising within the City of Vancouver until 2023. This includes Transit Shelters and Map Stands. Each Vancouver neighbourhood has a customized design that has been developed through its local BIA.

Key TransLink Advertising Policies³⁶⁴ relating to music and events:

- Advertisements which convey information about a meeting, gathering or event must contain the name of the sponsoring group, the name of the persons participating in the event, and the location, date and time of the event
- No advertisement will be accepted which TransLink, in the exercise of its sole discretion, considers to be of questionable taste or in any way offensive in the style, content or method of presentation

³⁶⁴

https://www.translink.ca/-/media/Documents/about_translink/doing_business_with_translink/advertising/translink_advertising_policy.pdf?la=en&hash=F39F3FD7D46E407ED7288DCDF714CEF41CE7F156

- No advertisements will be accepted which promotes any tobacco company, tobacco product or tobacco brand promotions, including sponsorship or promotion of cultural or sporting events

Billboards

TransLink has 27 billboards across the region, managed by Pattison Outdoor Advertising.³⁶⁵

Next Bus SMS Service

Text ads can be placed in automated SMS responses to bus users via the Next Bus SMS. This service is available throughout TransLink's bus network, including over 8,300 stops and 242 routes. The service also offers geotargeting capability to its advertisers.

Advertising opportunities on TransLink's Next Bus SMS system are available through Irvnet Next Bus real-time SMS.³⁶⁶

Interiors and exteriors of TransLink Buses, SkyTrains, and SeaBuses

TransLink's advertising media, as well as the promotion, distribution of goods, and/or services on TransLink owned vehicles and properties are managed by Lamar Advertising Company.

³⁶⁵ <http://www.pattisonoutdoor.com/>

³⁶⁶ <http://nexttext.ivrnet.com>

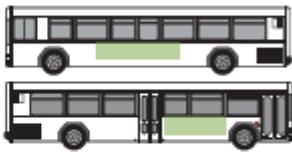
Figure E.8 Advertising in Vancouver transit

LAMAR | VANCOUVER | 4 WEEK BUS SPACE RATES

DETAILS

- All rates are net.
- Rates listed are per 4 week period and represent space only.
- Minimum media space requirements do apply.
- FREE production for 52 week campaigns. Initial display(s) only.
- Lamar is required to do all signature product production.
- For campaigns under 52 weeks, contact your Lamar Account Manager for production costs and any applicable installation fees.
- Foil, reflective, exotic vinyl, extensions and other embellishments are available at additional cost.
- Guaranteed rear placement of seventy (21" x 70") displays is subject to a 50% premium charge and availability of space.
- Please contact your Lamar account manager to verify display size, availability and art/production and minimum media space requirements.
- Rates are subject to change without notice. Specific placement premiums may apply. Icons are for reference only.
- * Product requires a minimum 8 week campaign buy.

TRADITIONAL PRODUCTS

product	# units	rate	
KING 30" x 130"	1	\$800	
KING W/ HEADLINER	1	\$1,020	
70s 21" x 70"	1	\$480	
INTERIOR CARDS 11" x 35"	min. 50	\$32 each	

SIGNATURE PRODUCTS

product	# units	rate	
SUPER TAIL	1	\$800	
* FULLBACK	1	\$1,180	
SUPER KING	1	\$960	
SUPER KING W/ HEADLINER	1	\$1,180	
DOUBLE KONG W/ HEADLINER	1	\$2,000	
* FULL WRAP (no window coverage)	1	\$6,200	
* ARTICULATED FULL WRAP (no window coverage)	1	\$8,800	

Inside transit stations

Advertising opportunities that exist inside transit stations include:

- Platform poster panels
- Platform digital ads
- Station floor murals and decals
- Station wall murals
- Vertical interior poster
- Product service sampling
- Newspaper corrals

Bike Parking

Figure E.9 Example of bike parking advertising (1)



Advertising at bicycle parking locations is managed by C-Media Outdoor.³⁶⁷ There are advertising opportunities at the following bike parking locations:

- Bike Parkades: Indoor facility for registered customers with multiple bike racks inside. Available at Main Street-Science World, King George, and Joyce-Collingwood stations.
- Bike Lockers: Reserved locker for your bike. Available at most SkyTrain stations and some bus exchanges.
 - Located at various Skytrain Stations and Bus Loops throughout the Lower Mainland.

Rates are listed per month per face.

- 2 Months \$395
- 4 Months \$375
- 6 Months \$350
- * 1st TSA sized Horizontal Ad Face. Graphic design extra.
- * Production and Installation charges are extra.
- Bike Racks: Standard outdoor racks for locking your bike up. Available at all SkyTrain stations and most bus exchanges.
 - Municipalities / Skytrain Stations. Rates are listed per month per face:

³⁶⁷ <https://cmediaoutdoor.com/>

- 3 Months \$100/month
- 6 Months \$85/month
- 12 Months \$70/month
- * 1st TSA sized Horizontal Ad Face. Graphic design extra.
- * Production and Installation charges are extra.

Figure E.10 Example of bike parking advertising (2)



Appendix F

Available grants and funding for music and culture in Vancouver and British Columbia

Table F.1 Available grants and funding for music and culture in Vancouver and British Columbia

GRANTS/FUNDING FOR CULTURE AND MUSIC IN VANCOUVER AND BC					
WHERE?	NAME OF GRANT	WHO CAN APPLY	WHAT THEY GRANT	AVAILABLE BUDGET	LINK
ALL OF CANADA	Artist Development	-Songwriters -General artist	Artist development for sound recording, touring and showcasing, video production, marketing and promotion	CAD \$2000	https://www.factor.ca/programs/artist-development/
	Collective Initiatives	Canadian corporations, associations and non-profit organizations with an approved applicant profile can apply.	Collective Initiatives - to finance music industry events, showcases & productions that have a collective benefit for the music industry	Maximum CAD \$100,000	https://www.factor.ca/programs/collective-initiatives/
	Comprehensive Artist	-Unsigned artists -Canadian record labels of all ratings	Contribution to the cost of acquiring, producing and marketing full-length album	Maximum CAD \$80,000	https://www.factor.ca/programs/comprehensive-artist/
	Comprehensive Music Company	-Record labels with FACTOR rating 2, 3 and 4	Contribution to the cost of acquiring, producing and marketing a full-length album	Maximum CAD \$85,000	https://www.factor.ca/programs/comprehensive-music-company-2/
	Juried Sound Recording	- General artists - Record labels - Unsigned artists	Contribution towards acquiring, producing and marketing a full length album	Maximum CAD \$50,000	https://www.factor.ca/programs/juried-sound-recording/
	Live Performance	- All approved artists can apply for showcase support - Artists with	Subsidy for the cost of domestic and international performances including showcases and tours	Maximum CAD \$37,500	https://www.factor.ca/programs/live-performance/

		FACTOR rating 2 or 3 can apply for tour			
	Video Program	- Canadian artists with rating 2 or 3	Contributes to the cost of producing music videos	Max. CAD \$20,000	https://www.factor.ca/programs/video/
	Marketing and promotion for non-FACTOR funded sound recordings	- Artists - Record labels	Supports marketing of commercially released full-length sound recordings not acquired or funded by FACTOR	Maximum of CAD \$20,000	https://www.factor.ca/programs/marketing-and-promotion-for-non-factor-funded-sound-recordings/
	Songwriter's workshop	- Canadian songwriter	Towards cost of attending domestic and international songwriting workshops and seminars	Maximum of CAD \$750	https://www.factor.ca/programs/songwriters-workshop/
	Sponsorship	- Canadian owned and controlled companies	Music projects needing smaller amount of support, or don't fit other available programs	Unspecified	https://www.factor.ca/programs/sponsorship/
	Support for Eligible Music Companies	- Artist managers - Music distributors - Record labels - Music publishers	Funding for business development initiatives that support the marketing and promotion of a company	Maximum CAD \$20,000	https://www.factor.ca/programs/support-eligible-music-companies/
	Explore and Create: Professional Development for Artists (incl. Music)	Individual and groups of artists and curators across the arts	Support for professional development activities and career advancement	Up to CAD \$10,000	http://canadacouncil.ca/funding/grants/explore-and-create/professional-development-for-artists
	Research and Create Program	Individual and groups of artists and arts organizations	Support for the initial stages of the creative process: Creative research, Creation, Project development, incl. residencies	Up to CAD \$25 000 (to a maximum of \$50 000 over 2 years)	http://canadacouncil.ca/funding/grants/explore-and-create/research-and-creation
	Artist Driven Organizations Program	Artistic organizations	Funds to contribute towards: - artistic development	Up to 60% of total annual	http://canadacouncil.ca/funding/grants/explore-and-create/conc

			<ul style="list-style-type: none"> - creative research - creation - production -dissemination 	revenues, (average of last 3 years)	ept-to-realization
	Artistic Catalysts	Artistic organizations	Grants support: <ul style="list-style-type: none"> -development and promotion of artistic programming -artistic practice, other art forms and the Canadian arts sector -build public outreach 	Up to 50% of total annual revenues, (average of last 3 years)	http://canadacouncil.ca/funding/grants/engage-and-sustain/artistic-catalysts
	Creating, Knowing and Sharing Program (Arts and Cultures of First Nations, Inuit and Métis Peoples)	First Nations, Inuit and Métis artists, groups, and organizations	Grants for: <ul style="list-style-type: none"> -travel -small-scale activities -short and long-term projects 	<ul style="list-style-type: none"> - Travel: up to CAD Up to \$30 000 - Small-scale: up to CAD \$3,000 - Short projects: up to CAD \$100,000 - Long-term projects: up to CAD \$300,000 	http://canadacouncil.ca/funding/grants/creating-knowing-sharing
	Professional Development for Arts Professionals of Supporting Artistic Practice	<ul style="list-style-type: none"> - Arts professionals - Cultural connectors and sector builders 	Development and networking activities incl. Mentorships, workshops, trainings, conference participation	Up to CAD \$10 000	http://canadacouncil.ca/funding/grants/supporting-artistic-practice/professional-development-for-arts-professionals
	Sector Innovation and Development	<ul style="list-style-type: none"> - Sector builders - Agencies and management service organizations - Artistic collectives - Artistic organizations - Festivals, presenters and touring networks - Book and magazine publishers 	Planning, development and/or implementation of projects, e.g: <ul style="list-style-type: none"> -Representation or management services for a stable roster of 3 or more Canadian artists -Production services -Sector research -Conference organization 	Projects: up to CAD \$100,000 Composites: up to CAD 100,000 per year (to a maximum of \$300,000 over 3 years)	http://canadacouncil.ca/funding/grants/supporting-artistic-practice/sector-innovation-and-development

	Arts Across Canada: Travel Program	<ul style="list-style-type: none"> - Artists - Arts professionals - Equity arts sector - Artistic groups and collectives - Artistic organizations - Festivals, presenters and touring networks 	<p>Travel activities, e.g:</p> <ul style="list-style-type: none"> - development markets and networks (including participation in official showcases) - participation in significant events - exploration of future artistic collaborations 	Up to CAD \$30,000	http://canadacouncil.ca/funding/grants/arts-across-canada/travel
	Arts Abroad: Travel Program	<ul style="list-style-type: none"> -Artists and curators -Arts professionals -Equity arts sector -Artistic groups, collectives and organizations 	Support to attend significant events outside of Canada and build international presence	Up to CAD \$30,000	http://canadacouncil.ca/funding/grants/arts-abroad/travel
	Arts Across Canada: Representation & Promotion Program	<ul style="list-style-type: none"> -Support groups, organizations and shared platforms -Artist-run centres -Agencies, management service organizations 	Travel within Canada, at least 300 km away to formally represent and promote Canadian artists (i.e. through a contractual relationship) build on an existing tour (for artists' representatives only)	Up to CAD \$30,000	http://canadacouncil.ca/funding/grants/arts-across-canada/representation-and-promotion
	Arts Across Canada: Circulation and Touring	<ul style="list-style-type: none"> -Artists and curators -Artistic groups, collectives, organizations - First Nations artists, collectives and NPOs 	<ul style="list-style-type: none"> -Circulation or touring of artists to 3 or more consecutive Canadian destinations -Cross-border Canada/USA tours (majority of events in Canada) -Self-presentation and touring to fewer than 3 consecutive Canadian destinations, if strong market development rationale or outreach strategy 	Up to 50% of eligible costs, to a max. of CAD \$200,000	http://canadacouncil.ca/funding/grants/arts-across-canada/circulation-and-touring
	Arts Festivals and Presenters	Festivals, presenters and touring networks	Grants support festivals and presenters to showcase important	Up to 60% annual revenues,	http://canadacouncil.ca/funding/grants/arts-across-canada/arts-f

		(incl.music)	artistic work, strengthen artistic practice, and build bridges between artists and audiences.	(averaged over last 3 years)	festivals-and-presenters
	Arts Abroad	Festivals, presenters and touring networks (incl.music)	- Grants for registered or incorporated Canadian arts organizations to represent Canadian artists and develop their presence internationally- Grants for foreign arts organizations that invite Canadian artists to present artistic works and to Canadian arts organizations that bring international buyers to Canada.	Up to CAD \$30,000	http://canadacouncil.ca/funding/grants/arts-abroad/representation-and-promotion
	Arts Abroad: Residencies	- Artists and curators - Arts professionals - Artistic groups, collectives and organizations	Funding residencies between 1 week and 6 months	Up to CAD \$20,000	http://canadacouncil.ca/funding/grants/arts-abroad/residencies
	Arts Abroad: Co-productions	- Artists and curators - Arts professionals - Artistic groups, collectives and organizations	Funding artistic co-productions of new works in collaboration with foreign arts organizations, which result in a public presentation	Up to 50% of eligible costs, to a maximum of CAD \$50,000	http://canadacouncil.ca/funding/grants/arts-abroad/co-productions
	SOCAN: Travel Assistance	SOCAN member composers, writers, and music publishers	Contribution toward travel-related costs for career-building or career-defining activities in Canada or abroad	CAD \$400 - \$1,000	https://www.socanfoundation.ca/grants/
	SOCAN: Professional Development Assistance	SOCAN member composers, writers and music publishers	Grants for upgrading skills and knowledge or acquiring new skills and knowledge to advance their careers	Up to CAD \$1,500	https://www.socanfoundation.ca/grants/
	SOCAN: Work	Individuals,	Grants assisting the	Grant	https://www.socanfoundation.ca/grants/

	Commissioning Assistance	corporations, performers, ensembles, and presenters	commissioning of SOCAN members to create new works in all genres of music	matching previously raised funding of CAD \$1000 - \$3000	ndation.ca/grants/
	Radio Starmaker Fund	<ul style="list-style-type: none"> - Canadian artists/acts with a sales track record - Canadian independent record labels - Canadian artist management 	The fund supports marketing and promotional initiatives related to eligible Canadian music recordings, including radio advertising, to help develop Canadian artists into stars	Total fund over CAD \$42m to be distributed over “next few years”	https://www.starmaker.ca/about
BRITISH COLUMBIA	Amplify BC	<ul style="list-style-type: none"> - Artists at various career stages - Music businesses - Music tourism projects 	New province music fund with 4 specific programs: <ul style="list-style-type: none"> - Music industry development - Career development - Live music - Music company development 	Total budget: CAD \$7.5m	https://www.creativebc.com/programs/amplify-bc
CITY OF VANCOUVER	Cultural Grants (Project, Annual Assistance, Operating)	-Vancouver-based cultural organizations and NPOs across various disciplines (incl. music)	<ul style="list-style-type: none"> - Project grants to support projects and events - Annual assistance for orgs in growth - Operating grants for mature organizations 	Amount distributed in 2018: CAD \$4,842,650 to 129 organizations	http://vancouver.ca/people-programs/cultural-grants-program.aspx
	Permit Fee Assistance for Cultural Spaces	<ul style="list-style-type: none"> -Vancouver-based NPOs with an arts and culture mandate - Own space or have a secure rental tenancy - Project not already receiving a Cultural Infrastructure Grant 	Offset of development and building permit fees for cultural space projects (incl. music)	Individual grants of up to CAD \$1,500, total annual budget CAD \$10,000	http://vancouver.ca/people-programs/permit-fee-assistance-for-cultural-spaces.aspx
	Creative Spark Grants for Emerging Artists	<ul style="list-style-type: none"> - Emerging artists - Project to 	Grant funds intended to cover artist fees, project materials and	100% coverage for	https://artstarts.com/creativesparkvancouver

		engage young people (ages 5-24) and focus on arts-based learning in any artistic discipline (incl. music)	supplies, rentals and honoraria.	projects, up to CAD \$2,000	
	Cultural Infrastructure Grant Program	<ul style="list-style-type: none"> - Vancouver based NPO, active for <2 years - Clear arts focus in their mandate 	<p>Grant intended to:</p> <ul style="list-style-type: none"> - Plan or undertake feasibility studies for future capital projects - Complete capital projects - Buy, build, renovate, or expand a cultural facility 	<p>Up to 50% of total project costs:</p> <ul style="list-style-type: none"> - Planning projects - up to CAD \$50,000 - Minor Capital Improvements - up to CAD \$50,000 - Major Capital Improvements - up to CAD \$250,000 	http://vancouver.ca/people-programs/cultural-infrastructure-grant-program.aspx
	Artist Studio Award Program (2018-2021)	<ul style="list-style-type: none"> - Professional artists with annual income of up to CAD \$45,000 	Support low-income, emerging professional artists working in any artistic discipline (incl. music)	5 live-work and 2 work-only studios available for up to 3 years	http://vancouver.ca/people-programs/artist-studio-award-program.aspx
	Community Arts Grants	<ul style="list-style-type: none"> - Festivals, celebrations, and major parades - Community arts projects - Artist residency within a neighbourhood or community 	Grant intended for for planning, running, or promoting events or projects.	Grants from CAD \$1,000 up to \$10,000 Total budget allocated in 2017: CAD \$428,768	http://vancouver.ca/people-programs/community-arts-grant-program.aspx

Appendix G

Survey questions

*Questions with an asterisk include a text box to be completed and the options N/A, Refusal and Do not know

In what capacity are you answering this survey?

If you are answering for a music company you will be asked questions about your company's operations (eg, revenue, expenses, employment, etc.).

An artist/musician

A music company (owner of the company/responding for the company)

A music professional or freelancer (not responding on behalf of a company)

A member of the public

Where are you or your music company located?

In Vancouver

In BC (outside Vancouver)

Outside of BC

Which of the following roles best describes how you interact with music?

What else do you do in music?

Music Venue

Music Video/Content Creator

Music Festival

Music Retail/Repair

Music Manager/Artist Manager

Music Educator/Instructor

Music Promoter

Music Therapist

Record Label Music School

Music Recording/Mastering Studio

Music Association, Union or Guild

Music Broadcaster / Radio / Media

Government Department (involving music)

Music Publishing Company

Music Journalist
Radio Promoter
Sound Engineer
Publicist
Music Technology Company
Booking Agent
Other
Social Media Marketer (in music)

A1. What is your name?*

A2. What is your email address?

A3. With what gender do you most identify?

Female
Male
Two-spirited
Non-binary
None of the above
Prefer not to answer

A3. What is the name of your company?*

A4. In what year were you born?*

A5. Where were you born?

In Vancouver
In BC (outside Vancouver)
In Canada (outside BC)
Outside of Canada

A6. What is your postal code?*

A7. How would you best identify your background?

Western European / British Isles
Black
Eastern European
Arab
Chinese

Latin American
South Asian
West Asian
Aboriginal/Indigenous
Korean
Filipino
Japanese
Southeast Asian
More than one of the above

A4. Please provide the street address of your company, including your postal code.*

A5. Which term best describes your company?

For profit company (including partnerships and sole proprietorships)
Non-profit company
Registered charity
None of the above

A6. Where are the owners of your company located?

In Vancouver
British Columbia
Elsewhere in Canada (outside BC)
Outside of Canada
I don't know

A7. Do any of your music company's owners identify as:

Female
Visible minority
Persons with disabilities
LGBTQ++
Aboriginal (First Nations, Metis or Inuit)

B1. Using the dropdown list below, please indicate how much revenue your company generated in its last fiscal year.

B1a. How has your company's revenue changed compared to last year? How do you expect it to change over the next year (12 months)?*

B2. In your company's last fiscal year, what portion (%) of your revenue was generated by music-related activities?*

B3. What portion (%) of your company's music-related revenue was generated by Canadian artists?*

B4. How much did your music company spend in its last fiscal year?

B4a. What portion (%) of your company's annual expenses are spent on BC-based labour (full time, part time, and freelance/contract)?*

B4b. What portion (%) of your company's annual expenses are spent on programming (eg, booking shows, paying artists, etc.)?*

B5. How many people does your company employ in the following categories?

Full time, regular salaried employees

Part-time regular salaried employees

Temporary employees (average monthly count)

Contract/freelance employees (average monthly count)

B5a. How has your company's headcount changed compared to last year? How do you expect it to change over the next year (12 months)?

B5b. What is the average salary of your full time employees?

B6. How many individual volunteers does your company use?*

B6a. What do those volunteers do for your company?

Admissions (ticketing, collecting cover charges, etc.)

Venue/event logistics (coat check security etc)

Technical support (lighting, sound, recording, mixing/mastering, etc.)

Backstage support (stage management, green room preparation, catering, etc.)

Transportation and equipment load-in/out

Unbilled on-stage entertainment (hosts/emcees, DJs, comedians, etc.)

Booking and event planning

Event promotion (flyering, postering, social media, etc.)

Artist management and tour planning

Graphic design (flyers, posters, merchandise development, stage props, etc.)

Web design (website, social media, e-commerce, etc.)

Merchandise sales
Information, inquiries, or other general customer service functions
Fundraising
Governance (board members)

B7. Which of the following tools do you use to promote your company's music-related activities?

Local radio ads
Local newspaper ads
Facebook ads
Twitter promotion
Instagram promotion
Other social media
Email newsletters
Word of mouth
Physical signage
Blog(s)
Event pages
Pitching to media / press interviews
Other
None of the above

B7a. How do you people or clients find out about your company's activities?*

B1. How much did you earn from all sources last year?

Live Music/Touring
Recorded Music Sales\
Composing/Sync
Other Income from Music
Non Music Income

B2. How has your income changed compared to last year? How do you expect it to change over the next year (12 months)?

Change from last year
Expected change next year

**B3. Other than the income you earn as a musician, how else do you make a living?
Select all that apply.**

I teach music
I work in a music store
I build or repair music instruments
I work in a live music venue
I work for a music festival
I work in a studio
I work for a music organization
I work for a music label/manager/promoter
I am a music entrepreneur
Jobs outside the music industry (please elaborate)

B4. How many shows/gigs have you played in Vancouver in the last year (12 months)?*

B5. How many hours per week do you spend on your music? This figure includes rehearsal, practice, shows/gigs, and related travel.

B6. Do you have a space where you can rehearse?

Yes, I rent one
Yes, I own one
Yes, I share one
No, I don't need one
No, I can't find one
Other

B6. Have you received any grants for your music?

B6a. From whom have you received any grants?

Canada Council for the Arts
BC Arts Council
Community Arts Council of Vancouver
BC Music Fund/Creative BC
FACTOR
City of Vancouver
Other

B6a. Why not?

Applied but was not successful
Don't know where to apply

Don't know how to apply
Other

B7. Which of the following tools do you use for promotion and/or engaging your fans?

Local radio ads
Local newspaper ads
Facebook ads
Twitter promotion
Instagram promotion
Other social media
Email newsletters
Word of mouth
Physical signage
Blog(s)
Event pages
Pitching to media / press interviews
Other
None of the above

B7a. How do you people or clients find out about your music?*

C1. What would you consider your primary musical genre?

C2. In what other music genre(s) are you active?

Rock
Hip-Hop/Rap
Singer/Songwriter
R&B/Soul
Pop
Metal
Country/Bluegrass
Folk/Roots
Indie/Alternative
World - Traditional
Dance/Electronic
World - Contemporary
Classical
Other
Jazz/Blues

D1. Which of the following best describes your venue?

Purpose-built music venue
Bar/cafe with live music
Retail store with live music
Church or school used in off hours
Informal music space
Casino
Other

D2. What is the capacity of your venue?*

D3. How many shows/events did your venue host in the last 12 months?*

D4. On average, how full is your venue during a typical show/event?*

D4a. How has your venue's fill rate changed compared to last year? How do you expect it to change over the next year (12 months)?

D5. Do you know where those people attending your shows/event are from?

D1. How many individuals came to your festival(s) in the last 12 months?*

D1a. How has your festival's attendance level changed compared to last year? How do you expect it to change over the next year (12 months)?

D1b. Approximately what portion (%) of the attendees of your festival were paid (if you know)?*

D2. How many people can attend your festival(s) in a given year?

If you have more than one festival, please indicate the total aggregated capacity of all your festivals.*

D3. How long is/are your festivals (in days)?

If you have more than one festival, please indicate the total aggregated number of days for all your festivals.*

D4. In which jurisdictions do you market your festival(s)? Select all that apply.

The local community (within a 15 min drive)
Elsewhere in BC (outside my community)
Elsewhere in Canada (outside of BC)
The US
The rest of the world

D5. Do you know where those people attending your festival(s) are from?

D1. Over the last 12 months, how many shows have you booked in BC?*

D1a. How has the number of how you have booked in BC changed compared to last year? How do you expect it to change over the next year (12 months)?

D2. Over the whole year, how many individuals attended those shows? Please include all attendance (eg, including ticketed, cover charge, free/promotional, and pay-what-you-can admissions).*

D3. What portion (%) of the artists/acts that you booked over the last 12 months were local artists?*

D4. Do you have ticketing information for the show you have booked over the last 12 months that would indicate where attendees are from (eg, from a credit card company)?*

T1. What portion (%) of visitors to your shows/event/festival came from the following: Please note that your response should sum to 100%.

Your local community (within a 15 min drive)
Elsewhere in BC
Elsewhere in Canada (outside of BC)
The US
The rest of the world

D1. How many artists do you currently have under management?*

D1a. What portion (%) of those artists are from BC?*

D2. In the last 12 months, how many tours have you managed in which at least one show was played in BC?*

B1. How much income did you earn from music- and non-music-related work in the last 12 months?

B2. How has your income changed compared to last year? How do you expect it to change over the next year (12 months)?

B3. How many hours per week do you spend working in the music industry?

Have you taken any music education or training?

Yes (basic)

Yes (advanced)

Yes (professional)

No

Where did you receive that education/training? Check all the places where you have studied music.

Self-trained

In primary/secondary school in Vancouver

In primary/secondary school outside Vancouver/abroad

In university in Vancouver

In university outside Vancouver/abroad

At a music school/institution in Vancouver

At a music school/institution abroad

At a workshop/s in Vancouver

At a workshop/s abroad

Private lessons

Other

How would you rate the availability of high quality music education in Vancouver?

Very good

Good

Poor

Very poor

Don't know

Have you taken any music industry education or training?

Yes (basic)

Yes (advanced)
Yes (professional)
No

Where did you receive that education/training? Check all the places where you have trained for a role in the music industry.

Self-trained
In university in Vancouver
In university outside Vancouver/abroad
At a music school/institution in Vancouver
At a music school/institution abroad
At a workshop/s in Vancouver
At a workshop/s abroad
Private lessons
Other

How would you rate the availability of music industry education in Vancouver?

Very good
Good
Poor
Very poor
Don't know

E1. In what areas would increased provincial/city government focus have the most impact on you or your company?

Music education grants
Operational or performance grants
Lower administrative burden for existing grants
Support for local venues
Improved bylaws, regulation and/or licensing
Other

E2. How would you rate the availability of suitable venues for emerging artists in your community?

There are more than enough venues
There are enough suitable venues
There are not enough suitable venues

There aren't any venues
Don't Know

E3. What are the best assets and biggest challenges that you encounter in the music industry?

Performance opportunities
Availability of venues
Engaged audiences
Networking opportunities
Reputation of the City
Regulatory/legislative framework
Support for music talent from labels and managers
Availability of funding support
Music education
Affordability of housing
Crossover between other creative industries
Affordability of work and/or rehearsal spaces
Performance fees
Media coverage
Sense of community
Variety of genres
Quality of venues
Local talent
Public transportation
Diversity of the scene
Networking opportunities
Crossover between other creative industries
Reputation of the City
Other

How often do you go to live music performances in Vancouver?

Where do you currently go to music performances in Vancouver? Please list up to 5 names of venues.*

How do you learn about live music performances in Vancouver? Please list up to 5 names of sources/ publications/ websites.*

How much do you spend on music in a typical year?

How (if at all) do you primarily listen to recorded music?

Radio

CD

Vinyl

Streaming Service (Apple Music, Spotify, etc.)

Online (YouTube, SoundCloud etc.)

Live music events

Other

I don't listen to music

What do you feel are the best assets and biggest challenges of Vancouver's music ecosystem?

Ticket prices

Safety in venues

Variety of music offerings

Public transportation

Cost of living in Vancouver

Access to information about music events

Sense of community

Variety of genres

Quality of venues

Local talent

Diversity of the scene

Curfew

Appendix H

Survey responses to open-ended 'Other' question

E1. In what areas would increased provincial/city government focus have the most impact on you or your company?

- support in recording and music distribution
- Booking Agencies, like Seigel Ent, have too much dominance in the Booking realm. They've driven the wages of artists down to \$80-100 for a four hour call. Musicians cannot live on those wages.
- give money outside the "fam": quit oligarchy funding and take a safe risk else more boring
- More \$ for artists
- Raising the minimum wage is priority #1. Without proper wages and liveable housing costs you can't invest in gear or think about what you want to do as a creative person instead of just someone who wants to pay their bills. If you're working 60hrs+ per week you don't have time to make music. After visiting my friends in Australia who make \$20-25 per hour in retail and pay less in rent than me, you can hear the difference in their gear, their recording quality, even in the amount of time that they have to work on their craft.
- encouraging corporate funding through tax benefits
- Funding non-profit all ages venues
- Affordable studio space for development, rehearsal, education, workshops etc. More recording grants! These make a huge difference!
- Support for rehearsal spaces
- every time any night gets busy and successful, the liquor board shuts it down.
- affordability of housing and venues. The absolute number one problem with the arts in Vancouver is that no one can afford to live here to be an artist, fewer and fewer can afford to see shows, and increasingly venues can't afford to operate so there are fewer opportunities for musicians.
- Community grants not requiring non-profit status
- Please consider: Film industry initiative to create funding opportunities or tax incentives for local filmmakers & especially the huge foreign service-productions TV series, to license BC recordings for film / tv & screen-based synch opportunities. Even at a \$500-1000 honorarium level. *So often I get asked to contribute for free to films. OR I have huge opportunities for synch-to-film, based on DEMOS they hear, but can't afford to take the song from a demo stage to delivering a final master to the filmmaker in order to do a deal, and have lost the opportunity. It would be incredible as part of the film / tv series tax incentives if it was mandatory to have a quota of BC music recordings in their synch, & BC composers in their soundtracks in order to pull those tax credits.

- support spaces for musicians to rehearse or make laws so that all the creative/affordable spaces in the city stop getting torn down and turned into shiny and expensive condos.
- Assistance with live/work housing - it is nearly impossible finding a place in Vancouver to live and be allowed to practice
- increasing wages so a full time musician can have a career in the city and limit Doctors, Lawyers, Dentists and students from playing for free just to have fun. This destroys the industry. Perhaps certificates are provided to full time musicians showing 3 years of previous income fulltime music, then all club owners must hire only those players.
- could we look at Agencies bullying out independents at the Vancouver music venue level. They control all the best stages and pay the musicians shit. If you don't comply, you can't get on that stage. How is THAT a fair and just economy, only Booking Agents are benefiting.
- Rental subsidies for jam spaces and housing for artists
- The BC Music Fund grant so far has been great. Funding it more so more artists get music recording, video, and travel grants. Also What is really needed is a rehearsal/performance venue that can be booked for free or very cheap to rehearse in and hold performances at.
- Subsidised housing and rehearsal spaces for artists. Recording and touring grants, as well as showcasing opportunities need to be made available to a more diverse variety of musical styles.
- Easier / less expensive to work in the United States.
- more artist development grants not only for young artists
- More financial support for local journalism/writers
- Support for live music throughout bc
- venue acquisition
- raise awareness of the arts and music in our society
- More opportunities for support
- Artist support grants. eg proof of touring? Rent subsidy. Proof of gigs? Flat low barrier small \$50-100 grant like the CIRAA used to lottery with a show poster as proof. Use City property to open jam spaces. Use tax credits to keep shitty buildings that are used as studios/jam spaces from closing to be replaced by juice bars.
- Reduced Property Tax

What do you feel are the best assets and biggest challenges of Vancouver's music ecosystem?

(Optional adding of open commentary)

- There are a ton of venues but not all of them are quality
- lack of other major centres near Vancouver for regional block-booking and collaborations, as compared to Ontario and Quebec, for example. And distance to other culturally diverse communities (eg Toronto, Montreal) where there is a rich level of activity in the World Music scene and related genres.
- Cost of doing business (property taxes, rent, wages due to high cost of living). Also, high cost of living leaves audiences with little disposable income.
- lack of experience and capacity in funding bodies
- Overall talent pool is extensive which is an asset. On the other end this talent pool is very fluid due to the very limited capacity to make a living in the art and music industry.
- Neighbors of venues take it upon themselves to complain excessively in order to try and close venues in urban areas that have been venues for decades, officials spend too much time listening to them. If you want to live in a large city's downtown, you shouldn't expect to live in a quiet forest situation.
- putting on events in the City of Vancouver
- better promotion and support to local indie music stores. they are often overlooked and provide invaluable support of artists/ ticket sales/ introducing the public to new music. They are often not given the credit or exposure for the role they play in local and international artist development and support
- Creation of a comprehensive live music infrastructure
- Some very good professional musicians, engineers and producers in this city - top tier - in my opinion. This makes the city an excellent place for music work to occur.
- Weather
- lack of local venues to showcase techno (or similar genre) and the lack of opportunities to have local unknown acts perform; also paying musicians, all venues expect free artists
- Promoting general Arts appreciation and awareness needs to be a higher priority in Vancouver. Vancouver seemingly has aspirations to be a world class city. World class cities almost always are recognized for having major arts components. I think this survey needs more places to make comments as the options given are too limited especially in the challenges assets section.
- Vancouver audiences are very fickle, difficult to get people out to shows. Hard to plan because people wait till the very last minute to decide to attend shows.
- audiences educated to realize that quality music requires full time work and is worthy of professional pay - doesn't just happen for free
- This survey is everything wrong with the music industry

- unsure at this point
- Getting into close geographical markets in the US. That P2 needs to be easier to get.
- Venue & Promotion staff expect bands to promote. Pay to play. Dwindling population. Real Estate values of venue/rehearsal/living land = evictions. Poor live shows of local indie bands that do not make attempt to engage audience.
- Geographic isolation. NAFTA imbalance
- Access to product
- Event attendance
- Lack of others doing similar things.
- City seems to be mainly supporting pop, rock and other mainstream genres. Vancouver has a wealth of talent in a much more diverse variety of genres. By supporting these artists, in jazz, folk, classical, contemporary and world music, Vancouver's reputation and the success of its artists will increase.
- this should be 0-10, not one or the other
- survey is a bit uninformed and hopefully its not taking a lot of music capital away from musicians. There are a handful of things that could be easy fixes to allow musicians to earn a proper income in this city but on ears to listen or authority to act on it. Maybe the best thing is to Lobby that music should be seen as a medical product as we all know we cannot live without it. Get that approved and we will all make good money.
- Regulatory framework -- lack of dancing. Liquor licensing limitations. Note: When it comes to reputation of the city and talent, these two are enormous contributors to why we see limited retention of promising Vancouver-based artists.
- BC record grants
- liquor and noise bylaws making small venues not viable. need a small live venue zone with exemptions - so many cities have this and it changes everything. Hogan's Alley reborn post-viaduct?
- Netflix
- Not sure
- Music Education in Vancouver Elementary schools was eliminated. This should be reinstated.
- Continued education, subsidized workshops, mentorship.
- Sexism, both overt and subtle. Yeah, #metoo happened, but everything didn't get magically fixed overnight. There's still a lot of work to be done.
- Touring Destinations within reasonable drive
- Talent
- Not being able to cover the cost in parking downtown with show revenue
- Support for Artist Development
- access to venues for loading gear... without a ticket
- Recording studios
- Simply an underdeveloped infrastructure, that results in the same acts getting the same opportunities constantly

- everyone in the scenes that i'm a part of are so industrious and make so much of so little (so little venues, so little funding)
- Not enough all ages venues
- Vancouver's music scene is so sexist and gross. It forces women OUT of music
- Balancing the need to make a living, support a family etc, with the time and devotion and resources required to produce ones best creative work.
- Cost of living.
- Police/city regulators shutting down diy venues, many venues trying to have any live performance over by 10 to hustle in a dance crowd. No support for non commercial music. Radio that just plays the same tired can con stand bys and pays no attention to contemporary local talent. Insanely bureaucratic grant application process (particularly for factor) that is heavily weighted towards bands with major label support (ie:bands that already have money/resources).

