Staying in Tune: A Study of the Music Industry Labour Market in British Columbia

October 2018

Adam Kane *Productions*

The Deetken Group

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Project Overview

Drawing on the findings from consultations (i.e. on-line surveys, interviews and a focus group) with more than 400 BC music industry and other relevant stakeholders, extensive analysis of secondary data and a thorough review of relevant literature and industry reports, this report offers insights into BC's music labour market. It concludes by presenting ideas that could make opportunities across the industry more accessible to a broader group of industry stakeholders and that may help support and develop the industry's talent base. In short, this report aims to help BC's vibrant music industry to *stay in tune* by ensuring that BC-based music professionals and the businesses that rely on their services are able to reach their full potential in the province and beyond.

Scope

This report scopes the industry in three ways. First, it focuses on the commercial music industry, that is, music that generates revenue. Secondly, it divides the industry into music professionals and music businesses. Finally, it organizes music professionals into three occupational clusters, which are referred to as primary creators, secondary creators and representatives and which are described here:

- **Primary creators** are music professionals that generate income from creating or contributing to the creation of music.
- **Secondary creators** generate income by using the content developed by primary creators to create new content (e.g. a music video, a podcast, a blog post about a music festival, etc).
- **Representatives** represent and/or monetize the content created by primary and secondary creators.

Approach

This report uses a combination of quantitative and qualitative research methods and draws on both secondary and primary data to address the research questions. In addition to analysis of secondary data, the report draws on insights from:

- **376** survey responses
- **40** resources
- **20** scoping interviews with industry experts
- **10** semi-structured interviews with innovation companies across the province
- **9** music professional focus group participants
- **8** semi-structured interviews with music businesses

Key findings

What’s at stake?

- Evidence suggests that there is a link between the health of a city’s music scene and the ability of their companies to attract and retain innovative and creative talent.

Size and characteristics of the workforce

- As many as 13,400 people earn at least some of their income through their music-related work. Of these, up to 6,600 people identify their work in the music industry as their main form of employment.
- Music professionals across all three occupational clusters earned $46,000 a year, less than BC’s median annual income (i.e. $54,000 a year). However, there was significant variation across the industry with primary creators earning less than half as much as secondary creators and representatives.
- Over 80% of people perform multiple roles in the industry.
- Most (79%) people in the industry are self-employed.
- The music industry workforce in BC includes a lower proportion of women, people who self-identify as Indigenous and visible minorities than the provincial economy.

Paid opportunities in the industry

- Overall growth in employment in the music industry in BC was slightly higher than employment growth in the overall provincial economy but there is variation across occupational clusters. Between 2011 and 2016, employment growth in the music industry was largely driven by a rise in employment among secondary creators with primary creators experiencing negative growth and representatives experiencing slow growth during this period.
- There is evidence to suggest that industry-wide opportunities have increased recently for a portion of music professionals and the businesses that rely on their services.

Potential risks

- Yet, despite these recent signs of growth, compensation for paid work is a concern.
- There is a risk that a portion of music professionals will exit the industry altogether (an estimated 24%) or leave BC to pursue their careers elsewhere (an estimated 8%).
- In addition, despite reporting recent increases in revenue and a general optimism about future growth potential, more than a fifth (22%) of music businesses anticipate re-locating outside of BC.

Barriers to entry and advancement

- About 90% of music professionals reported experiencing some type of barrier that has made it difficult for them to enter the industry or advance in their careers with the most commonly cited barrier relating to lack of industry connections (“I don’t know the ‘right people’; don’t have industry connections”).
- Just under a third of music professionals (32%) reported experiencing discrimination, primarily based on sex, age, and race and ethnicity.

- These findings point to the importance of identifying and providing support for pathways into and through the industry and of ensuring that these pathways are accessible across the industry.

Career pathways

- High school and post-secondary education and training provide important pathways into the industry.
- Internships and work placements provide key opportunities to enter and become established in the industry. However, a majority (80%) of music professionals have not participated in an internship or work placement, primarily due to a lack of access or exposure to relevant opportunities.
- Mentorship can also provide a key support to music professionals as they enter and move through the industry. However, only a third of music professionals currently have a mentor and most of the people who do not have a mentor would like one.
- Most (95%) music professionals would like to refine or develop their skills in order to succeed in an ever-changing industry. In addition, most music businesses (75%) observe some kind of skills gap in the workforce.
- In addition, most (80%) of music businesses identified the need for professional development skills or other support programs to help them grow their businesses.
- Despite existing supports, there continues to be a demand for skills development from both music professionals and music businesses, particularly those living in communities outside of Vancouver.

Ideas for moving forward

This report presents a number of preliminary ideas for moving forward. These preliminary ideas represent a mix of insights emerging from the analysis conducted for this report but, principally, they reflect the priorities identified by the hundreds of music professionals, music businesses and other stakeholders that were consulted throughout its preparation. These ideas have not been subjected to a rigorous feasibility assessment, nor have they been considered within the context of a broader review of existing initiatives. Instead, they are presented as ideas that merit further exploration. They are organized around two broad themes: 1) Make opportunities across the industry more accessible; and 2) Continue to support and develop the industry's talent base.

1. **Make opportunities across the industry more accessible**

- Increase the participation of women, Indigenous people and visible minorities in occupations across the industry.
- Make grant opportunities more accessible to a wider range of potential participants.
- Create an online platform to share knowledge and information about paid work and collaboration opportunities across the industry in BC.
- Create more opportunities for internship and work placements across the industry
- Continue to support networking across the industry, including in communities outside of Vancouver
- Create structured mentorship opportunities for both professionals and businesses
- Broaden skills development opportunities for both professionals and businesses across the province

2. **Continue to support and develop the industry's talent base**

- Create more opportunities for collaboration between the innovation companies and the music industry across the province
- Create more opportunities for collaboration with "sibling" creative industries
- Promote BC music talent at home and abroad
- Create more opportunities for BC artists to support international acts
- Establish music incubators in urban centres across the province

2. Introduction

Many of us interact with music everyday. Music inspires us to create, to connect, to heal, to reflect and to reminisce – whether at home, at work, while we commute, exercise or shop and even during major life events such as births and deaths. It features in the video games we play, the YouTube content we stream and the films and TV programs we watch.

Beyond being a core human experience, music is increasingly recognized as an important contributor to economic growth and prosperity. The Government of Canada recently declared that the arts and culture industries – including the music industry – are cornerstones of Canada's economy and create hundreds of thousands of jobs.[1] A number of recent studies have demonstrated the value of music to British Columbia's economy and have emphasised the importance of continuing to support and grow the industry in the province.[2]

Yet, a key challenge for the music industry in British Columbia (BC) has been a lack of up-to-date labour market information, including information related to employment numbers and patterns, worker demographics, wages, recruitment and retention dynamics, barriers, and pathways, together with other insights. This type of information can guide people working in the industry – and those who aspire to do so – when making decisions around learning, qualifications and career choices. It can help businesses who rely on music professionals to understand and to prepare for changing labour market demands. It can inform decision-makers as they shape policy and programming to support industry development.

The purpose of this report is to help fill labour market information gaps in BV's music industry. Using a number of research methods, this report addresses six key research questions:

1. What's at stake?
2. What are the size and characteristics of the BC music industry's workforce?
3. Is employment in the industry increasing, decreasing or staying the same?

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[1] Canadian Heritage. 2017. Creative Canada Policy Framework.

[2] See Nordicity. May 2018. Here, The Beat: The Economic Impact of Live Music in BC. Final Report. Prepared for Music Canada Live; and Sound Diplomacy, Music BC, and Secret Study. June 2018. Vancouver Music Ecosystem Study: Executive Summary. Prepared for FACTOR, Government of Canada, Creative BC and the Province of BC.

4. What recruitment and retention challenges do music businesses face and what are the impacts of these challenges?
5. What barriers and pathways influence the supply of labour in the industry?
6. What skills are in demand in the industry?

This report is structured around these questions and is divided into five sections. Section 1 provides an introduction. Section 2 scopes the industry for the purposes of this report and Section 3 describes the approach. Section 4 presents findings which link directly to the research questions. Section 5 provides ideas that could inform industry stakeholders moving forward. The annexes offer additional information.

3. Scope

The music industry, like many other creative industries, is notoriously difficult to scope. The structure of the industry differs from other parts of the economy in a variety of ways. First, it is a passion industry. Many people are involved in music for the love of it and do not necessarily generate income or revenue through their engagement with music. This means that the industry is characterized by a mix of not-for-profit activities (i.e. initiatives that are not primarily focused on directly generating revenue) and commercial endeavours (i.e. activities directly aimed at the generation of revenue).

"The DIY revolution has led many people in the industry to do many things in the industry." – *Industry stakeholder interviewee*

Secondly, it is a Do-It-Yourself (DIY) industry where multiple job holdings are common. The accessibility of recording capacities combined with the rise of social media and other forms of online engagement have made it possible for musicians to produce, market, promote and manage themselves. In other words, the services provided by music professionals are often varied in nature and can range from writing the lyrics to a love song to leading audio production for a new beat 'em up video game. One individual may play both these, and other, roles. While this is exciting for the industry, it makes occupational clustering (i.e. a way of organizing different roles in an industry based on similarities in knowledge, skills, abilities and outputs) ambiguous. This in turn can make research and analysis based on these clusters more challenging.

"You can see the gig economy everywhere but in the statistics." - *The New York Times*

Thirdly, the music industry, for the most part, is firmly rooted in the gig economy. Many music professionals work for themselves, moving from contract to contract (or gig to gig). While the gig economy has been a long-standing and widespread feature of the music industry (indeed, before it became used to describe a now common work arrangement, the term "gig" was often associated with a musician's public performances or work on a recording), it is a relatively new phenomenon in the broader economy. This means that there is only limited data on occupations and employment in the gig economy, making the scope, size and growth of the industries in the gig economy more difficult to measure.[3]

Analysis is further complicated by the fact that the traditional employer-employee relationship typically does not apply in a gig economy. This renders traditional labour market analysis and development tools that assume a clear distinction between employers and employees (e.g. assumptions around full-time and part-time working arrangements or strategies based on employer-led training and skills development) less useful.

These challenges notwithstanding, in order research and analyze BC's music industry, it is necessary to scope it. With this in mind, this report scopes BC's music industry along three lines.[4] First, it focuses on the commercial music industry. Specifically, it considers music professionals who undertake *paid* work in the industry and those businesses that rely on the services of these professionals in order to generate revenue.

Secondly, it divides the industry into music professionals and music businesses. Broadly speaking, a music professional is defined in this report as someone who works for a music-related company/organization/institution, is self-employed in the music industry without paid help (this includes one-person incorporation, unincorporated or sole proprietor of a music-related business), and/or is a freelancer who generates at least some income from the music industry). Music businesses are those businesses that rely on the services of music professionals. A music business is defined in this report as a company, business, organization or other entity that employs or works with music professionals (in addition to the owner, this can include self-employed with paid help) and that is based in British Columbia. This can include a range of business types.

Thirdly, the report identifies three key occupational clusters for music professionals in the industry and orients much of its analysis and findings related to music professionals around these clusters. The first is referred to as *primary creators*. These are individuals who generate income from creating or contributing to the creation of music. Occupations in this cluster include conductors, composers, lyricists, arrangers, musicians and singers.

The second occupational cluster is referred to as *secondary creators*. Occupations in this cluster focus on generating income by using the content developed by primary creators to create new content (e.g. a music video, a podcast, a blog post about a music festival, etc). Occupations in this cluster include producers (including record producers, stage director/producers in the performing arts, multimedia audio producers, radio producers, music editors, music video producers, music related TV, film and

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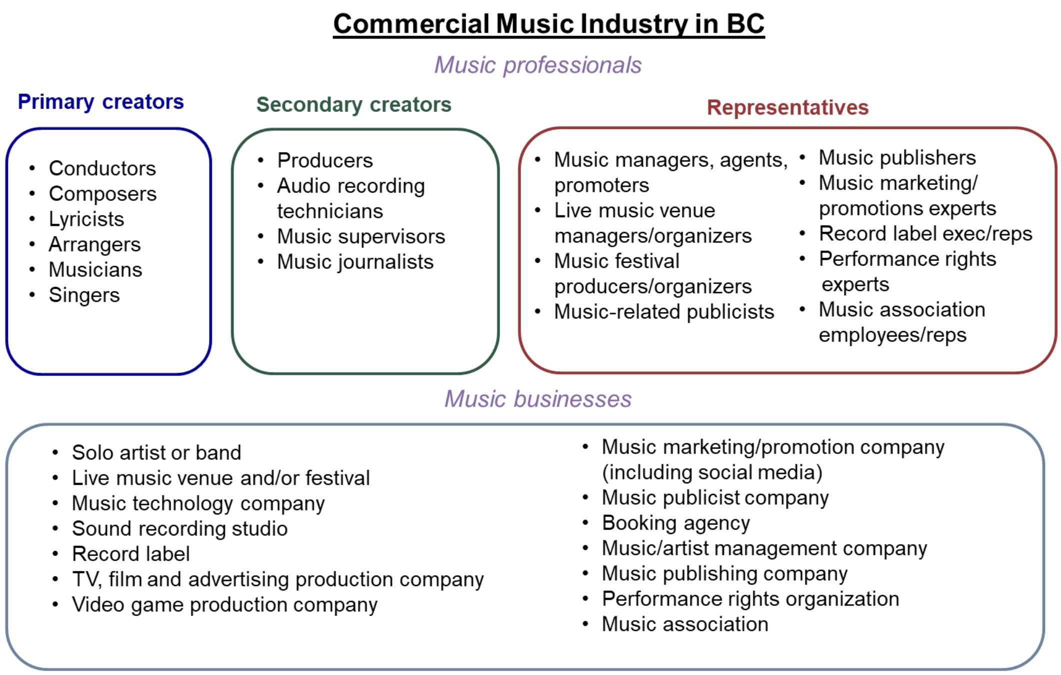
[3] See, for example, Hathaway, Ian and Mark Muro. 13 October 2016. *Tracking the gig economy: New numbers*. Brookings. Available online at: https://www.brookings.edu/research/tracking-the-gig-economy-new-numbers/#footnote-1. Casselman, Ben. 7 June 2018. Maybe the Gig Economy Isn't Reshaping Work After All." New York Times. Available online at: https://www.nytimes.com/2018/06/07/business/economy/work-gig-economy.html

[4] This approach to scoping aligns with techniques used in comparable studies and was confirmed through consultation with a number of industry stakeholders. See, for example, Brinton, Susan. April 2012. From the Margins to the Mainstream: Moving BC's Creative Industries Forward.; Government of Ontario, Ministry of Tourism and Culture. 2010. Ontario's Entertainment & Creative Cluster: A Framework for Growth; and PWC. August 2014. British Columbia music industry sector profile. Prepared for Creative BC.

advertising producers, video game audio producers), audio recording technicians (including sound engineers, recording studio operators, music/sound mixers), music supervisors, and music journalists.

The third cluster pertains to paid occupations that represent and/or monetize the content created by primary and secondary creators. This cluster is referred to as *representatives*. Occupations in this cluster include music managers, agents, promoters, live music venue managers/organizers, music festival producers/organizers, music-related publicists, music publishers, music-related marketing and promotions experts (including content marketing/social media marketing), record label executives/representatives, performance rights experts, and music association employees/representatives.

Figure 1. In-scope elements of BC's music industry



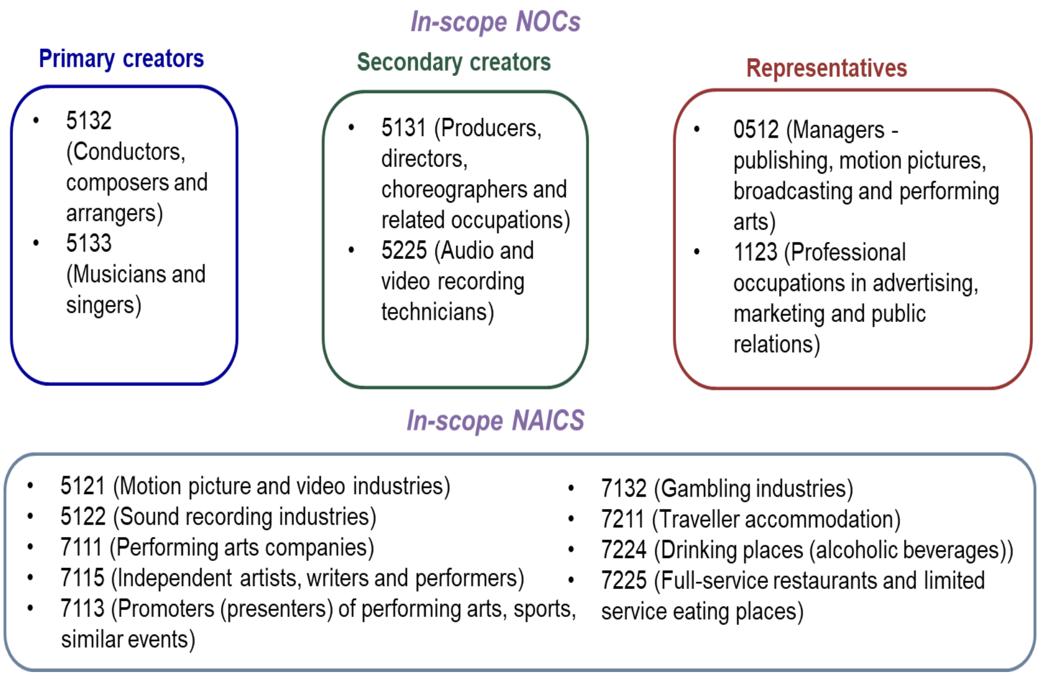
Unless otherwise state, when discussing the music industry in BC, this report is referring to the in-scope industry as illustrated in the figure above.

4. Approach

This report draws on secondary data sources to address a number of its research questions. This means that it is necessary to have the tools to think about the industry in a way that facilitates the use of these rich data sets. Specifically, the occupations and businesses considered in this report need to have some alignment with the National Occupation Classification (NOC) codes and the North America Industry

Classification System (NAICS) codes that are used to organize many Government data sources.[5] The figure below provides a mapping of the in-scope industry to relevant NOC and NAICS codes.

Figure 2. In-scope NOC and NAICS codes



Secondary data collection

This report uses a combination of quantitative and qualitative research methods and draws on both secondary and primary data to address the research questions. A number of quantitative questions could be addressed through either secondary data sources or by drawing on data generated through the two surveys conducted for this report. Since secondary data (particularly data from the 2016 Census) are more robust than survey data due to a larger and more representative sample, they are used where possible.

Primary research

Primary research methods (i.e. surveys, semi-structured interviews and a focus group) were used to uncover qualitative insights around the research questions from four main stakeholder groups. These include music professionals, music businesses, innovation companies, and other industry stakeholders. Specifically:

- A survey was conducted with music professionals across the province, generating 297 usable responses, with 255 respondents completing the entire survey. The music professionals survey

[5] The NOCs and NAICS used this report align to those used in other similar studies and were confirmed through consultations with industry stakeholders. See: Hills Strategies Research. 2004. Canada's Cultural Sector Labour Force. Prepared for the Cultural Human Resources Council. For more recent research, see the 2014 Creative Industry studies (unpublished) prepared for Creative BC.

questions and dissemination summary as well as information related to the representativeness of the survey can be found in Annex 1.

- A survey was conducted with owners/representatives of music businesses from across the province, generating 79 usable responses with 51 respondents completing the entire survey. The music businesses survey and dissemination summary as well as information related to geographical representation of respondents can be found in Annex 2.
- To supplement survey findings and to expand the research, a focus group was conducted with 9 music professionals, representing all three occupational clusters. The music professionals focus group guide can be found in Annex 3.
- In addition, semi-structured interviews were conducted with 8 owners of music businesses, representing a range of business types. The semi-structured interview guide for music businesses can be found in Annex 4.
- Interviews were conducted with 10 innovation companies in five cities across the province. Companies were identified by using *Top 40 Under 40* award recipient lists from cities across the province, Business in Vancouver's 50 BC Innovations to Watch list and, in some cases, word of mouth. They were selected from across a range of industries, including IT, financial services, healthcare, entertainment, marketing, clean tech and consumer products. Interviews were conducted with companies based in Kelowna, Nanaimo, Prince George, Vancouver and Victoria. The semi-structured interview guide used for these interviews can be found in Annex 5.
- Open-ended interviews and discussion groups were conducted with approximately 20 industry stakeholders from across the province and other parts of Canada between April and June 2018 in order to scope the research and test the initial approach to analysis.

Literature review

A literature review was conducted to identify trends that are relevant to the music industry labour market in BC as well as to test the accuracy of the findings found in this report against a larger body of research. Approximately 40 resources are referenced in this report. A full list of the cited resources can be found in Annex 6.

Limitations and work arounds

While the secondary data used in this report is rich, it does not always perfectly reflect the realities of the industry. For example, a number of occupations in the music industry are subsumed under NOCs that cut across multiple industries. This makes it difficult to accurately capture information about these occupations as they pertain to the music industry specifically. For a more detailed discussion of limitations related to the data used in this report and how these are addressed, see Annex 7.

5. Findings

1.	What's at stake?

***Finding:* The research conducted for this report suggests that there is a link between the health of a city's music scene and the ability of innovation companies to attract and retain innovative and creative talent.**

There is widespread acknowledgement across the industry of the value of music in connecting people and building a sense of community,[6] creating opportunities for expression,[7] and helping enhance learning and creative capacities.[8] There is also a body of research that suggests that music has a significant economic impact. For example, as noted in the introduction to this report, the Government of Canada recently declared that the arts and culture industries – including the music industry – are pillars of Canada's economy.[9] Recent studies prepared by Nordicity and Sound Diplomacy found that music makes a vital contribution to BC's overall economy, including by providing thousands of jobs.[10]

In addition, there is literature indicating that a city's music, arts, and culture scene has a positive impact on a its capacity to attract and retain innovative companies and the creative and innovative employees they rely on.[11] These findings are increasingly influencing policy. Indeed, a number of music city strategies across Canada stress the impact that the broad music industry can have on driving economic growth, attracting investment and creating jobs.[12]

This report sought to test the notion that there is a link between the cultural and the innovation industries through interviews with owners/representatives of 10 innovation companies throughout the province, specifically Kelowna, Nanaimo, Prince George, Vancouver and Victoria. (For the purposes of this report, an innovation company is defined as an entrepreneurial company that employs creative and

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[6] See, for example, Suttie, Jill. 15 January 2015. Four Ways Music Strengthens Social Bonds. Greater Good Magazine.
[7] See, for example, Eerola, Tuomas, Anders Friberg and Roberto Bresin. 30 July 2013. Emotional expression in music: contribution, linearity, and additivity of primary musical cues. Frontiers in Psychology.
[8] See, for example, Arts Education Partnership. 2011. Music Matters: How music education helps students learn, achieve and succeed.
[9] Canadian Heritage. 2017. Creative Canada Policy Framework.
[10] See Nordicity. May 2018. Here, The Beat: The Economic Impact of Live Music in BC. Final Report. Prepared for Music Canada Live; and Sound Diplomacy, Music BC, and Secret Study. June 2018. Vancouver Music Ecosystem Study: Executive Summary. Prepared for FACTOR, Government of Canada, Creative BC and the Province of BC.

[11] See, for example, Business for the Arts. 2016. Culture for Competitiveness: How Vibrant Culture Attracts Top Talent. Summary available here; Florida, Richard. 2002. *The Rise of the Creative Class: Why cities without gays and rock bands are losing the economic development race.* Washington Monthly; Harper, Garrett and Chris Cotton. 2018. Nashville Music Industry Impact, Contribution and Cluster Analysis.
[12] See, for example, Toronto Music Advisory Council. February 2016. Toronto Music Strategy: Supporting and Growing the City's Music Sector. Prepared for the City of Toronto. See also IFPI and Music Canada. 2015. The Mastering of a Music City: Key Elements, Effective Strategies and Why It's Worth Pursuing.

innovative people (i.e. people that are expected to push the envelope, invent and innovate as a core part of their job) to create or provide a unique product or service.) The purpose of these interviews was to determine if innovation companies are leveraging a city's music scene to attract and retain innovative talent.

Most employers (9 out of 10) *agreed or strongly agreed* that there is a connection between a city's cultural scene, particularly its music scene, and its capacity to attract and retain innovative talent. The majority of employers (8 out of 10) acknowledged that their employees placed a premium on access to a vibrant arts and culture scene, including a city's music scene. The same number noted that having access to a diverse cultural scene that includes access to music entertainment compels people to want to live in the city where their company is located. In this regard, all employers from Victoria (3 out of 3) where the tech industry is booming, noted that their employees required affordable cultural experiences, including through music venues and festivals, to keep them committed to living and working in the city over the long haul. Furthermore, 7 out of 10 employers indicated that there is an opportunity for the music industry to play a role in helping them to attract creative talent and pointed to the need to deepen connections and create more collaboration opportunities between the music industry and the innovation economy.

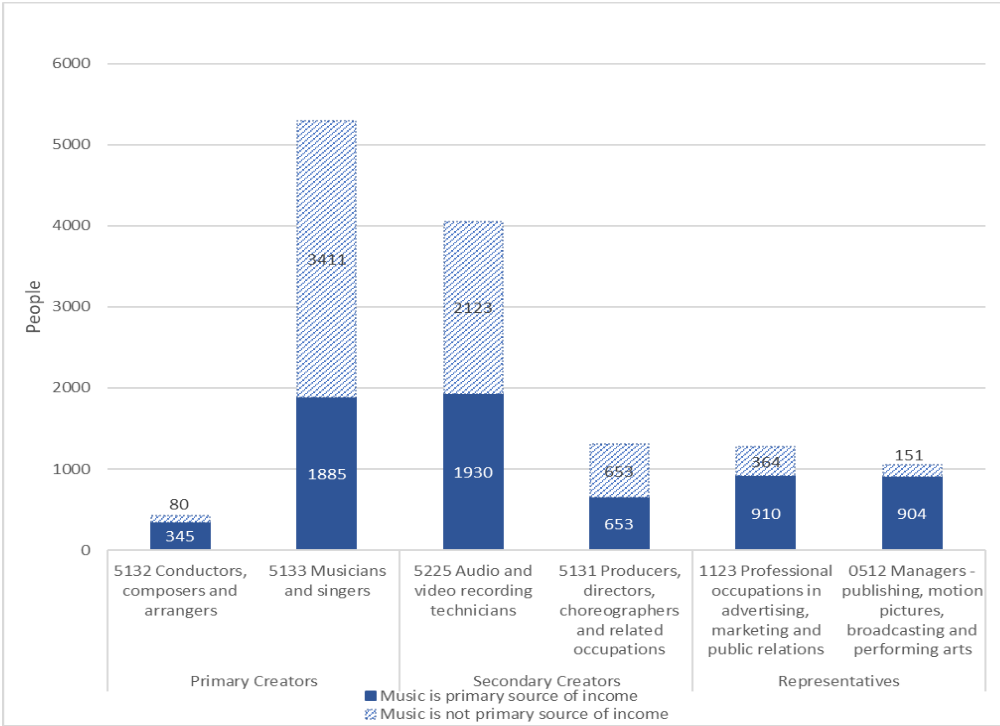
2.	What are the size and characteristics of the BC music industry's workforce?

***Finding*: As many as 13,408 people in BC earn at least part of their income through their work in the music industry. Of these, up to 6,627 people identify their music-related work as their main form of employment. Over 80% of people perform multiple roles across the industry.**

According to 2016 Census data, up to 6,627 people in BC identify an occupation in the music industry as their main form of employment.[13] People who perform secondary creator roles represent the largest occupational cluster in the industry (2,583 people), followed by primary creators (2,230 people) and representatives (1,814 people), respectively. Survey results reveal that an estimated additional 6,781 people generate part of their income through their activities in the music industry.

[13] Statistics Canada, 2016 Census of Population, custom data request through the B.C. Labour Market Information Office. Survey weights were applied to this calculation. See Annex 7 for more details on these calculations. This assessment is based off results from the 2016 Census which asked individuals to identify the job at which they worked the most hours.

Figure 3. Number of people who generate at least part of their income through music[14]



In addition, according to survey results, over 80% of people in the industry perform multiple roles. The most common additional roles in the industry are music managers, agents, promoters, publicists and marketing experts.

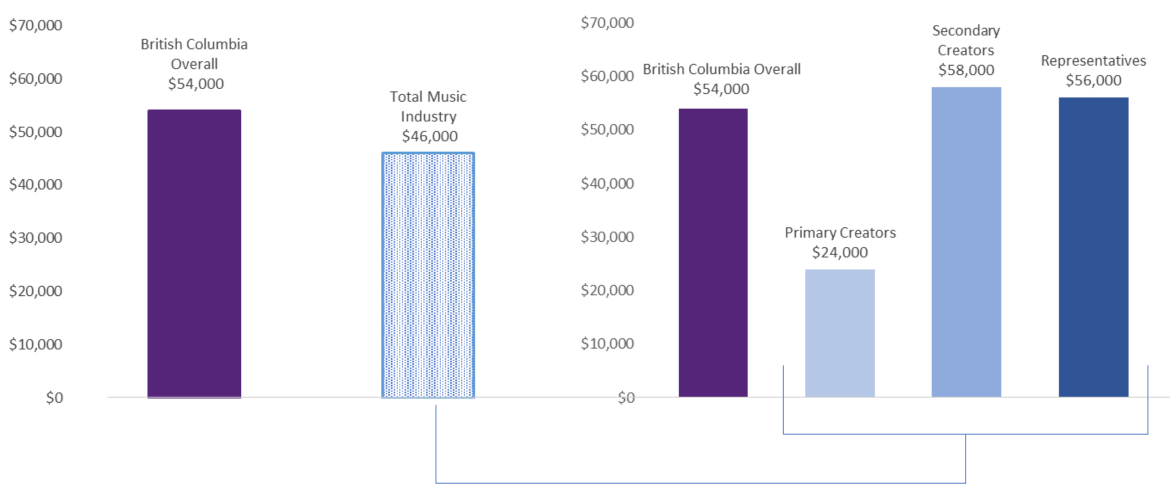
There findings are consistent with the literature. For example, according to the Cultural Human Resources Council, employment in a cultural industry may not be an individual's primary employment (i.e. the position that consumes the largest portion of an individual's working hours). For this reason, "[C]ensus estimates of the cultural sector labour force are likely to be somewhat low."[15] The same study notes that multiple job-holding is a common feature of cultural industries.

***Finding:* Music professionals across all three occupational clusters earn $46,000 a year, less than BC's median annual income (i.e. $54,000 a year). However, there is significant variation across the industry with primary creators earning less than half as much as secondary creators and representatives. In addition, most people (79%) in the industry are self-employed. This working arrangement is most common among primary creators and least common among representatives.**

[14] Statistics Canada, 2016 Census of Population, custom data request through the B.C. Labour Market Information Office. Survey weights were applied to this calculation. See Annex 7 for more details on these calculations.
[15] Cultural Human Resource Council. 2004. Canada's Cultural Sector Labour Force. Available online at: https://www.culturalhrc.ca/research/G738_CHRC_AnnexA_intro_E.pdf

According to 2016 data, the full-time median income for music professionals was approximately $46,000 just under the BC median income of approximately $54,000.[16] However, there is significant variation across occupational clusters. Primary creators earned approximately $24,000 in 2016, less than half as much as secondary creators (approximately $58,000) and representatives ($56,000). These results align with the music professionals survey which found that the 47% of respondents whose primary occupation is in the music industry earned between $20,000 and $59,999 last year (before tax) with primary creators earning the least and representatives earning the most income overall.

Figure 4. Median income for music professionals compared to BC overall[17]



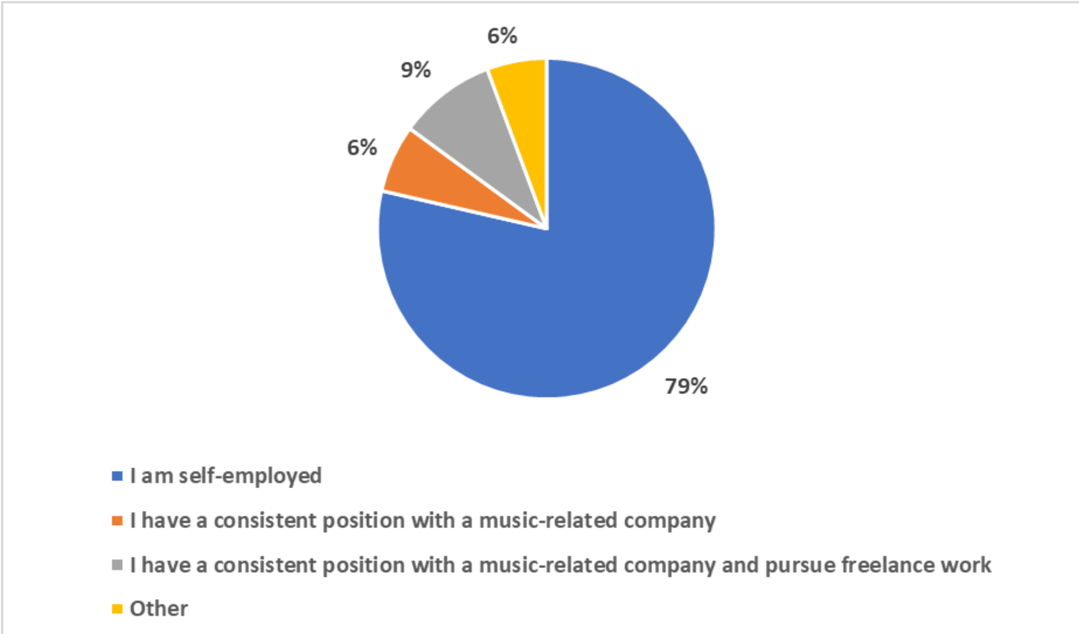
Most people (79%) in the industry are self-employed where self-employed is defined as freelance, contract-based and/or one-person incorporation, unincorporated or sole proprietor.[18] This working arrangement is most common among primary creators and least common among representatives who are more likely to hold consistent positions with a music-related company.

[16] These numbers are based on 2016 Census of Population 98-400-X2016356 (Census 2016 4NOC - minority, income). Survey weights were used in this calculation. Overall industry income is the employment weighted average of the three occupational clusters.

[17] Ibid.

[18] Response options for this survey question included: I am self-employed (freelance, contract-based, and/or one-person incorporation, unincorporated or sole proprietor); I have a consistent position with a music-related company (either part-time, full-time, salaried or hourly); I have a consistent position with a music-related company and I also pursue freelance work in the music industry; I am an intern or I am on a work placement with a music-related company; and other (please specify).

Figure 5. Most common working arrangements in the music industry[19]



This working arrangement (i.e. self employment focused on freelance and contract-based opportunities) is a hallmark of the gig economy and comes with both benefits and costs. A 2016 study found that people who do independent work by choice "reported higher levels of satisfaction in multiple dimensions of their work lives than those holding traditional jobs by choice, indicating that many people value the nonmonetary aspects of working on their own terms."[20] This arrangement can be particularly appealing to music professionals because it allows them to take control of the management of their careers and "feel empowered to grow, develop, achieve and contribute in a variety of creative and professional ways."[21]

However, there are also downsides to the gig economy. This working arrangement typically does not come with rights and entitlements, including parental leave, holiday pay, workers' compensation insurance for workplace injuries, employment insurance, and extended medical benefits. In addition, success in this model of work depends on a special skill set that includes business development, marketing, networking, communication, financial literacy, digital literacy, and negotiation. This is true for the overall gig economy but may be particularly true for work in the music industry, where

[19] The option of "I am an intern or I am a on a work placement in a music-related industry" was offered to respondents. However, only one respondent selected this option. Given the small sample size, this response is not reflected in the results presented here.

[20] Manyika, J., *et al.* Independent work: Choice, necessity, and the gig economy. McKinsey Global Institute, October 2016. Available online at: https://www.mckinsey.com/featured-insights/employment-and-growth/independent-work-choice-necessity-and-the-gig-economy

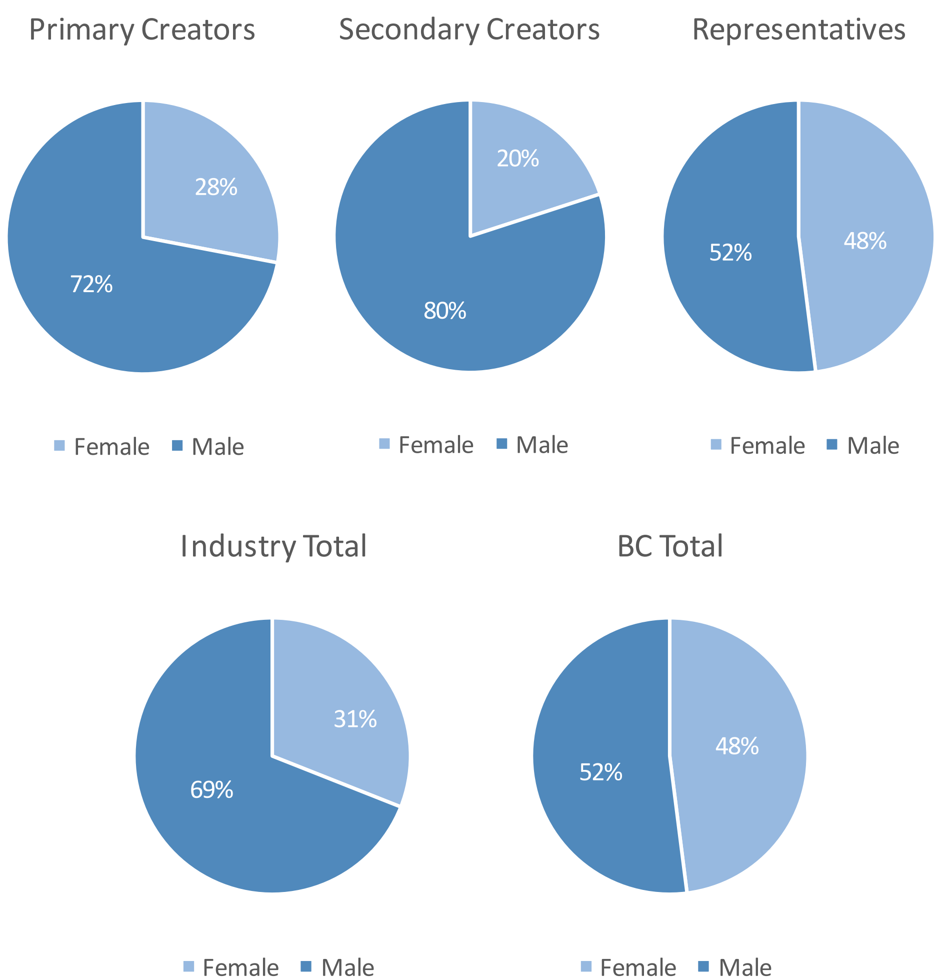
[21] Blackburn, Alana. 21 June 2018. The gig economy is nothing new for musicians – here's what their 'portfolio careers' can teach us. The Conversation.

networking and marketing are vital for both entrance into the industry and career advancement. (See more below.) However, another potential downside is the lack of access to training provided by employers, which is often made available only to traditional employees as well as a lack of access to government-funded skills training programs.[22]

***Finding:* The industry's workforce includes a lower proportion of women, people who self-identify as Indigenous and visible minorities than the provincial economy.**

Approximately 70% of people working in the music industry are male compared to 52% in BC's overall economy. Secondary creator occupations are particularly male dominated.

Figure 6. Percentage of women in BC's music industry[23]

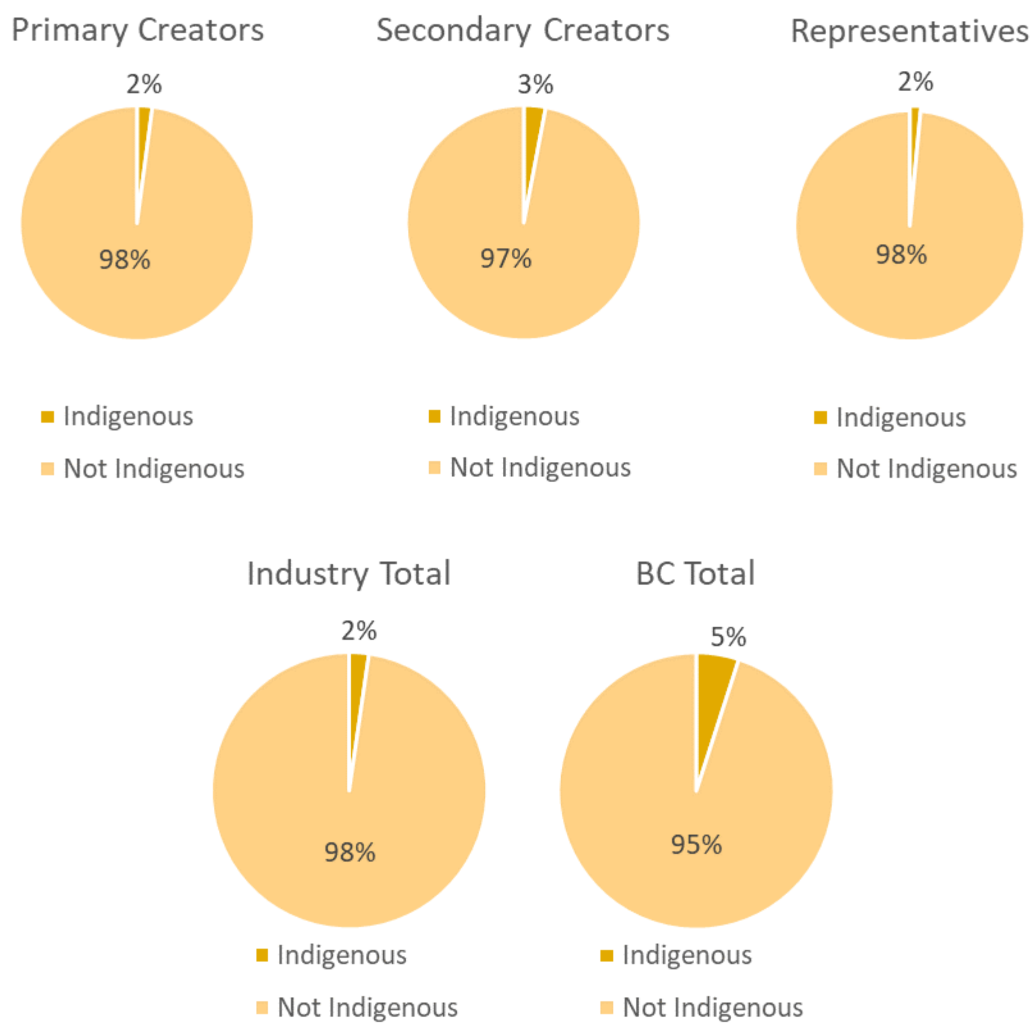


[22] See: Advisory Council on Economic Growth. December 2017. [Learning Nation: Equipping Canada's Workforce with Skills for the Future](). For example, the Canada Jobs Grant provides funding for training but requires an employer to contribute at least one-third of the training course (with the exception of the unemployed stream) and that requires an employer to have a job for the participant at the end of training.

[23] Statistics Canada, 2016 Census of Population, custom data request through the B.C. Labour Market Information Office. Survey weights were applied to this calculation.

People who self-identify as Indigenous (First Nations, Métis, or Inuit) are also under-represented in the music industry compared to the overall BC economy. This group is particularly under-represented among primary creators and representatives.

Figure 7. Percentage of people in BC's music industry who self-identify as Indigenous[24]



In addition, overall, the percentage of people who identify as a visible minority in BC's music industry is lower than the overall BC economy with visible minorities being particularly under-represented among secondary creators.

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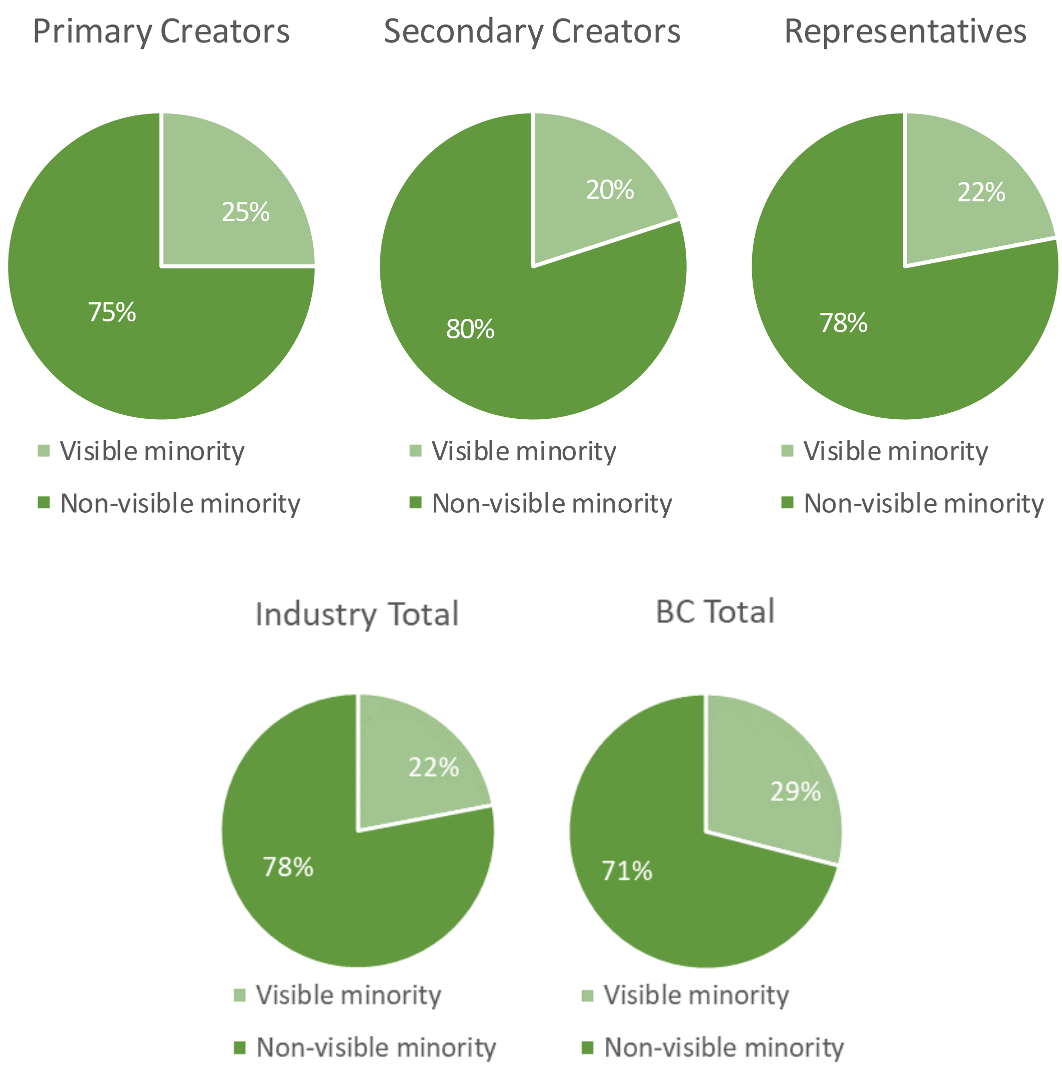
[24] Statistics Canada, 2016 Census of Population, custom data request through the B.C. Labour Market Information Office. Survey weights were applied to this calculation.

Figure 8. Percentage of people who identify as a visible minority in BC's music industry[25]



[25] Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016356. Survey weights were applied to this calculation.

The age distributions within the industry align with those found in overall BC economy.

Figure 9. Age distributions in BC's music industry[26]

Age distribution	15 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65+
Primary Creators	14%	21%	19%	18%	19%	10%
Secondary Creators	8%	29%	27%	21%	12%	3%
Representatives	10%	34%	24%	18%	11%	3%
Industry Total	**10%**	**30%**	**24%**	**19%**	**13%**	**4%**
BC Total	**14%**	**21%**	**21%**	**23%**	**17%**	**4%**

"In my entire career, I've only ever worked with one female producer and I think that's a shame." *- Canadian singer, Lights (as quoted by the CBC in footnote below)*

Findings related to the demographics of the music industry are reinforced in the literature. A June 2018 study prepared for the Screen Composer Guild of Canada found a large gender gap among screen composers in Canada. Specifically, the study found that 85% of composers are male.[27] In addition, anecdotal evidence suggests that the under-representation of women in secondary creator occupations is well-recognized across the industry in Canada. [28] Recent research related to women in the music industry in Canada confirms these observations. A 2015 Ontario study prepared for Women in Music Canada found that, of all the roles in the music industry, women are least likely to be working in music production roles.[29] The same study found that the majority of women working in the industry are in promotions and marketing roles, event production and as artist managers and agents.

The under-representation of Indigenous people and people who identify as a visible minority in Canada's cultural industries has been increasingly recognized by key industry stakeholders. For example, the Creative Canada policy framework, the Government of Canada's vision and approach to creative industries and the creative economy in Canada, focuses on supporting organizations representing cultural diversity, including by increasing investment in Indigenous arts and culture.[30] Increasing diversity has been a priority in all BCMF and Amplify BC programs, and is reflected as such in program guidelines and scoring sheets. Amplify BC's partnership with the First Peoples' Cultural Council also supports Indigenous musicians and industry professionals. In addition, Creative BC's recent launch of a

[26] Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue no. 98-400-X2016291. Survey weights were applied to this calculation.
[27] Gauthier, Benoit and Lisa Freeman. June 2018. Gender in the Canadian Screen Composing Industry. Prepared for the Screen Composers Guild of Canada.
[28] See: Hunt, Nigel. 24 March 2018. How Lights, IsKwé and other women are making change in the Canadian Music Industry. CBC News. See also Lanzendorfer, Joy. 30 August 2017. Why Aren't There More Women Working in Audio? The Atlantic.
[29] Nordicity. May 2015. A Profile of Women Working in Ontario's Music Industry. Prepared for Women in Music Canada.
[30] Canadian Heritage. 2017. Creative Canada Policy Framework. Available online at: https://www.canada.ca/content/dam/pch/documents/campaigns/creative-canada/CCCadreFramework-EN.pdf

Digital Production Fund is aimed at increasing participation in the creative industries by under-represented groups through support for production of digital content by Indigenous creators, visible minorities, women and creators with disabilities.[31]

"Creativity needs diversity to survive and thrive." – *Industry stakeholder interviewee*

BC's music industry would benefit from greater diversity and inclusion. Beyond the inherent value of ensuring fairness and equality, the literature consistently suggests that diversity and inclusion in the workplace and across an industry creates a unique source of value. A 2016 study found that millennials often actively seek out employers that create diverse and inclusive workplaces.[32] McKinsey found a positive correlation between diversity (reflecting gender, racial and ethnicity factors) at the organization's leadership level and improved financial performance.[33] A study by Deloitte found a correlation between employees' perspectives on inclusivity and business performance.[34] While stopping short of describing these linkages between diversity, inclusion and performance as causal in nature, the studies shed some light on the unique sources of value to the workplace of diversity and inclusion, including bringing to bear a greater variety of problem-solving approaches, perspectives, and ideas to improve the quality of decisions.[35] For the music industry, diversity can play a particularly important role in keeping a music scene fresh and vibrant, inspiring the creation of new genres, and ensuring that music appeals to a larger audience.[36]

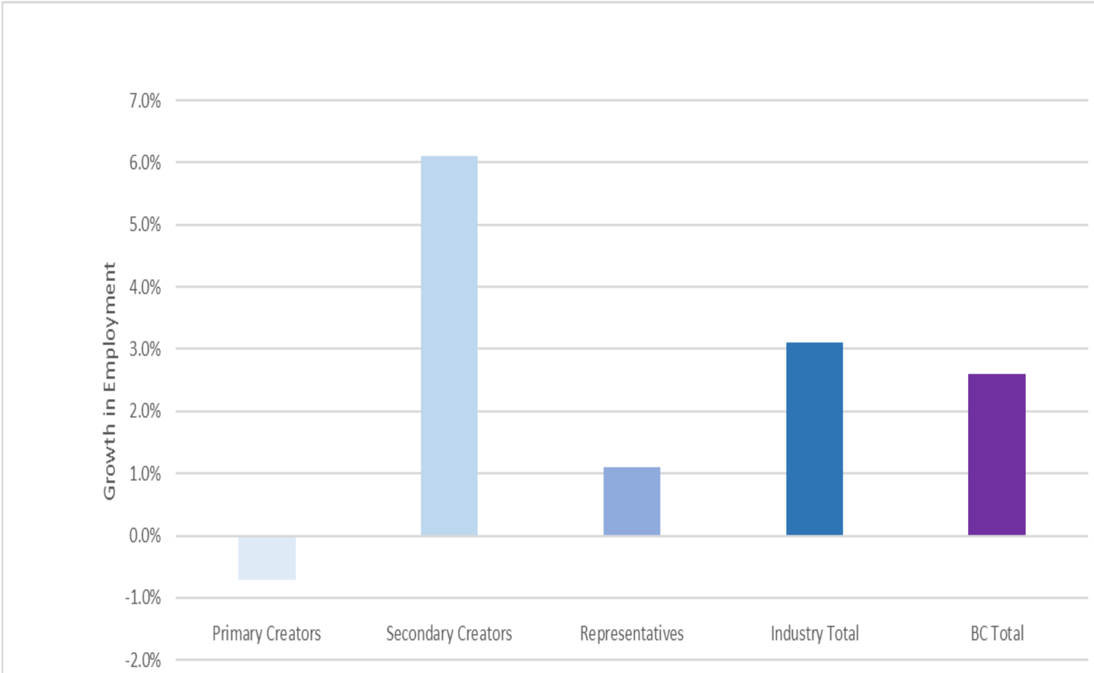
3.	Is employment in the industry increasing, decreasing or staying the same?

***Finding*: From 2011 to 2016, overall growth in employment in the BC music industry was an estimated 3.1%, slightly higher than the growth in employment in the overall BC economy. This was largely driven by growth among secondary creators with primary creators experiencing negative growth and representatives experiencing slow growth during this period.**

According to Census data, employment in the overall music industry in BC grew by 3.1% between 2011 and 2016. Overall growth in BC's employment during the same period was 2.6%. However, there is significant variation in growth among occupational clusters, with secondary creators experiencing 6.1% growth and primary creators and representatives growing at -0.7% and 1.1% respectively during this period.

[31] CBC Media Centre. 25 June 2018. Creative BC and CBC Launch New Digital Production Fund. Available online at: http://www.cbc.ca/mediacentre/press-release/creative-bc-and-cbc-launch-new-digital-production-fund
[32] Institute for Public Relations, KRC Research and Weber Shandwick. June 2016. Millennials at Work: Perspectives on Diversity and Inclusion.
[33] Hunt, V., D. Layton, and S. Prince. Diversity Matters. McKinsey & Company, February 2015.
[34] Deloitte. May 2013. Waiter, is that inclusion in my soup? A new recipe to improve business performance. Victorian Equal Opportunity & Human Rights Commission.
[35] Mahboubi, P. November 2017. What is to blame for the widening racial earnings gap? The Globe and Mail.
[36] Singers, Carol. 30 July 2017. Why the Music Business Needs to Wake up and Embrace Gender Diversity. Variety.

Figure 10. Growth in employment from 2011 to 2016 in BC's music industry[37]

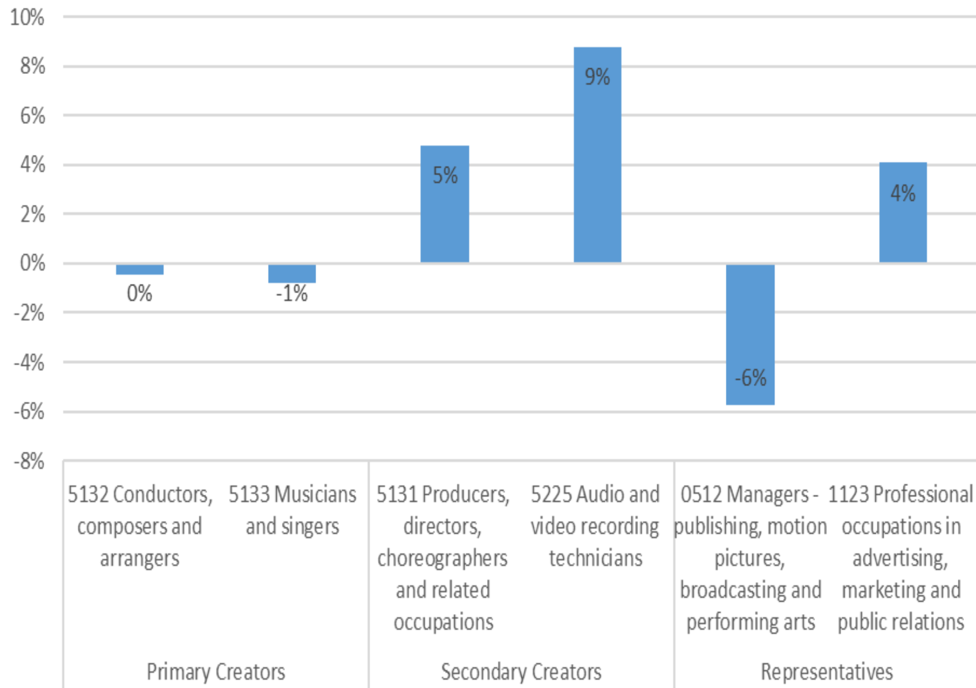


Among specific occupations, growth was lowest overall for NOC 0512 (Managers – publishing, motion pictures, broadcasting and performing arts). This may be due to the fact that, in a DIY industry, artists are increasingly managing themselves. These findings are consistent with the music professionals survey, which found that the most common additional roles (i.e. additional to a person's primary role in the industry) are related to music management. Growth rates were highest for NOC 5225 (audio and video recording technicians), followed by NOC 5131 (producers, directors, choreographers and related occupations). This may be due in part to growth in the film industry in BC, which has seen considerable positive growth in recent years.[38]

[37] Statistics Canada, 2011 Census of Population, Statistics Canada Catalogue 99-012-X2011060 and Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue 98-400-X2016298. Survey weights were used for these calculations.

[38] See for example, Mooney, Harrison and Susan Lazaruk, February 2, 2018. [B.C. now Canada's leading province for film and TV production: report](). Vancouver Sun.

Figure 11. Growth in employment for in-scope NOCs between 2011 and 2016[39]

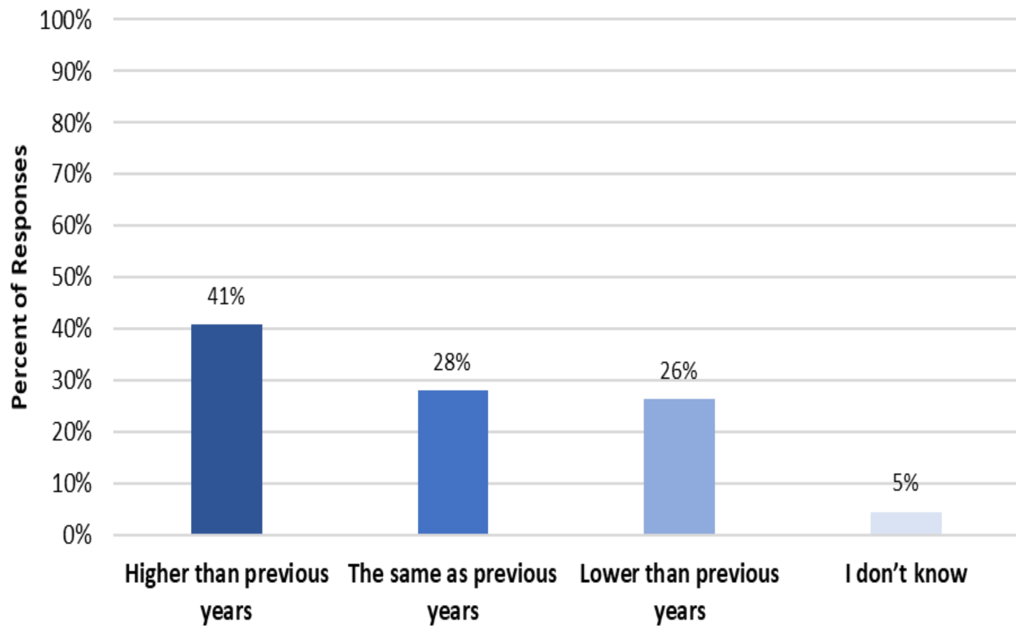


***Finding:* There is evidence to suggest that opportunities in the music industry in BC have increased recently for a portion of the industry. Survey results indicate that about 40% of people are earning more music-related income this year compared to previous years and about half spent more hours on their paid music work in the past 12 months compared to previous years. In addition, about 70% of businesses have seen an increase in revenue in the past five years and 90% anticipate an increase in the next five years.**

Approximately 41% of survey respondents described their income as significantly higher (11%) or higher but not by much (30%) this year compared to last year. Approximately 28% saw no change with 26% indicating that their income this year compared to previous years was lower but not by much (10%) or significantly lower (16%). These findings are relatively consistent across occupational clusters and may indicate that industry-wide opportunities have increased recently for a portion of people. Survey and focus group results indicate that there are a number of reasons for increases in income, including greater collaboration opportunities with other artists, more touring opportunities as well as the positive impact of recent grant opportunities, including the BC Music Fund (BCMF) and more recently, Amplify BC, both administered by Creative BC with funding provided by the Province of BC.

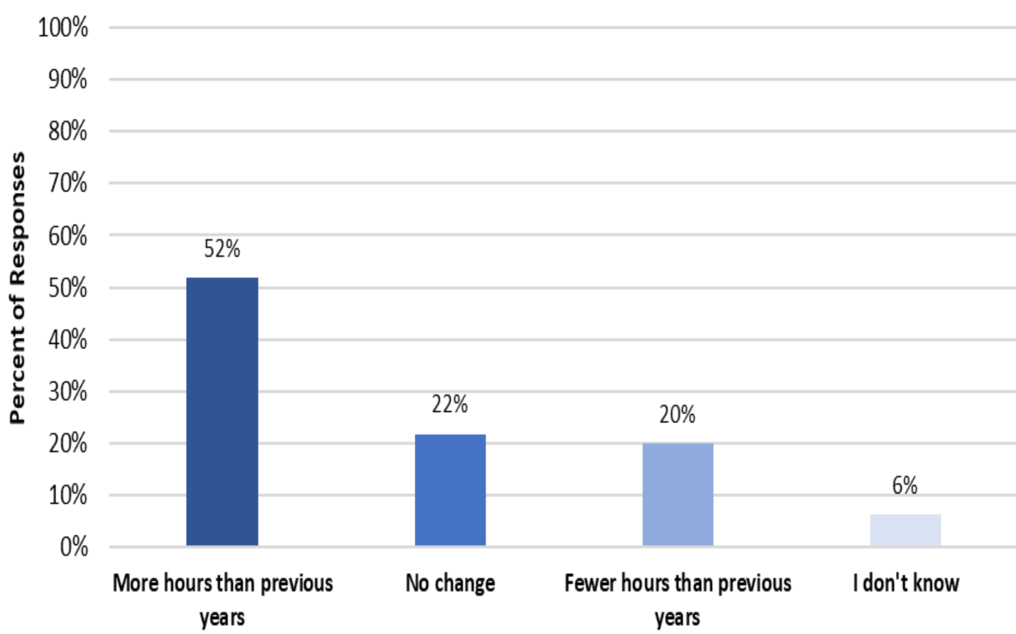
[39] Statistics Canada, 2011 Census of Population, Statistics Canada Catalogue 99-012-X2011060 and Statistics Canada, 2016 Census of Population, Statistics Canada Catalogue 98-400-X2016298. Survey weights were used for these calculations. Averages are weighted by employment. Numbers in this graph were rounded for presentation purposes.

Figure 12. Music-related income in the past 12 months compared to previous years



In addition, over 50% (~52%) of survey respondents noted that they spent more hours on their paid music work in the past 12 months compared to previous years. About 22% reported no change and 20% of respondents indicated that they spent less time on their paid music work in the past 12 months compared to previous years. These findings are relatively consistent across occupational clusters and may signal an increase in work opportunities across the industry for a portion of people.

Figure 13. Hours spent on paid music work in the past 12 months compared to previous years

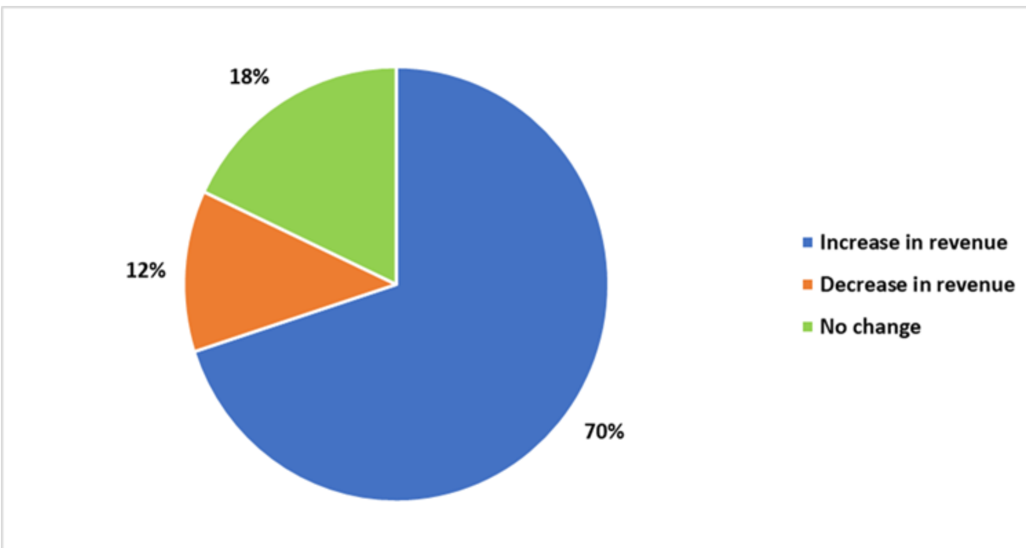


Results from the music businesses survey also point to recent growth. When asked if their business revenue had changed in the past five years, 70% of respondents to the music business survey indicated that their revenue has increased in the past five years with about a third (30%) of these reporting that revenue has increased by more than 25%. Just under 20% (~18%) indicated no change and about 12% indicated that their revenue had decreased in the past 5 years. There was no significant difference among different types of music businesses.

"The BC Music Fund has been a really big boost for us. We have really benefitted from the recent infusion of funding. Like other provinces in Canada, we hope this funding will last." – *Music business interviewee*

Interviews with music businesses revealed that recent increases in revenue were due primarily to an increase in demand for services, combined with the fact that people are becoming more skilled and efficient at what they do. Several interviewees pointed to the catalytic effect of the BC Music Fund in growing their businesses.

Figure 14. Music business revenue change in the past 5 years

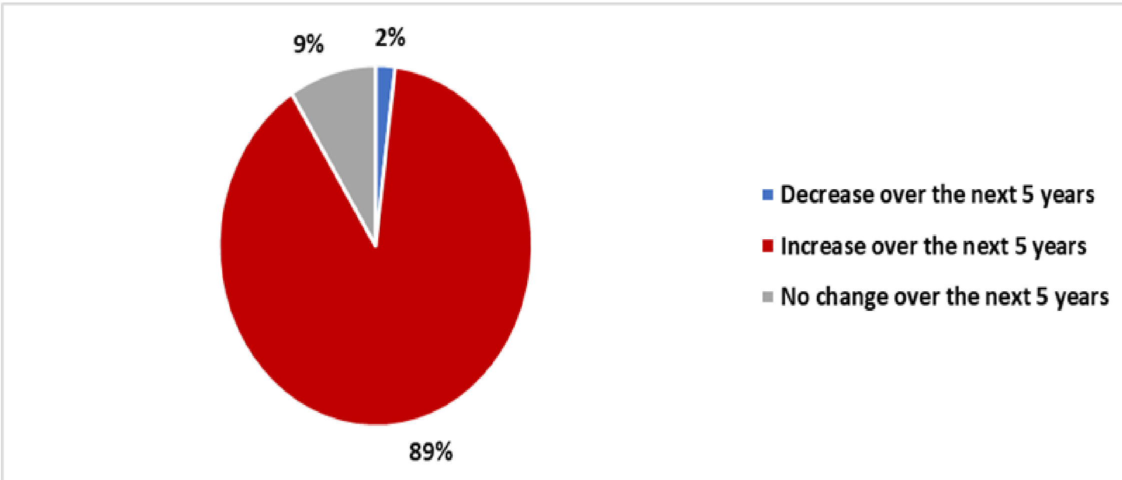


These findings are consistent with data collected by Creative BC, which found that 73% of music businesses had experienced an increase in revenue over the past two fiscal years (i.e. 2016 and 2017).[40] It is important to note that these are not apples-to-apples comparisons. For example, the time frames for comparison of revenue are different. The music businesses survey conducted for this report asks about changes in revenue over the past five years, while Creative BC's data is comparing 2016 and 2017 fiscal years. In addition, the Creative BC data relates to businesses that received support from the BC Music Fund, which may bias results in favour of increased revenue. Despite these limitations, it is nevertheless interesting to observe that this Creative BC data also reveals a recent increase in revenue among music businesses.

[40] Source: Data shared by Creative BC with the report authors.

Additionally, according to the music business survey, there is a general optimism about future growth with almost 90% (~89%) of respondents predicting positive growth over the next five years, about 40% of whom anticipate an increase of more than 25%.

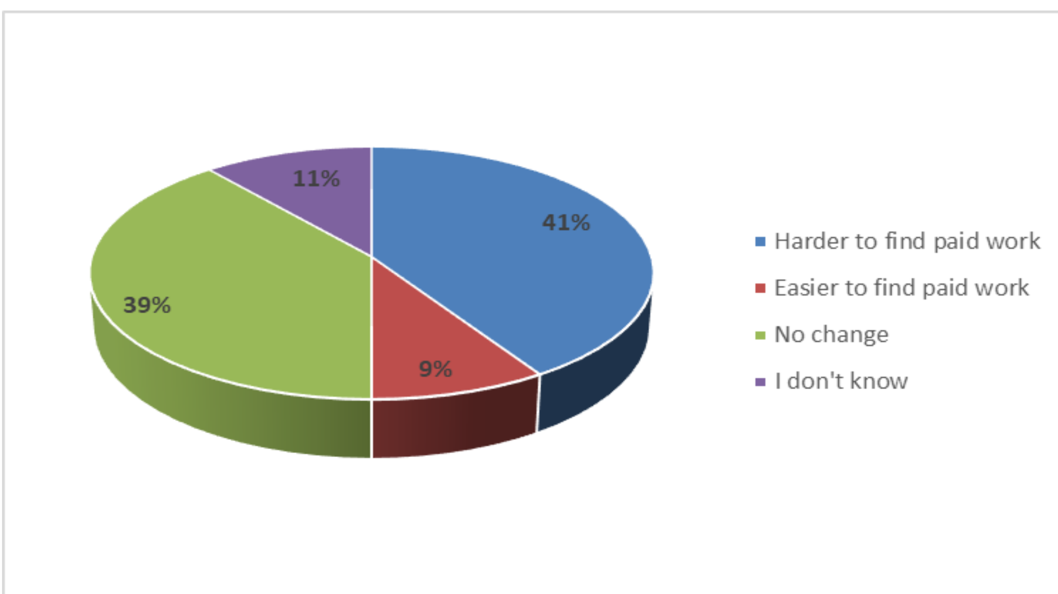
Figure 15. Anticipated growth over next five years (music businesses)



Finding: **However, while a number of indicators point to recent growth, compensation for paid work is a concern.**

Despite recent signs of growth, about 41% of music professionals reported that it is harder to find paid work in the music industry at the wages they expect this year compared to previous years. These findings are consistent across occupational clusters.

Figure 16. Ability to find paid work at expected wages compared to previous years



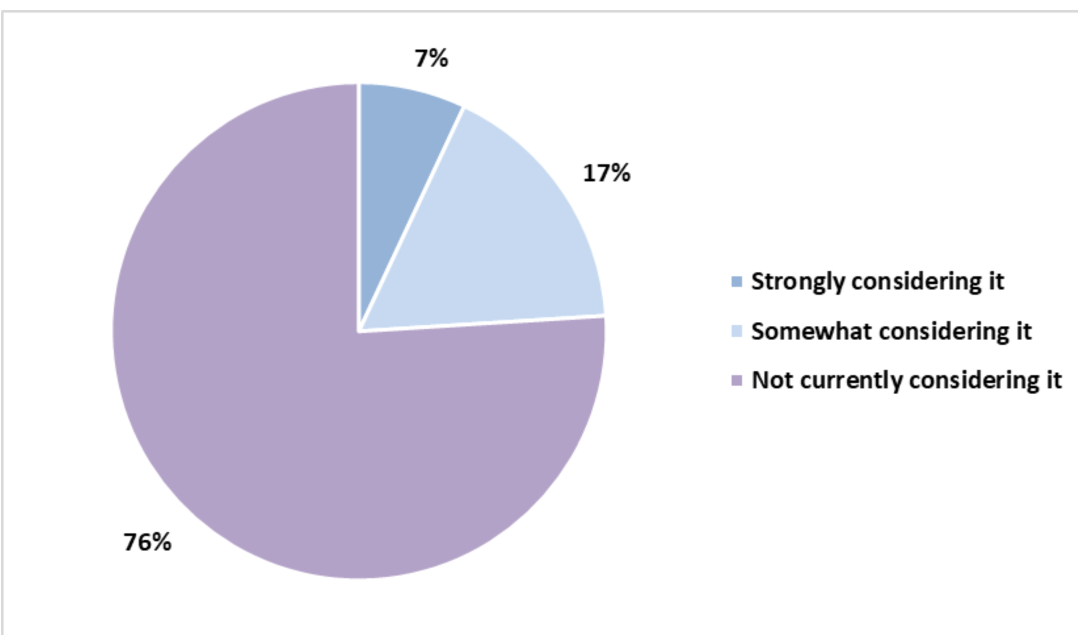
At first glance, trends in the industry may appear to be somewhat contradictory. That is, a portion of people are making more money, working more hours and yet they are finding it harder to secure work at expected wages. However, survey and focus group results suggest that these discrepancies have less to do with access or exposure to work opportunities and more to do with the compensation offered for this work. Indeed, the fact that "wages have not kept pace with the cost of living" was referenced as one of the main reasons people intend on leaving the industry. (See analysis below). In addition, concerns around stagnant wages featured prominently in many of the open-ended survey responses.

"A lot of my colleagues and I work around the clock to barely get by. We don't have the resources to hire and collaborate with other professionals in the business, so we try to do everything ourselves – with mixed results." - *Survey respondent*

Finding: **The industry in BC is at risk of losing a significant portion of its music professionals. About a quarter of music professionals intend on leaving the music industry altogether, primarily due to concerns about wages and paid opportunities. Approximately 8% of those who intend on staying in the industry anticipate leaving BC to pursue their careers elsewhere.**

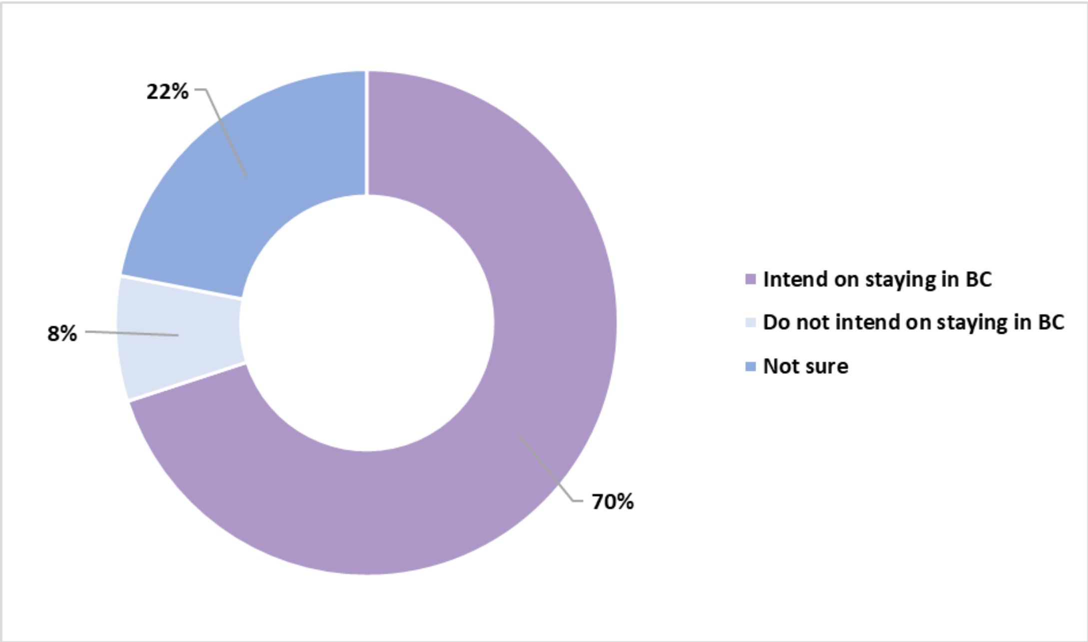
Despite recent signs of growth, about a quarter (24%) of respondents to the music professionals survey are considering leaving the industry with about 7% strongly considering it and 17% somewhat considering it.

Figure 17. Intention to leave the music industry (music professionals)



In addition, of those music professionals who indicated an intention to continue to work in the industry, approximately 8% anticipate leaving BC to pursue their music careers and another 22% were unsure if they would stay in BC for the foreseeable future. These findings were consistent across occupational clusters.

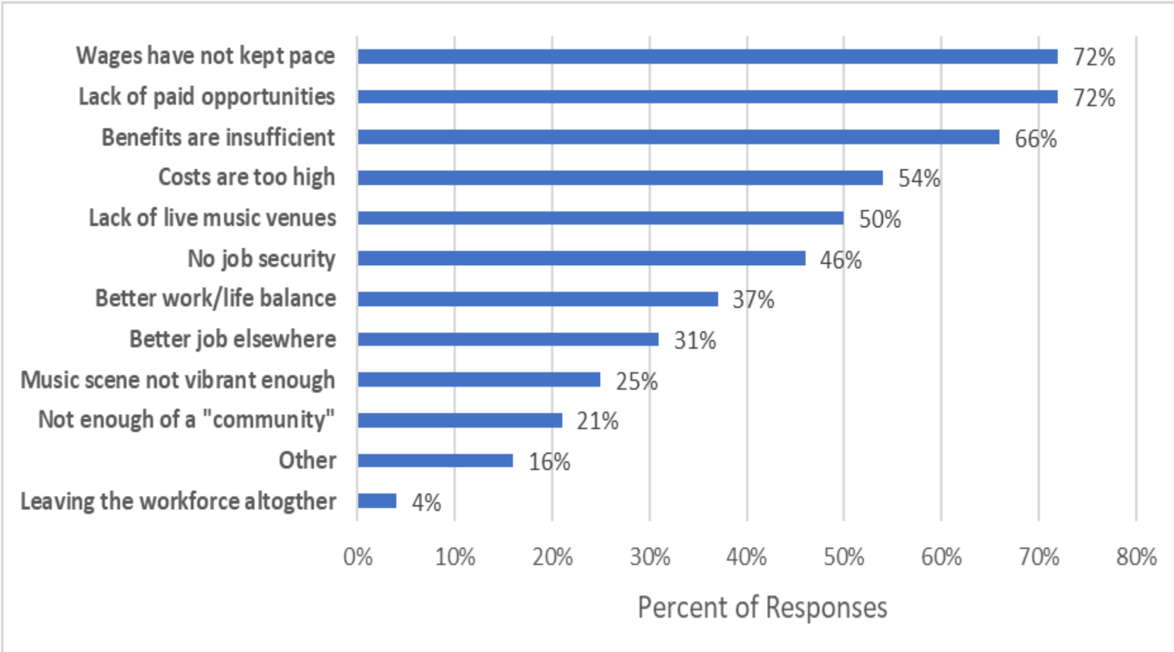
Figure 18. Intention to stay in BC to pursue a music career (music professionals)



"I wish I could afford to stay here but I can't. My daily living expenses are unsustainable. It feels like the system is working against creatives who are contributing the cultural value that draws people to BC in the first place." – *Survey respondent*

According to survey results, the main reasons for leaving the music industry include the fact that wages have not kept pace with the high cost of living in parts of BC and a lack of paid opportunities. Other commonly cited reasons for leaving include the fact that benefits are insufficient or non-existent, the costs of touring, production or other costs are too high relative to income, and there is a lack of live music venues.

Figure 19. Reasons for leaving the music industry (music professionals)



Consultations with music professionals add more colour to these findings. During the music professionals focus group and industry stakeholder consultations, a number of people noted that they had found it difficult to access grant funding. While many appreciated the flexibility of grant opportunities, particularly recent opportunities, they also pointed to difficulties in finding the time to apply for grant funding, not knowing how to access funding or how to generate a successful application, and/or frustrations around the lack of feedback related to unsuccessful applications. Others identified the need for more grant opportunities for new entrants into the industry (i.e. people who are just starting out and may not yet have an established a name for themselves). It is important to note that new entrants are eligible for funding under the BCMF and now Amplify BC as long as they have 2 years of professional experience. If they lack this experience, they are encouraged to find a mentor or partner with 2 years of experience. However, a number of focus group participants noted that this was a fairly unique and innovative feature when compared to other grant opportunities.

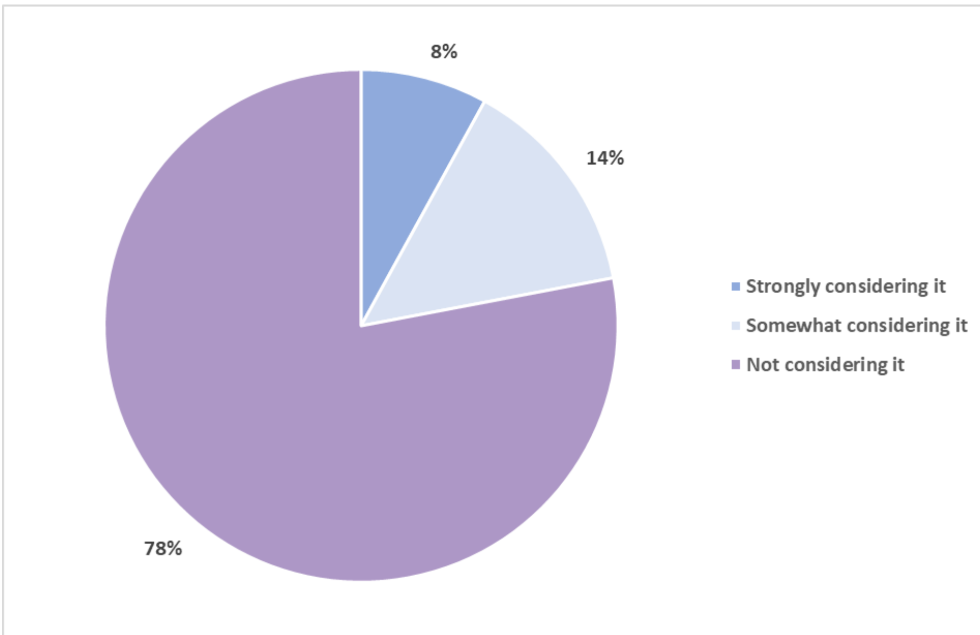
In terms of funding, although it has been great as of late to have access to the BC Music Fund and now Amplify, it's difficult for independent music producers like myself to set aside the amount of time and resources needed to properly fill out an application. It would be great to have access to help to successfully execute an application. *– Industry stakeholder*

Findings related to intentions to leave the music industry altogether or to pursue a music career outside BC are not inconsistent with earlier analysis. As noted above, many people have experienced an increase in income. However, 26% saw their incomes drop this year. While more than half of respondents report working more hours in the past 12 months compared to previous years, 20% reported spending fewer hours on their paid music work. In other words, at least a fifth of the industry may not have benefited from recent growth.

***Finding*: Despite increases in revenue among music businesses, over a fifth of music businesses anticipate re-locating outside of BC.**

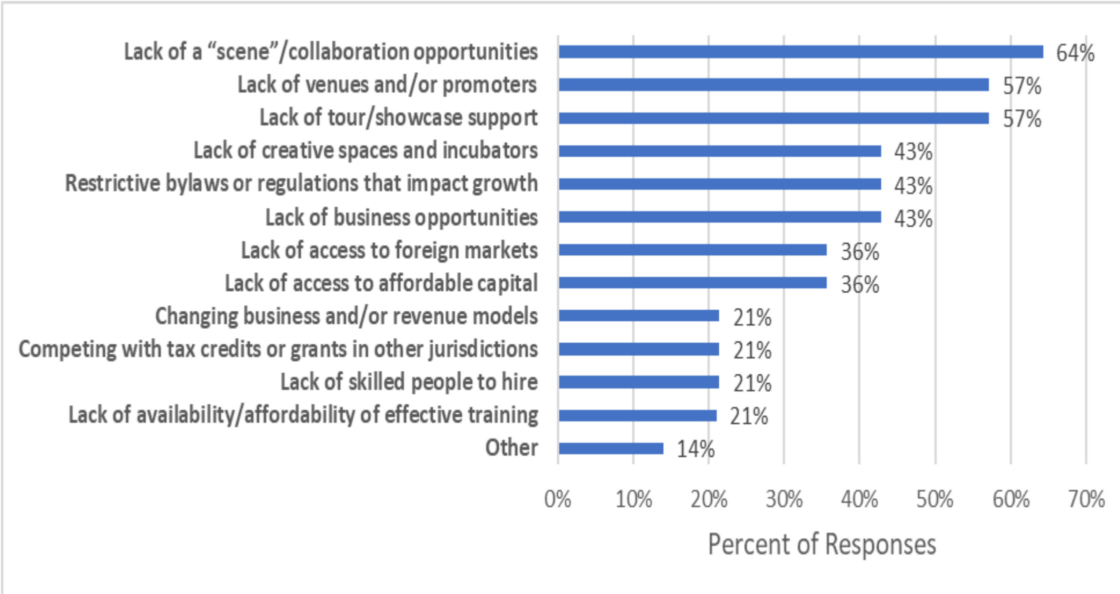
Survey results reveal that approximately 22% of music businesses are strongly or somewhat considering re-locating outside of BC. There was no significant difference across business types.

Figure 20. Intention to re-locate outside BC (music businesses)



The most commonly cited reasons for re-locating outside of BC included a lack of a "scene"/collaboration opportunities, lack of venues and/or promoters, lack of tour/showcase support, lack of creative spaces and incubators, and restrictive bylaws or regulations that impact growth.

Figure 21. Reasons for locating outside of BC (music businesses)



The relocation of music businesses and the exit or relocation of music professionals are potentially mutually reinforcing dynamics. As music professionals leave BC's music industry, the music scene becomes increasingly less vibrant, a major push factor for music businesses. As music businesses leave the province, they take paid work opportunities with them, leading to higher competition for fewer opportunities and ultimately driving down wages/compensation for music professionals. This in turn pushes more music professionals out of the industry or, at minimum, out of the province, leading to an even less vibrant music scene. And so on.

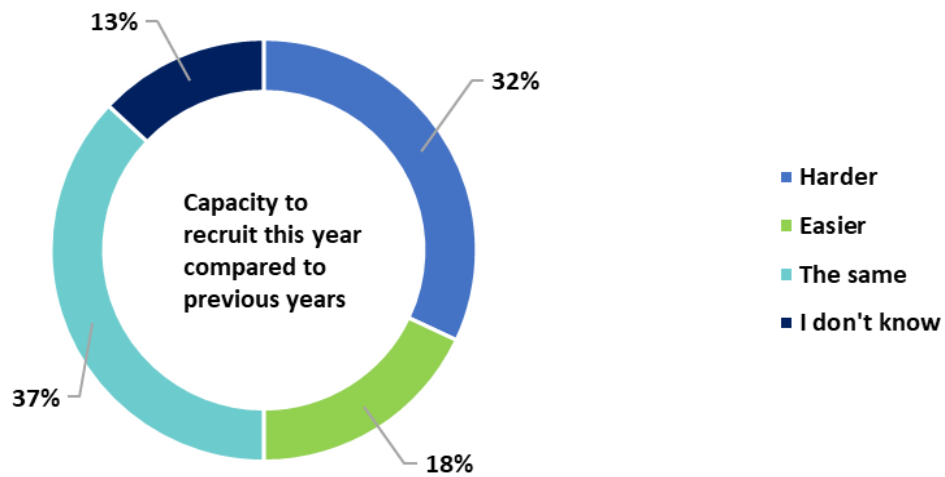
"We need to build a better network and programs/platforms that help attract and retain more talented/skilled business professionals in the industry, which would in turn help grow existing companies and create new companies. And this in turn would help generate more revenue for the industry in our province and provide more opportunities for career growth…If we do not find ways to improve in this area, industry jobs will go elsewhere." – *Survey respondent*

4.	What recruitment and retention challenges do music businesses face and what are the impacts of these challenges?

***Finding*: Close to half of music businesses experience challenges recruiting and retaining qualified people for music-related positions and about a third of businesses have seen these challenges intensify this year compared to previous years. These dynamics are having a business impact.**

About 46% of music businesses experience challenges when recruiting and retaining qualified people to fill music-related positions. About a third of businesses (~32%) are finding it significantly harder (~8%) or somewhat harder (~23%)[41] to recruit or find qualified people today compared to previous years. Responses were fairly evenly distributed across business types.

Figure 22. Capacity to recruit this year compared to previous years

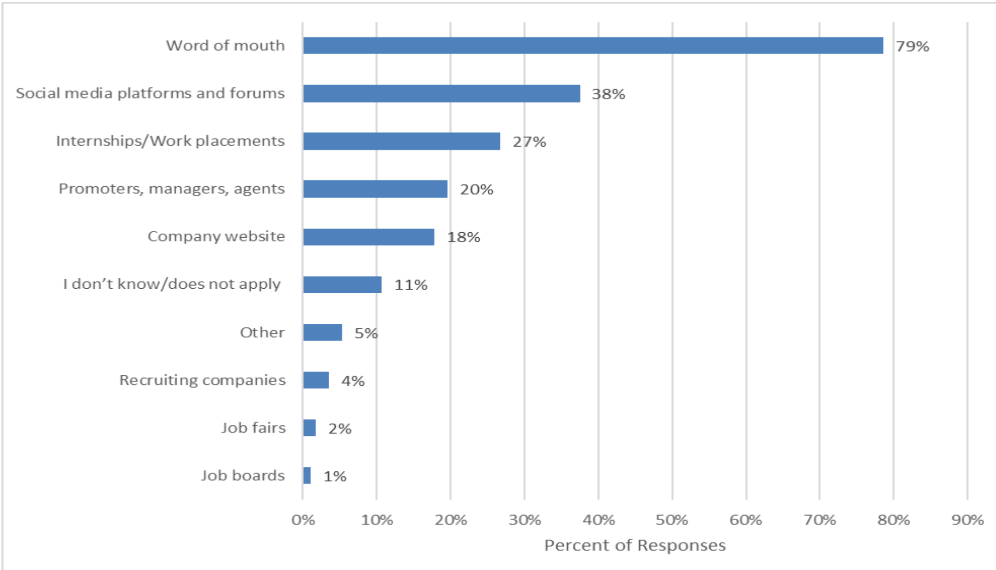


Interviews with music businesses revealed that the most common type of recruitment challenge was the ability to find people with the right skills and experience. Interviews with music businesses provided deeper insights into this finding with a number of interviewees pointing to the fact that face challenges finding people with "industry-ready" attributes, including the right mix of technical, business and soft skills.

In addition, one concern expressed during the interviews was a heavy reliance on word of mouth due in part to a lack of knowledge around how to find talented people to hire. Survey results confirm this finding and reveal that word of mouth is by far the most common way of finding people to fill music-related positions.

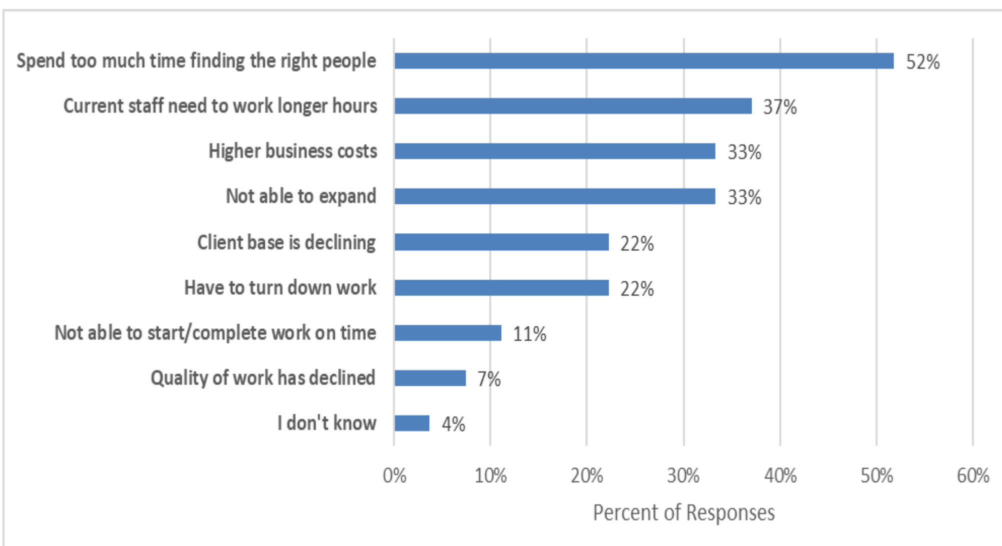
[41] Numbers may not add up due to rounding.

Figure 23. Strategies to fill music-related positions



These challenges are having a business impact. Music businesses reported having to spend a lot of time and energy on finding the right people and indicated that current staff had to work longer hours as a result of these challenges. They also pointed to an increase in the costs of doing business due to higher wages and/or benefits (a reflection in part of the high costs of living in parts of BC), an inability to expand, and having to turn down work as a result of recruitment and retention challenges.

Figure 24. Business impact of recruitment and retention challenges



5.	What are the barriers and pathways that influence the supply of labour in the industry?

Finding: **While the music industry in BC is considered to be fairly collaborative overall, a large majority (90%) of music professionals have experienced some type of barrier that has made it difficult for them to enter the industry or to advance in their careers.**

Interviews and focus groups shed light on many of the unique aspects of the province's music industry that music professionals and businesses value and cherish. Included among these is the space to grow and create in a fairly young market, the diversity of genres and people, the incredible talent that is drawn to living and working in BC, and the proximity to the West Coast of the United States. In addition, overall, the industry is considered to be fairly collaborative. Approximately 46% of survey respondents strongly agreed or agreed that the music industry in BC was collaborative and that generally speaking people are happy to work together and/or help build connections. This can be compared with 37% who neither agreed nor disagreed and 17% disagreed or strongly disagreed that the industry is collaborative.

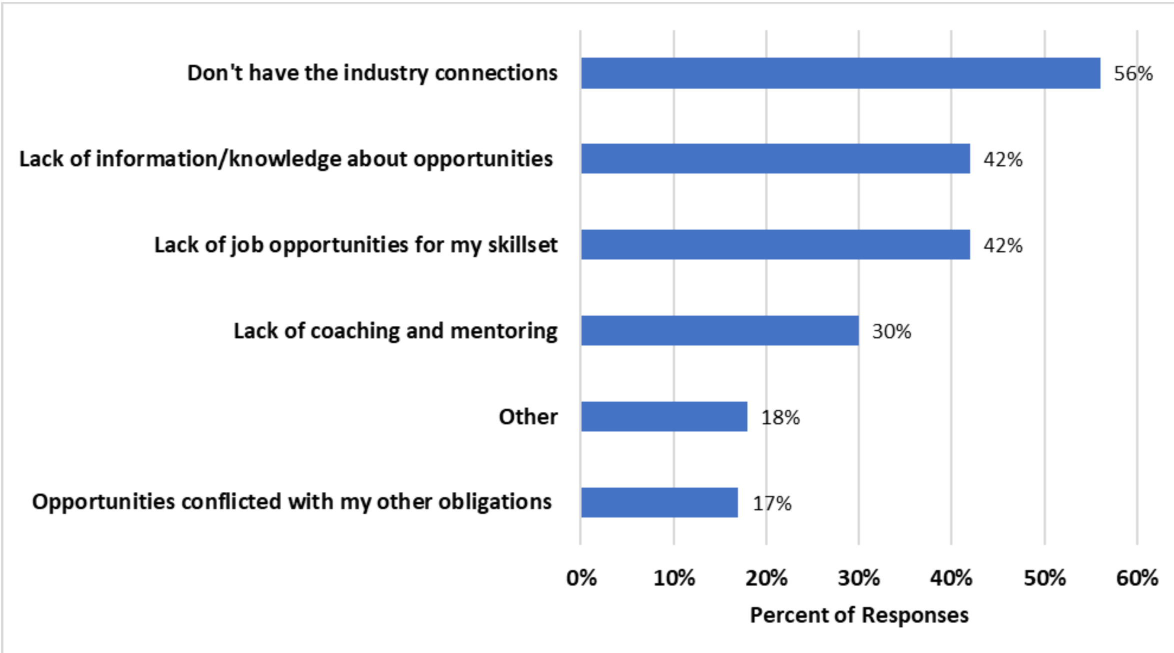
"We have the best talent in BC. There is something in the water here." *– Music professionals focus group participant*

Figure 25. Perspectives on collaboration within BC's music industry

Responses	Strongly agree or agree	Neither agree or disagree	Disagree or strongly disagree
The music industry in BC is collaborative. Generally speaking, people are happy to work together and/or help you build connections and find opportunities.	46%	37%	17%

Despite these positive attributes, almost 90% of survey respondents noted that they have experienced barriers that have made it difficult for them to enter the industry or to advance in their careers. The most common barriers to entry and advancement were a lack of industry connections ("I don't know the 'right people'; don't have industry connections"), lack of information or knowledge about opportunities, and a lack of job opportunities for the kinds of skills they have. Barriers were fairly consistent across genders, Indigenous and visible minority status, and age. It is important to note that an additional barrier was identified during focus group discussions with music professionals. This related principally to the challenges facing smaller acts when travelling to the United States (e.g. the West Coast) to perform. Focus group participants pointed to the labour intensive and costly visa application process as well as the fact that the visas offered to artists, entertainers and athletes provide limited flexibility, which means gig dates and venues need to be lined up well in advance and cannot change.

Figure 26. Barriers to entering and advancing in the industry



It is not altogether surprising that "networking" (i.e. "I don't know the 'right people'; don't have industry connections") is a common barrier for entry and advancement in the industry. Work in the industry relies heavily on who you know. As noted above, 80% of music businesses identified word of mouth as the recruitment tool they use the most. It is also interesting to note that many of the music businesses interviewed for this report noted that a lack of industry connections has been an obstacle to their success.

"It really is all about who you know in this industry. Who you know and your reputation. I know that's a cliché but it's a cliché for a reason." - *Music business interviewee*

At first glance, there appears to be disconnect between the relatively high levels of collaboration in the industry and the prevalence of barriers to entry and advancement. Survey responses, together with interview and focus group results, provide some insight into these apparent inconsistencies. Specifically, a number of survey respondents and a number of music business interview participants noted that music professionals and businesses in smaller cities are very collaborative but that they feel isolated from the Lower Mainland and Vancouver Island. Others pointed to the existence of genre-based cliques that make working across genres challenging.

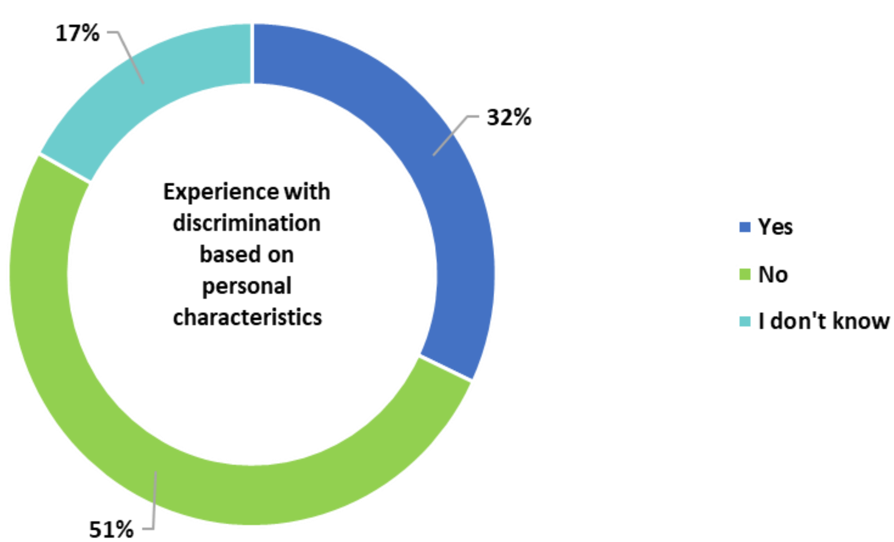
"Industry professionals in my community are very collaborative, but outside of our city we are not taken very seriously… I feel this attitude comes from expecting good art only from the south… I would encourage industry professionals of great influence to make serious efforts to see what is happening outside of the Lower Mainland/Island. The Central Interior is really booming artistically right now." - *Survey respondent*

"The industry still feels very segregated and isolated between genres … rock people with rock people, country people with country people, etc." – *Survey respondent*

Finding: **About a third of music professionals report experiencing discrimination based on personal characteristics, including sex, age, and race and ethnicity.**

Approximately a third (32%) of survey respondents report experiencing some form of discrimination in the industry based on personal characteristic.

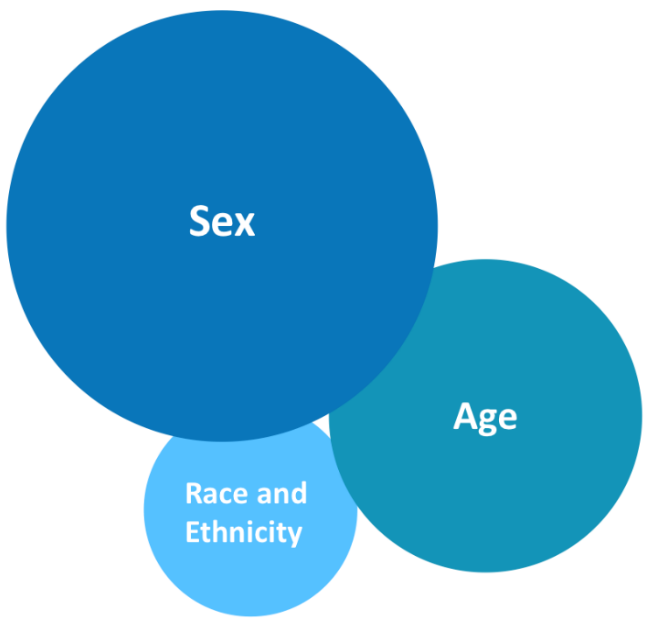
Figure 27. Experience with discrimination based on personal characteristics



“Some of us feel like there are gatekeepers in the industry, with the same small group of people running the show. It doesn’t always feel like they understand the challenges those of us on the margins face entering and succeeding in the industry.” – *Music professionals focus group participant*

Discrimination based on sex was by far the most common form of discrimination experienced by respondents and was most commonly reported by women. Specifically, 82% of the people who indicated that they had experienced discrimination based on sex were women. Age ranked as the second most common form of discrimination and was most likely to experienced by people between the ages of 25 and 34. Discrimination based on race and colour and national or ethnic origin was the third most common type of discrimination and was experienced most frequently by people who identified as a visible minority or Indigenous. Discrimination based on sex and race, colour, national or ethnic origin is most likely to be experienced by secondary creators. Primary creators are most likely to report discrimination based on age.

Figure 28. Most prevalent forms of discrimination in the music industry in BC



The survey findings around discrimination based on sex in the industry are consistent with earlier report findings around the demographics of the industry. As noted above, approximately 72% of the overall music industry in BC is male. This may suggest there are barriers facing women in entering and advancing in the industry that are not commonly experienced by men. These survey findings are also reinforced in the literature. The June 2018 study prepared for the Screen Composer Guild of Canada referenced earlier in this report found that female composers are excluded by productions of every size (e.g. TV, webseries, feature film, etc) and argued that hiring practices served as barriers to entry and advancement, noting that men have greater access to opportunities for personal interaction with directors than women and that this reduces women's chances of being hired. Furthermore, the study argues that women are also subject to chauvinism, sexual harassment and gender stereotyping.[42] A 2017 report commissioned by the East Coast Music Association, Music Canada and Music Canada Live on growth and development of Canada's East Coast music industry suggests that discrimination based on sex begins at an early age: the music industry is "set up for boys, for men, from childhood onward."[43]

"Age isn't an asset if you want to be a musician, particularly a performer. Youth is. If you haven't found a way in by 25, you're probably not going to. If you make it to 35, you've found a way to make aging work for you or at least to make it less relevant." *– Industry stakeholder interview*

"The industry is … still male dominated and it is, amazingly, difficult for the females to command the paid work. As a young woman, you are easily passed over as someone who is not strong enough/smart enough/generally capable enough to do good work." *– Survey respondent*

Survey findings related to discrimination based on age align with a number of resources on age and the music industry, most of which point to a general prejudice against aging, particularly among primary creators (e.g. performers).[44] Moreover, racial and cultural diversity in Canada's music industry has

[42] Gauthier, Benoit and Lisa Freeman. June 2018. *Gender in the Canadian Screen Composing Industry.* Prepared for the Screen Composers Guild of Canada. Available online at: http://www.omdc.on.ca/Assets/Research/Research+Reports/Screen+Composers+Guild+of+Canada/Gender+in+the+Canadian+Screen+Composing+Industry.pdf. A 2015 report prepared by Nordicity on behalf of Women in Music also found that women in the music industry in Ontario make less than their male counterparts and were less likely to hold executive positions. See: Nordicity. May 2015. A Profile of Women Working in Ontario's Music Industry. Prepared for Women in Music Canada.

[43] Myggland, Allison and Alex Clement. 2017. Striking a New A-Chord: Recommendations for the Growth and Development of Canada's East Coast Music Industry. Prepared for East Coast Music Association, Music Canada and Music Canada Live. Available online at: https://s3.amazonaws.com/eastcoastmusicassociation/documents/Atlantic-Canada-Music-Report-May18.pdf

[44] See, for example, Blanc, Lola. 3 June 2015. How Ageism Kills the Careers of Women in the Music Industry. Vice.

become a part of the national conversation in recent years.[45] Well-known BC artist, Tarun Nayar, has commented on what he sees as discrimination playing itself out "at live music venues, in corporate board rooms and on the festival circuit…" [46]

When considering how best to address these barriers, one common observation across the surveys, the interviews and the focus group conducted for this report related to the need to find the right pathways into and through the industry and to make these pathways accessible. In what follows, this report focuses on four of these pathways, including secondary and post-secondary education and training, internships and work placements, mentorship, and skills development opportunities.

***Finding:* High school and post-secondary education and training are important pathways into the industry.**

Thirty percent of survey respondents participated in music education classes or courses in a public high school in BC. Most of these respondents (73%) indicated that high school courses played a very significant (51%) or significant (23%)[47] role in encouraging them to pursue a career in the music industry.

The most common areas of focus for high school courses included instrumental music (i.e. concert band, jazz band, orchestral strings, and guitar) (77%), followed by choral music (i.e. concert choir, chamber choir and vocal jazz) (35%), music composition (28%) and music theatre (27%). Only 12% participated in music production, most of whom were men. Although the sample size is small and results should be interpreted with caution, this finding is consistent with earlier findings that women tend to be particularly under-represented in secondary creator occupations.[48]

Approximately two thirds of the industry have pursued music-related education or training at the post-secondary level. Of the music professionals who have pursued music-related education or training at the post-secondary level, over half (53%) indicated that this training was a critical factor for their entry into the industry (approximately 19%) or an important factor (35%). Overall, music professionals tend to work in the occupational clusters that most closely align with the education and training they pursued at the post-secondary level. This may further point to the relevance of their education and training for their career pathways. However, it is worth note that during consultations, a number of stakeholders indicated that the cost of post-secondary education made these programs inaccessible to many. In addition, women and men are almost equally likely to have pursued music-related post-secondary education and training. However, women are approximately half as likely as men to have pursued training and education focused on secondary creator occupations.[49]

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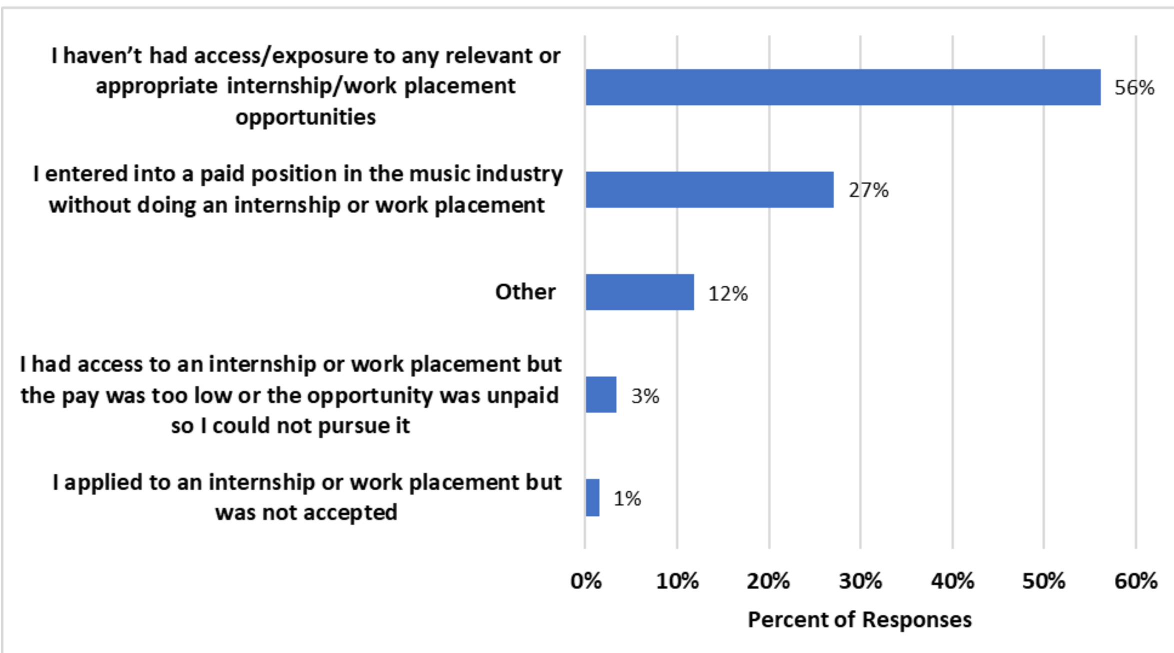
[45] See, for example, TVO. 25 July 2016. The politics of music: Why the Canadian music scene lacks diversity, and NOW Magazine, Racism in Music.
[46] Kurucz, John. 5 June 2017. Documentary examines discrimination in Vancouver's bhangra scene. Vancouver Courier.
[47] Numbers may not add up due to rounding.
[48] Sample size for this response option was small (n=10) so results should be interpreted with caution. Sample sizes were too small to make observations about the specific experiences of people who identify as Indigenous or a visible minority.
[49] Sample sizes were too small to make observations about the experiences of people who identify as Indigenous or a visible minority.

Finding: **While education is important, internships and work placements also provide key opportunities to enter and become established in the industry. However, a majority of music professionals have not participated in an internship or work placement, primarily due to a lack of access or exposure to relevant opportunities.**

Just over 20% of music professionals report participating in an internship and/or work placement opportunity in the music industry. The majority (80%) of these people found this experience to be a critical or important factor for their entry into the industry. More than half of the approximately 80% of respondents who have not participated in an internship or work placement pointed to a lack of access or exposure to relevant or appropriate opportunities.

"My internship was a vital foot in the door but these opportunities seem less and less accessible to younger people." – *Music professional focus group participant*

Figure 29. Reasons for not participating in a music-related internship or work placement program

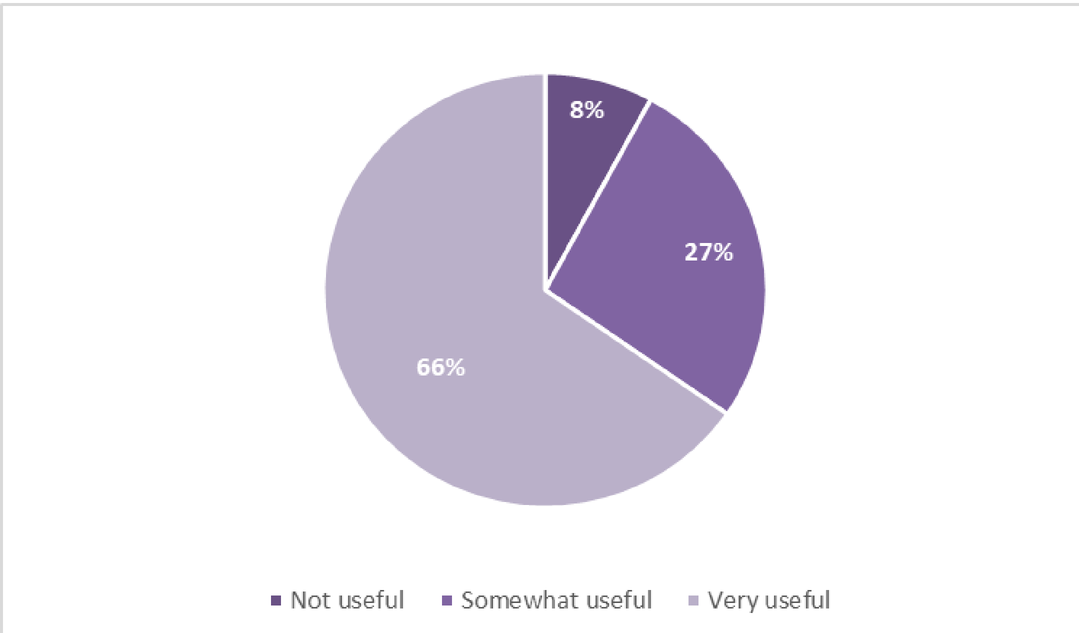


All the music professionals who participated in the focus group conducted for this report agreed that there would be value in developing structured internship and work placement programs in the province. Many stressed the importance of ensuring that these programs are subsidized.

***Finding:* Just over half of music businesses have provided internships and work placements. A large majority of these businesses have found these opportunities have helped them find talented people to work in their companies. Those music businesses that have not provided internships or work placements point to a lack exposure to interested individuals or limited awareness about opportunities.**

Music businesses were also asked about internships and work placements. Just over half (56%) reported that they have provided internship or work placement opportunities to individuals who are looking to pursue a career in the music industry. A large majority of these (93%) have found these very useful (66%) or somewhat useful (27%) in helping them find talented people to work with their companies.

Figure 30. Usefulness of internships/work placements (music businesses)



"I could really use help connecting to people who are interested in interning with my company." – Music business interviewee

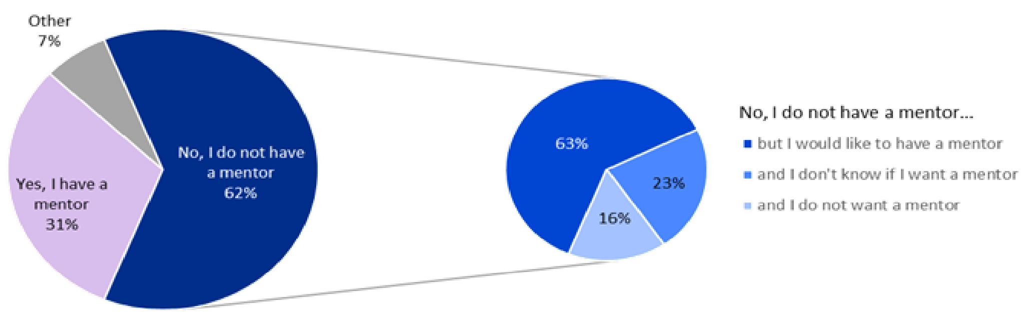
Close to 60%[50] of the music businesses that do not provide internships or work placements indicated that this was due to a lack of exposure to people who are interested in internships or a general lack of awareness about opportunities. All the music businesses interviewed for this report indicated that there would be value in developing a structured internship and work placement program and that they would most likely draw on such a program.

[50] Responses indicating "other" were dropped from this analysis.

***Finding:* Most music professionals think that having a mentor is very important for advancing in the industry. Many people who do not have a mentor would like one.**

Ninety-two percent of survey respondents indicated that they think mentorship is very important (73%) or somewhat important (19%) to advance in the music industry. (In this context, a mentor is a person with deep music industry knowledge who helps someone with less experience in the industry to grow both personally and professionally.) Just under a third (30%) of music professionals currently have a mentor and 62% of the people who do not have a mentor would like one. In addition, during focus group discussions, a number of music professionals pointed to the need for more opportunities to relate to other industry professionals one-on-one, rather than in a large group setting, in order to discuss more sensitive and personal issues about "life in the industry", including mental health concerns.

Figure 31. Prevalence of and demand for mentorship support for music professionals



The literature suggests that mentorships can provide critical career pathways, particularly in the creative industries as who you know is so vital for both entry and advancement. Like internships, they can help people enter into the industry. However, mentorships can also prove to be important throughout the course of an individual's career. In addition, there is evidence to suggest that mentorship can play a particularly important role in helping people to overcome barriers, including discrimination based on personal characteristics.[51]

"My mentor helped me get my first real gig and has continued to help me throughout the course of my career." – *Survey respondent*

[51] See, for example, Farchy, Isabel. 31 August 2017. Why is the UK creative industry still missing the most promising young people? It's Nice That.

The value of mentorships has been well-recognized by the industry. For example, one key initiative, Women in Music Management Mentorship Program by Watchdog Management provides a full-time six month paid mentorship for developing and/or aspiring women managers.[52] In addition, industry events like Breakout West offer one-on-one mentor meetings, which provide artists with the opportunity to meet face-to-face with industry leaders. These important initiatives notwithstanding, all music professional focus group participants agreed that there is a need for more accessible, structured mentorship programs in the province.

"I could really use a music-business mentor, particularly as we transition more of our work from not-for-profit to for-profit. I just don't know where to turn for that kind of help." – *Music business interviewee*

Research suggests that a business mentor can also be useful for music businesses. A 2010 study found that business mentoring may be particularly beneficial in the creative industries, noting that "creative practitioners have a preference for experiential learning, often in discursive, informal environments." [53] The study found that there is a particular need for mentorship in the creative industries because creative businesses tend not to tap into typical business networks or access traditional business supports due to the fact that "creative enterprises [view] themselves as a group apart from other business sectors, with different motivations, cultures and business models." Drawing on a number of external sources, it reports positive links between business mentoring and business growth.

The value of mentorship or mentorship-like services for music businesses has been well recognized and supported in BC. For example, Music BC's Phoenix program provides training and professional development support through advisors and mentors to music entrepreneurs in BC.[54] The BCMF and now Amplify BC's recently announced music company development program provide business development support with the aim of supporting sustainability and growth among music businesses. The BCMF/Amplify BC's live music programs offer the same types of support to live music companies. However, despite these valuable initiatives, all the music businesses interviewed for this report indicated that there would be value in developing a structured business-to-business mentorship program for the music industry.

[52] See: http://www.watchdogmgt.com/women-in-music-management-mentorship-program/
[53] Nesta. February 2014. Mentoring in the Creative Sector: Industry Insights.
[54] See: https://www.musicbc.org/programs/how-to-series/phoenix/

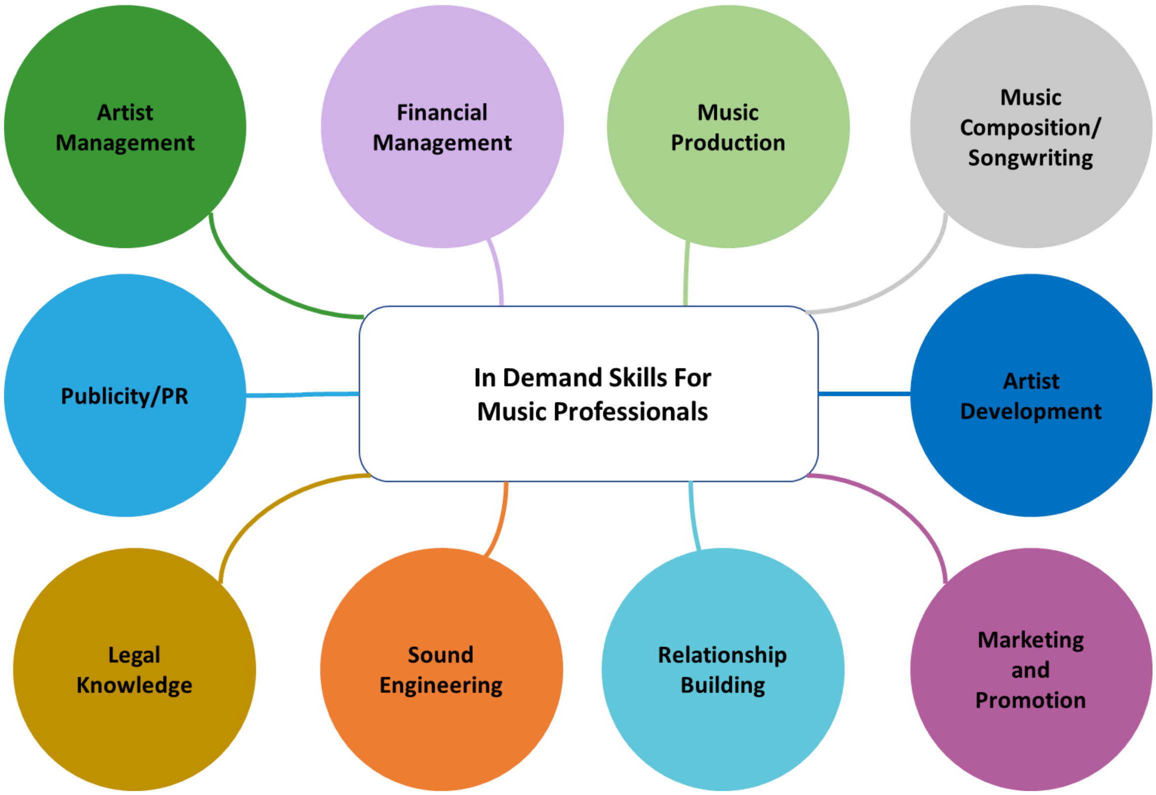
6.	What skills are in demand in the industry?

Finding: **Most music professionals (95%) would like to refine or develop their skills and most music businesses (75%) observe some type of skills gap in the workforce. In demand skills include a mix of industry-specific and more general business skills, as well as both hard and soft skills.**

Close to 95% of respondents to the music professionals survey indicated that they are interested in acquiring or refining their skills, while 75% of music businesses observed some type of skills gap among people who perform music-related functions in their companies or among people who apply for positions with their companies. In other words, there appears to be a demand for skills development across the industry.

In the survey and focus group, music professionals were asked which skills they would like to acquire or refine, while music businesses were asked which skills they require in their current workforce as well as the most common skills gaps observed among the people who perform music-related functions in their companies or among people to work with their companies. These responses were mapped to each other to uncover the most common areas of overlap. These include music production, music composition and songwriting, artist development, marketing and promotions (including digital marketing, etc), relationship building, networking and collaboration, sound engineering, legal knowledge, publicity and public relations (PR), artist management and representation, and financial management (including how to do taxes, etc).

Figure 32. In demand skills for music professionals



It is interesting to note that the skills identified above represent a combination of industry-specific skills (e.g. music composition and songwriting) and more general business skills (e.g. financial management). They also represent a mix of technical or hard skills (e.g. sound engineering) and soft skills (e.g. relationship-building, networking and collaboration).

***Finding:* Most (over 80%) of music businesses identified the need for professional development skills or other support programs to help them grow their businesses.**

Over 80% of music businesses identified the need for some professional skills development or other support to help grow their business. Effective marketing and social media communications, building the company brand, advanced communication skills for managers, accelerating team performance and building revenue, and performance management were the five most common survey responses.

Figure 33. Top five professional development skills and support required by music businesses

In short, there appear to be opportunities to help build a wide range of skills across the industry. However, as noted earlier, skills development can be a challenge in a gig economy where the traditional employer-employee relationship does not typically apply and where, consequently, employer-led/supported skills development and training opportunities need to be sought elsewhere. This points to the critical role of industry associations and other stakeholders in providing training and upskilling opportunities.

BC's music industry has long recognized this important role and frequently offers training and development programs for music professionals and businesses. Music BC's Phoenix program and Amplify BC's new music company development program, both cited earlier in this report, offer examples of industry-led training and development support for music businesses. In addition, the BCMF and now Amplify BC's live music programs offer similar programming for live music companies. Music BC's *How-to Series* also provides professional development discussions and workshops to musicians and industry professionals on an on-going basis.[55]

[55] See: https://www.musicbc.org/programs/how-to-series/

However, despite these important initiatives, there continues to be a demand for skills development from both music professionals and music businesses. During the music professionals focus group discussions, music professionals emphasized the value in many of the industry-led training they had undertaken and asked for more frequent and focused training, including in smaller group settings. All the music businesses interviewed for this report pointed to the value of developing more structured training and skills development opportunities. In addition, survey responses and interviews also revealed the need to make skills development and training opportunities more accessible to communities outside of Vancouver.

"In BC, it is very difficult for people living in Northern communities to access opportunities for education and advancement in the field. … Northern communities are therefore disadvantaged when it comes to exposure to current trends, new technologies, and the music industry in general." – *Survey respondent*

6. Ideas for moving forward

A number of preliminary ideas for moving forward are presented here. These preliminary ideas represent a mix of insights emerging from the analysis undertaken for this report but, principally, they reflect the priorities identified by the hundreds of music professionals, music businesses and other stakeholders that were consulted throughout its preparation. These ideas have not been subjected to a rigorous feasibility assessment, nor have they been considered within the context of a broader review of existing initiatives. Instead, they are presented here as ideas that merit further exploration. They are organized around two broad themes:

1. Make opportunities across the industry more accessible
2. Continue to support and develop the industry's talent base

Figure 34. Ideas for moving forward

Make opportunities across the industry more accessible

- **Increase the participation of women, Indigenous people and visible minorities in occupations across the industry.**

The industry's workforce includes a lower proportion of women, people who self-identify as Indigenous and visible minorities than the provincial economy. Beyond the inherent value in ensuring fairness and equality, there is a business case for working toward diversity and inclusion, which may help improve business performance, attract talented people, inspire the creation of new genres and draw in larger audiences. While each demographic may require a different outreach strategy, there are opportunities to increase participation of these groups across the industry.

In particular, efforts could be made to attract more women and visible minorities into secondary creator positions, where they are most acutely under-represented, starting with but not limited to promoting participation in high school courses and post-secondary programs focused on secondary creator occupations. It is also critical to address discrimination in secondary creator occupations as experiences of discrimination based on sex, race, colour and national or ethnic origin is most common in this occupational cluster.

- **Make grant opportunities more accessible to a wider range of potential participants.**

Opportunities appear to have increased recently for a portion of music professionals and the businesses that rely on their services. Access to funding through the BC Music Fund initiated in 2016, together with other grant opportunities, is among the reasons cited for this increase. However, many people have not benefitted from growth opportunities and are considering transitioning out of the industry altogether or leaving BC to pursue their music careers elsewhere. A portion of music businesses are also considering re-locating outside of the province. The music professionals focus group and interviews with music businesses revealed that many feel they are not able to access grant opportunities, primarily because they feel they do not have the skills, experience or resources to complete the application process or because they do not have enough knowledge of opportunities. The latter was a particular concern among professionals and businesses located in smaller communities outside of the Lower Mainland. Others pointed to a lack of opportunity for feedback on unsuccessful applications as well as the need for grant opportunities for new entrants into the industry (i.e. people who are just starting out and may not yet have an established a name for themselves). There may therefore be value in exploring options to make grants more accessible across the industry and the province.

- **Create an online platform to share knowledge and information about paid work and collaboration opportunities across the industry in BC.**

Music professionals indicated that lack of knowledge and information served as a barrier to finding paid work and collaboration opportunities. Music businesses also indicated that they relied heavily on *word of mouth* as a recruitment tool, in part because they are not always clear on how to find talented people to hire. One suggestion, referenced frequently by both music professionals and music businesses, was to create a curated, community-managed, web-based job posting platform available to both music professionals and the businesses looking to hire them in real-time. Such a platform could also provide a forum for sharing information on collaboration opportunities as well as serve as a directory of music professionals and music businesses offering their services.

- **Create more opportunities for internship and work placements across the industry**

Internships and work placements offer important pathways into the industry and may help overcome some of the barriers to entry that are prevalent in the industry. They also provide useful opportunities for music businesses to find and retain talented people. However, a majority of music professionals have not participated in an internship or work placement, primarily due to a lack of access or exposure to relevant or appropriate opportunities. All the music professionals focus group participants agreed that there would be value in developing structured internship and work placement programs in the province. Many stressed the importance of ensuring that these programs were subsidized.

Those music businesses that have not provided internships or work placements pointed to a lack of exposure to interested individuals or limited awareness of opportunities. All the music businesses interviewed for this report indicated that there would be value in developing a subsidized and structured internship and work placement program and that they would most likely draw on such a program.

- **Continue to support networking across the industry, including in communities outside of Vancouver**

The music industry is a who you know industry. Not having the right connections in the industry was identified as the most common barrier among music professionals. Music businesses also stressed the importance of industry connections. These findings point to the need to continue to create networking opportunities for both music professionals and music businesses and to expand these beyond the Lower

Mainland and Victoria. This may also help address concerns that the music industry at times feels cliquey and would benefit from building a stronger sense of community.

- **Create structured mentorship opportunities for both professionals and businesses**

Like internships and work placements, mentorship can also provide a key support as music professionals enter and move through the industry. During focus group discussions, a number of music professionals pointed to the need for more opportunities to relate to other industry professionals one-on-one, rather than in a large group setting, in order to discuss more sensitive and personal issues about life in the industry, including mental health concerns. Yet, despite the value of mentorship opportunities, only a third of music professionals have a mentor and most people who have a mentor would like one. In this regard, all music professional focus group participants agreed that there is a need for more structured mentorship programs in the province.

Most of the music businesses interviewed for this report did not have a business mentor but those who did indicated that having a business mentor has proven to be crucial to their success. Those who did not have a business mentor pointed to a lack of exposure to mentorship opportunities. All music business interviewees indicated that there would be value in developing a structured business-to-business mentorship program. In short, there may therefore be opportunities to develop more structured, affordable and accessible mentorship programs for both music professionals and businesses across the province.

- **Broaden skills development opportunities for both professionals and businesses across the province**

In a gig economy, the traditional employer-employee relationship does not apply and the onus of seeking out training and skills development opportunities often falls to the individual. Under this working arrangement, industry associations and other stakeholders may play a particularly crucial role in providing training and up-skilling opportunities. In BC's music industry, high quality skills development supports are already available through a number of industry organizations. However, there continues to be a demand for skills development from both music professionals and music businesses. In this regard, during the music professionals focus group discussions, participants emphasized the value in many of the industry-led training opportunities they had pursued and asked for more frequent and focused training, including in smaller group settings. In addition, all the music businesses interviewed for this report pointed to the value of developing more structured training and skills development opportunities. There may therefore be opportunities to explore expanding and delivering a broader range of training opportunities across the province with a focus on both industry-specific skills (e.g. music composition and songwriting) and more general business skills (e.g. financial management) as well as technical or hard skills (e.g. sound engineering) and soft skills (e.g. relationship-building, networking and collaboration).

In addition, a number of stakeholders indicated that they were unable to access the training and skills development opportunities that are available in the industry because these tend to take place in Vancouver and travel costs are prohibitive. There may therefore be opportunities to ramp up delivery of existing and new training and skills development programs to more isolated communities, either through local delivery, streaming or additional travel funding for in-person participation.

Continue to support and develop the industry's talent base

- **Create more opportunities for collaboration between the innovation companies and the music industry across the province**

Research conducted for this report suggests that there is a link between the health of a city's music scene and the ability of innovation companies to attract and retain innovative and creative talent. Interviews with innovation companies pointed to the need to deepen connections and create more collaboration opportunities with the music industry. It may, therefore, be worth exploring opportunities to deepen collaboration between the music industry and innovation companies in communities across the province, possibly in the form of partnerships.

- **Create more opportunities for collaboration with "sibling" creative industries**

The film industry in BC contributed $ 3.4 Billion to the provincial economy in 2017.[56] Focus group discussions with music professionals indicated that this creates significant opportunities for film composers, commercial musicians, music publishers and artist managers seeking outlets for their skills, catalogs and performances. Likewise, major synergies emerge from the ancillary services of set designers and construction, lighting, staging, costumes, legal and accounting services, and an array of other servicers that are relevant for both the film and music industries. Creating, supporting and promoting better cross-industry collaboration with "sibling" creative industries that are already thriving in the province, such as film, animation, effects, gaming and others may help create more opportunities for music professionals in BC to showcase their work and may offer an array of applicable creative and technical skills to other industries that produce entertainment content.

- **Promote BC music talent at home and abroad**

Survey results and findings from the focus group with music professionals indicated that there is a need for greater promotion of BC's talent at home and abroad. Several survey and focus group participants pointed to the need to develop a "one-stop shop", starting with a website, for information about live music across the province to make it easier for music fans to learn about and access live music. Another common suggestion related to the need to better promote BC music and musicians in the United States. Focus group participants pointed to the potential value in a trade mission for music, similar to a recent trade mission conducted for BC's film and TV industry, to encourage partnerships with key industry clients in the United States. This may also provide an opportunity to explore options to make it easier for BC artists to obtain visas to perform at venues across the border.

- **Create more opportunities for BC artists to support international acts**

A number of survey participants as well as music professional focus group participants expressed the need for a policy requiring all major international acts/headliners, performing music in medium (up to 1000 attendance) to large (1000+ attendance) commercial venues, to hire a BC-based artist to open as a support act to their shows. This approach would create live performance experience and audience exposure opportunities for local artists striving to build their fan bases across the province.

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[56]See: https://www.creativebc.com/2018/07/16/press-release-bcs-motion-picture-industry-contributes-34b-to-the-provincial-economy.php

- **Establish music incubators in urban centres across the province**

The importance of developing a series of provincially funded music incubators in key urban centers in BC was a fairly common theme in survey responses. Incubators would provide new artists and music industry professionals with a unique and flexible combination of career development resources and infrastructure (e.g. affordable real estate spaces to create and build businesses) to help them grow through the often difficult early stages of their trajectory in the music industry. Music incubators would meet a variety of needs, which may include job creation, fostering the music industry's entrepreneurial climate leading to business creation and retention, and encouraging under-represented groups (i.e. women, Indigenous people and people who identify as a visible minority) to participate in the industry. Incubators could provide music communities with much needed mentoring, networking, and collaboration opportunities while addressing such topics as artist development, social media/marketing, management, promotion, publicity, funding, touring, production, recording, and mental health and addiction challenges.

Annex 1. Music professionals survey

Survey dissemination

Both the music professionals and music businesses survey were shared with over 30 industry networks or forums for dissemination via email, Twitter and/or Facebook. In addition, targeted emails were sent to over 200 individual contacts representing sound recording studios, audio technicians, video game companies, film and video production companies, live music venues, booking agents and managers, record labels, music producers, musicians and music managers and other industry stakeholders in BC. In most cases, forums and individuals were contacted multiple times.

Survey representativeness

Survey representativeness compared to industry overall (2016 Census data)

Personal characteristic	Number of respondents to relevant question (music professionals survey)	Percentage of respondents (music professionals survey)	Industry representation[57]
Women	110	37%	31%
Self-Identify as Indigenous	8	3%	2%
Identify as Visible Minority	35	12%	22%

Location of respondents to music professionals survey

Location	Number of respondents to relevant question (music professionals survey)	Percentage of respondents to (music professional survey)
Vancouver	127	43%
Victoria	14	5%
Elsewhere in BC	155	52%

[57] Source: Statistics Canada, 2016 Census of Population, custom data request through the B.C. Labour Market Information Office. Survey weights were applied to this calculation.

Landing Page

1. I am responding as:

a. A **music professional** based in British Columbia (I work for a music-related company/organization/institution, I am self-employed in the music industry without paid help (this includes one-person incorporation, unincorporated or sole proprietor of a music-related business), and/or I am a freelancer who generates at least some of my income from the music industry).
b. A **representative/owner of a company, business, organization or other entity** that employs music professionals (in addition to the owner - this can include self-employed with paid help) and that is based in British Columbia.

Personal profile

2. How old are you?
    a. 16 to 24 years old
    b. 25 to 34 years old
    c. 35 to 44 years old
    d. 45 to 54 years old
    e. 55 to 64 years old
    f. 65 years old or older
    g. Prefer not to say

3. What is your gender?
    a. Female
    b. Male
    c. Other
    d. Prefer not to say

4. Do you self-identify as an Indigenous person (First Nations, Métis or Inuit)?
    a. Yes
    b. No
    c. Prefer not to say

5. To ensure we represent the views of BC's diverse population, which of the following do you identify as your ethnic or cultural background? (Please select all that apply. Note that these categories align with the 2016 Census.)

    a. White
    b. South Asian (e.g. East Indian, Pakistani, Sri Lankan, etc)
    c. Chinese

d. Black
e. Filipino
f. Latin American
g. Arab
h. Southeast Asian (e.g. Vietnamese, Cambodian, Laotian, Thai, etc)
i. West Asian (including Iranian, Afghan)
j. Korean
k. Japanese
l. Prefer not to say
m. Other - please specify

6. What are the first three digits of your postal code?

Enter here: ________

Work Profile

7. What best describes your *primary* role in the music industry (where "primary" refers to the main source of your *music-related* income)? (Select only one.)
   a. Conductor, composer, lyricist and/or arranger
   b. Musician and/or singer
   c. Producer (including record producer, stage director/producer in the performing arts, multimedia audio producer, radio producer, music editor, music video producer, music related TV, film and advertising producer, video game audio production)
   d. Audio recording technician for music (including sound engineer, recording studio operator or music/sound mixer)
   e. Music technology specialist (including programmer, developer, coder, or software engineer)
   f. Entertainment lawyer or legal assistant
   g. Music supervisor
   h. Music journalist
   i. Music manager, agent, or promoter
   j. Music festival producer/organizer responsible for booking acts
   k. Live music venue manager/organizer responsible for booking acts
   l. Music-related publicist
   m. Music publisher
   n. Marketing and promotions (including content marketing / social media marketing)
   o. Record label executive/representative
   p. Music broadcaster (radio, other media)
   q. Performance rights expert
   r. Music association employee/representative
   s. Music educator/teacher
   t. Other. Please specify: ______________________________________

8. What additional paid work do you pursue in the music industry, if any? (Select all additional roles that apply.)
    a. Conductor, composer, lyricist and/or arranger
    b. Musician and/or singer
    c. Producer (including record producer, stage director/producer in the performing arts, multimedia audio producer, radio producer, music editor, music video producer, music related TV, film and advertising producer, video game audio production)
    d. Audio recording technician for music (including sound engineer, recording studio operator or music/sound mixer)
    e. Music technology specialist (including programmer, developer, coder, or software engineer)
    f. Entertainment lawyer or legal assistant
    g. Music supervisor
    h. Music journalist
    i. Music manager, agent, or promoter
    j. Music festival producer/organizer responsible for booking acts
    k. Live music venue manager/organizer responsible for booking acts
    l. Music-related publicist
    m. Music publisher
    n. Marketing and promotions (including content marketing / social media marketing)
    o. Record label executive/representative
    p. Music broadcaster (radio, other media)
    q. Performance rights expert
    r. Music association employee/representative
    s. Music educator/teacher
    u. I do not pursue additional work in the music industry
    v. Other. Please specify: ______________________________________

9. Is your music-related work your primary source of income?
    a. Yes
    b. No
    c. Other. Please specify:______________________________________

10. What best describes your current *music-related* employment arrangement? (Select only one.)
    a. I am self-employed (freelance, contract-based, and/or one-person incorporation, unincorporated or sole proprietor)
    b. I have a consistent position with a music-related company (either part-time, full-time, salaried or hourly)
    c. I have a consistent position with a music-related company and I also pursue freelance work in the music industry
    d. I am an intern or I am on a work placement with a music-related company
    e. Other. Please specify:____

11. For your music-related work, what best describes the kind of company/organization/entity that you work for/with? (Select all that apply)
    a. Solo artist or band
    b. Live music venue and/or festival
    c. Music technology company
    d. Sound recording studio
    e. Record label
    f. Radio, television, other media broadcaster
    g. TV, film and advertising production company, producing music-related content
    h. Video game production company
    i. Music marketing/promotion company (including social media)
    j. Entertainment law firm focused on the music industry
    k. Music publicist company
    l. Booking agency
    m. Music/artist management company
    n. Music publishing company
    o. Performance rights organization
    p. Music association
    q. Music journalism
    r. Music-related education institution
    s. Other:____
    t. None of these.

Income and hours

12. What was your total personal music-related income (from all your music-related revenue streams) last year (before tax)?
    a. Under $5,000
    b. $5,000 to $19,999
    c. $20,000 to $39,999
    d. $40,000 to $59,999
    e. $60,000 to $79,999
    f. $80,000 to $99,999
    g. $100,000 to $149,999
    h. $150,000 to $199,999
    i. $200,000 to $249,000
    j. $250,000 or more

13. How would you describe your music-related income in the past 12 months compared to previous years?

    a. Significantly higher

b. Higher but not by much
c. The same
d. Lower but not by much
e. Significantly lower
f. I don’t know

14. How would you describe the number of hours you have spent on your *paid* music work in the past 12 months compared to previous years?

    a. Significantly more hours this year
    b. More hours this year but not by much
    c. The same number of hours this year compared to previous years
    d. Fewer hours this year but not by much
    e. Significantly fewer hours this year compared to previous years
    f. I don’t know

15. How long have you been engaged in *paid* work in the music industry in BC?

    a. Less than a year
    b. 1 to 5 years
    c. 6 to 15 years
    d. More than 15 years

16. At what age did you start working in the music industry in BC?

Enter response here: __________________

Attraction and retention

17. How would you describe your ability to find *paid* work in the music industry at the wages you expect this year (i.e. in the past 12 months) compared to previous years?
    a. It’s easier to find paid work
    b. The same
    c. It’s harder to find paid work
    d. I don’t know

18. Are you currently considering leaving the paid music industry?
    a. Yes, strongly considering it
    b. Yes, considering it somewhat
    c. No, not currently considering it

19. <u>If (yes strongly, yes considering it)</u>, when do you expect to leave the paid music industry?
    a. Within the next year
    b. Within 1 to 2 years
    c. More than 2 years from now
    d. I don't know/I'm not sure

20. <u>If (yes strongly, yes considering it)</u>, why are you considering leaving the paid music industry? (Select the top three reasons.)
    a. Wages have not kept pace with the cost of living
    b. Benefits are insufficient or non-existent
    c. Costs of touring, production or other costs are too high relative to income
    d. There's no job security
    e. There is a lack of paid opportunities
    f. There is a lack of adequate live music venues
    g. There is not enough of a music "community"
    h. The music scene is not vibrant enough
    i. I want better work/life balance
    j. I can get a better job for the same type of work in another industry
    k. I'm leaving the workforce altogether (for example, retiring)
    l. Other. Please specify:______________________________________

21. <u>If (no)</u>, do you intend on staying in BC in the foreseeable future to pursue your music career?
    a. Yes
    b. No
    c. I don't know

22. <u>If (no)</u>, where will you go to pursue your music career?
    a. To Ontario
    b. To Québec
    c. To another province in Canada other than Ontario or Québec
    d. To the United States
    e. I don't know
    f. Other. Please specify:_______________________________________

<u>Education, training and skills</u>

23. Did you attend (or are you currently attending) a public high school in BC?
    a. Yes
    b. No

24. If yes, did you participate in any of the music education classes/courses offered by your high school?
    a. Yes
    b. No

25. If yes, what best describes the focus of your high school music education? (Select all that apply.)
    a. Musical theatre
    b. Choral music (includes concert choir, chamber choir, and vocal jazz)
    c. Contemporary music
    d. Music composition
    e. Music production
    f. Instrumental (includes concert band, jazz band, orchestral strings, and guitar)
    g. Music industry career exploration
    h. Other. Please specify:_________________________________

26. If yes, how significant a role did these high school classes/courses play in encouraging you to pursue a career in the music industry?

    a. Very significant
    b. Somewhat significant
    c. Not significant
    d. I don't know
    e. Other. Please specify:____

27. What best describes the type of music-related education or training that you received at the post-secondary level (college, university, technical institution), if any? (Select all that apply.)
    a. Music composition and songwriting
    b. Music production
    c. Music publishing/licensing
    d. Sound engineering
    e. Music supervision
    f. Artist management/representation
    g. Publicity/PR
    h. Artist development
    i. Performance venue operation/management
    j. Stage production
    k. Music technology, hardware and software development
    l. Marketing and promotions (including social media)
    m. Entertainment law
    n. Legal knowledge (e.g. basic knowledge of contracts, licensing, etc)
    o. Sales
    p. Financial management/basic accounting/bookkeeping
    q. Presentation/communication skills

r. Organizing skills/scheduling
s. Relationship building/networking/collaboration
t. Other. Please specify:____
u. I have not pursued music-related education or training at the post-secondary level

28. If yes, would you say that this post-secondary education and/or training has been …
    a. A critical factor for your entry to the industry – you would not have been able to establish yourself in the industry without it
    b. An important factor – it made entering the industry easier for you, but you could have established yourself in the industry without it
    c. Not an important factor
    d. Other. Please specify: ____

29. Have you ever participated in an internship and/or work placement in the music industry?
    a. Yes
    b. No
    c. Other. Please specify:____

30. If yes, would you say an internship and/or work placement has been …

    a. A critical factor for your entry to the industry – you would not have been able to establish yourself in the industry without it
    b. An important factor – it made entering the industry easier for you, but you could have established yourself in the industry without it
    c. Not an important factor
    d. Other. Please specify: ____

31. If no, why have you not participated in a music-related internship or work placement?

    a. I haven't had access/exposure to any relevant or appropriate internship/work placement opportunities
    b. I applied to an internship or work placement but was not accepted
    c. I had access to an internship or work placement but the pay was too low or the opportunity was unpaid so I could not pursue it
    d. I entered into a paid position in the music industry without doing an internship or work placement
    e. Other. Please specify ____

32. What skills are you interested in acquiring or refining as a music professional, if any? (Please select all that apply.)
    a. Music composition and songwriting
    b. Music production
    c. Music publishing/licensing
    d. Sound engineering
    e. Music supervision
    f. Artist management/representation
    g. Publicity/PR
    h. Artist development
    i. Performance venue operation/management
    j. Stage production
    k. Music technology, hardware and software development
    l. Marketing and promotions (including content marketing / social media marketing)
    m. Legal knowledge (e.g. basic knowledge of contracts, licensing, etc)
    n. Sales
    o. Financial management/basic accounting/bookkeeping
    p. Presentation/communication skills
    q. Organizing skills/scheduling
    r. Relationship building/networking/collaboration
    s. Other. Please specify:____
    t. I don't want to/need to acquire any additional skills or refine my existing skills

33. How important do you think mentorship (guidance provided by an experienced person) is to advancing in the music industry?
    a. Very important
    b. Somewhat important
    c. Not important
    d. I don't know
    e. Other. Please specify:____

34. Do you currently have a music industry mentor(s) (someone in the industry who has guided you along your career path)?
    a. Yes
    b. No
    c. Other. Please specify:____

35. <u>If no</u>, would you like to have a mentor?
    a. Yes
    b. No
    c. I don't know

Barriers

36. Have you experienced any barriers that have made it difficult for you to enter the music industry in BC or to progress/advance in your career in BC? (Please select all that apply and/or enter a response in other.)

    a. Don’t know the “right people”; don’t have the industry connections
    b. Lack of job opportunities for the kind of skills, education or training that I have
    c. Lack of information/knowledge about opportunities
    d. Lack of coaching and mentoring
    e. Employers reluctant to hire me due to a lack of experience
    f. Opportunities required work hours/scheduling that did not fit with other obligations I have (e.g. taking care of family)
    g. I have not experienced any barriers/challenges
    h. Other

37. Have you ever faced discrimination in the music industry based on personal characteristics?
    a. Yes
    b. No
    c. I don’t know

38. If you faced discrimination, please select the types of discrimination you experienced. (Select all that apply.)

    a. Age
    b. Sex
    c. National or ethnic origin
    d. Race and/or colour
    e. Religion
    f. Sexual orientation
    g. Mental or physical disability
    h. Family status
    i. Other. Please specify:____

39. To what extent do you agree with the statement: “The music industry in BC is collaborative. Generally speaking, people are happy to work together and/or help you build connections and find opportunities.”
    a. strongly agree
    b. agree
    c. neither agree nor disagree

d. disagree
e. strongly disagree

Future of the industry

40. Would you change anything about the music industry in BC in order to improve your long-term career prospects?

Please specify:____

Annex 2. Music businesses survey

Survey dissemination

Both the music professionals and music businesses survey were shared with over 30 industry networks or forums for dissemination via email, Twitter and/or Facebook. In addition, targeted emails were sent to over 200 individual contacts representing sound recording studios, audio technicians, video game companies, film and video production companies, live music venues, booking agents and managers, record labels, music producers, musicians and music managers and other industry stakeholders in BC. In most cases, forums and individuals were contacted multiple times.

Survey Representativeness[58]

Location of respondents to music professionals survey

Location	Number of respondents to relevant question (music business survey)	Percentage of respondents (music business survey)*
Vancouver	22	32%
Victoria	10	15%
Elsewhere in BC	36	52%

*Numbers do not add up due to rounding.

Landing Page

1. I am responding as:

a. A **music professional** based in British Columbia (I work for a music-related company/organization/institution, I am self-employed in the music industry without paid help (this includes one-person incorporation, unincorporated or sole proprietor of a music-related business), and/or I am a freelancer who generates at least some of my income from the music industry).
b. A **representative/owner of a company, business, organization or other entity** that employs music professionals (in addition to the owner - this can include self-employed with paid help) and that is based in British Columbia.

Profile[59]

[58] Note: The survey did not request information from respondents related to personal characteristics such as age, sex, Indigenous or visible minority status.
[59] Questions start at Q41 because both surveys were accessed through a single landing page.

41. What best describes your business?
    a. Solo artist or band
    b. Live music venue and/or festival
    c. Music technology company
    d. Sound recording studio
    e. Record label
    f. Radio, television, other media broadcaster
    g. TV, film and advertising production company, producing music-related content
    h. Video game production company
    i. Music video production company
    j. Music marketing/promotion company (including social media)
    k. Entertainment law firm focused on the music industry
    l. Music publicist company
    m. Booking agent
    n. Music/artist management company
    o. Music publishing company
    p. Performance rights organization
    q. Music association
    r. Music journalism
    s. Music-related education institution
    t. Other:____

42. How many people does your company employ (include full-time, part-time, temporary, contract and freelance employment)?
    a. 1 to 19 employees
    b. 20 to 99 employees
    c. 100 to 499 employees
    d. 500 plus
    e. I don't know

43. What are the first three digits of your company's BC postal code?

    Enter here:_____________

Growth and location

44. How much has your company's revenue changed in the past 5 years on average? (If your company has not been in business for 5 years or longer, please indicate revenue change since the company was founded.)

a. Increased by more than 25%
b. Increased by 1% to 25%
c. No change
d. Decreased by 1% to 25%
e. Decreased by more than 25%

45. How do you anticipate your company will grow over the next 5 years?

    a. Increase by more than 25%
    b. Increase by 1% to 25%
    c. No change
    d. Decrease by 1% to 25%
    e. Decrease by more than 25%

46. Is your company currently considering relocating outside of BC?
    a. Yes, strongly considering it
    b. Yes, considering it somewhat
    c. No, currently not considering it

47. If <u>yes (yes, strongly considering it, yes considering it)</u>, what are the reasons for this? (Select all that apply.)

    a. Lack of access to affordable capital
    b. Lack of availability/affordability of effective training
    c. Lack of skilled people to hire
    d. Lack of a “scene”/collaboration opportunities
    e. Competing with tax credits or grants in other jurisdictions
    f. Lack of access to foreign markets
    g. Lack of business opportunities
    h. Lack of tour/showcase support
    i. Lack of venues and/or promoters
    j. Restrictive bylaws or regulations that impact growth
    k. Lack of creative spaces and incubators
    l. Changing business and/or revenue models
    m. Other. Please specify:____

48. If <u>yes (yes, strongly considering it, yes considering it)</u>, where will your company relocate?
    a. Ontario
    b. Québec
    c. Another province in Canada other than Ontario or Québec

d. United States
e. I don't know
f. Other. Please specify:____

Workforce profile

49. What music-related positions does your business typically employ (include full-time, part-time, temporary, contract and freelance employment)? (Select all that apply)
    a. Conductor, composer, lyricist and/or arranger
    b. Musician and/or singer
    c. Producer (including record producer, stage director/producer in the performing arts, multimedia audio producer, radio producer, music editor, music video producer, music related TV, film and advertising producer, video game audio production)
    d. Audio recording technician for music (including sound engineer, recording studio operator or music/sound mixer)
    e. Music technology specialist (including programmer, developer, coder, or software engineer)
    f. Entertainment lawyer or legal assistant
    g. Music supervisor
    h. Music journalist
    i. Music manager, agent, or promoter
    j. Music festival producer/organizer responsible for booking acts
    k. Live music venue manager/organizer responsible for booking acts
    l. Marketing and promotions (including content marketing / social media marketing)
    m. Music-related publicist
    n. Music publisher
    o. Record label executive/representative
    p. Music broadcaster (radio, other media)
    q. Performance rights expert
    r. Music association employee/representative
    s. Music educator/teacher
    t. Other. Please specify: ______________________________________

50. What percentage of your overall workforce perform a music-related function? (Give your best guess estimate.) (*sliding scale option*)

51. How do you anticipate your employment of people performing a music-related function will change over the next 12 months?

    a. Total employment of people performing a music-related function will increase
    b. Total employment of people performing a music-related function will decrease
    c. There will be no change

d. I’m not sure.

52. If (a) (total employment of people performing a music-related function will increase), what new music-related positions will you hire or contract for in the next 12 months? (Select all that apply)
    a. Conductor, composer, lyricist and/or arranger
    b. Musician and/or singer
    c. Producer (including record producer, stage director/producer in the performing arts, multimedia audio producer, radio producer, music editor, music video producer, music related TV, film and advertising producer, video game audio production)
    d. Audio recording technician for music (including sound engineer, recording studio operator or music/sound mixer)
    e. Music technology specialist (including programmer, developer, coder, or software engineer)
    f. Entertainment lawyer or legal assistant
    g. Marketing and promotions (including content marketing / social media marketing)
    h. Music supervisor
    i. Music journalist
    j. Music manager, agent, or promoter
    k. Music festival producer/organizer responsible for booking acts
    l. Live music venue manager/organizer responsible for booking acts
    m. Music-related publicist
    n. Music publisher
    o. Record label executive/representative
    p. Music broadcaster (radio, other media)
    q. Performance rights expert
    r. Music association employee/representative
    s. Music educator/teacher
    t. Other. Please specify: ______________________________________
    u. I don’t know

53. If (a) (total employment of people performing a music-related function will increase), how many of these positions will be based in BC?

    a. More than half
    b. Less than half
    c. I don’t know

Attraction and Retention

54. Does your company face any challenges recruiting and retaining qualified people to fill music-related positions?
    a. Yes
    b. No
    c. I don’t know

55. What best the impact of the business challenges?

    a. We have to turn down work.
    b. We are not able to expand.
    c. We are not able to start or complete work on time.
    d. We spend a lot of time and energy on finding the right people.
    e. Our current staff/people who work for us need to work longer hours.
    f. Our client base is declining.
    g. The quality of our work has declined.
    h. The cost of business has increased due to higher wages/benefits
    i. Other. Please specify:____
    j. I don't know.

56. How would you compare your capacity to recruit/find qualified people to fill music-related positions today compared to previous years?
    a. It is significantly harder to recruit/find qualified people today compared to previous years.
    b. It is somewhat harder to find qualified people today compared to previous years.
    c. It is the same.
    d. It is easier to find qualified people today compared to previous years.
    e. I don't know/does not apply

57. How would you describe turnover rates (i.e. people leaving your company/deciding to no longer work with you) for music-related positions this year compared to previous years?

58. If (a) or (b), why do you think turnover is higher this year compared to previous years?

Please specify:____

59. When there are music-related vacancies, which positions are hardest to fill? (Select all that apply.)
    a. Conductor, composer, lyricist and/or arranger
    b. Musician and/or singer
    c. Producer (including record producer, stage director/producer in the performing arts, multimedia audio producer, radio producer, music editor, music video producer, music related TV, film and advertising producer, video game audio production)
    d. Audio recording technician for music (including sound engineer, recording studio operator or music/sound mixer)
    e. Music supervisor
    f. Music technology specialist (including programmer, developer, coder, or software engineer)
    g. Entertainment lawyer or legal assistant

h. Marketing and promotions (including content marketing / social media marketing)
i. Music journalist
j. Music manager, agent, or promoter
k. Music festival producer/organizer responsible for booking acts
l. Live music venue manager/organizer responsible for booking acts
m. Music-related publicist
n. Music publisher
o. Record label executive/representative
p. Music broadcaster (radio, other media)
q. Performance rights expert
r. Music association employee/representative
s. Music educator/teacher
t. Other. Please specify: ______________________________________
u. I don't know

60. Generally speaking, how do you find people to fill your music-related positions? (select top three)
    a. Word of mouth
    b. Job boards (e.g. Craigslist, Kijiji, Indeed.com, Castanet, LinkedIn, WorkBC and/or other employment-related search engines)
    c. Company website
    d. Social media platforms and forums
    e. Recruiting companies
    f. Promoters, managers, agents
    g. Job fairs
    h. Internships/work placements (i.e. person starts as an intern with your company)
    i. Other. Please specify:____________________________________

Skills and Training

61. What skills does your company require from the people who hold music-related positions within your company? (Select all that apply.)

a. Music composition and songwriting
b. Music production
c. Music publishing/licensing
d. Sound engineering
e. Music supervision
f. Artist management/representation
g. Publicity/PR
h. Artist development

i. Performance venue operation/management
j. Stage production
k. Music technology, hardware and software development
l. Marketing and promotions (including content marketing / social media marketing)
m. Legal knowledge (e.g. basic knowledge of contracts, licensing, etc)
n. Sales
o. Financial management/basic accounting/bookkeeping
p. Presentation/communication skills
q. Organizing skills/scheduling
r. Conflict resolution skills
s. Relationship building/networking/collaboration
a. Other. Please specify:___________________________

62. What are the most common skills gaps that you observe among the people who perform music-related functions in your company and/or among the people who apply/look for music-related positions with your company, if any? (Select all that apply.)

  a. Music composition and songwriting
  b. Music production
  c. Music publishing/licensing
  d. Sound engineering
  e. Music supervision
  f. Artist management/representation
  g. Publicity/PR
  h. Artist development
  i. Performance venue operation/management
  j. Stage production
  k. Music technology, hardware and software development
  l. Marketing and promotions (including content marketing / social media marketing)
  m. Legal knowledge (e.g. basic knowledge of contracts, licensing, etc)
  n. Sales
  o. Financial management/basic accounting/bookkeeping
  p. Presentation/communication skills
  q. Organizing skills/scheduling
  r. Relationship building/networking/collaboration
  s. Other. Please specify:____
  t. I haven’t noticed any skills gaps

63. Has your business ever provided internship or work placement opportunities to individuals who are looking to pursue a career in the music industry?
  a. Yes
  b. No
  c. I don’t know

64. (If yes) In your opinion, how useful have internships and work placements been for your company in terms of relieving staffing pressures and/or helping you find talented people to work with the company?"
    a. Very useful
    b. Somewhat useful
    c. Not useful
    d. I don't know

65. If no, why have you not provided internships or work placements?
    a. We've never really thought about it
    b. Internships/work placements are not useful for us
    c. We don't have time to train/supervise interns/work placements
    d. We don't have exposure to people interested in internships or work placements
    e. Other. Please specify:____

66. As a business owner/representative, what kind of professional development skills or other support programs would help you grow your business, if any? (select all that apply)
    a. advanced communication skills for managers
    b. building your music company brand
    c. effective marketing and social media communications
    d. leading high performance teams
    e. strategic decision making
    f. developing customer centric strategies
    g. performance management
    h. strategies and skills of negotiation
    i. accelerating sales team performance and building revenue
    j. Other. Please specify:_________________________
    k. None. I/we don't require professional development skills or other support programs would to help grow my/our business

67. Would you consider offering your services as a mentor to help others succeed in the music industry in BC?

a. Yes
b. No.
c. I don't know

Future of the industry

68. If there were one thing you could change about doing business in the music industry in BC, what would it be? Please specify:____

Annex 3. Music professionals focus group guide

A. **Appeal/Attraction of the Music Industry in BC**

1. What do you like about working in the music industry in BC?

2. What don't you like about working in the music industry in BC?

3. Is anyone in the room intending on leaving BC to pursue your music career elsewhere?

4. <u>If yes</u>, why?

5. <u>If yes</u>, what would need to change to keep you in BC?

B. Work patterns

6. How many people are self-employed?

7. <u>If self-employed</u>, what do you like about being self-employed? (Prompt: What are some of the benefits of being self-employed?)

8. <u>If self-employed</u>, what don't you like about being self-employed?

C. Opportunities

9. Has your music-related income increased, decreased or remained the same this year compared to previous years?

10. Would you say you are working more hours on your paid music work this year compared to previous years? Or less? Or the same number of hours?

11. If <u>higher income, more hours</u>, how do you explain this change?

12. If <u>lower income, fewer hours</u>, how would you explain this change?

13. If you have not accessed grants, why not?

D. Barriers in the industry

14. Have you experienced any barriers that have made it difficult for you to enter the music industry in BC?

15. How could the industry help you address these barriers? What could be done to address these barriers?

16. Have you ever faced discrimination based on personal characteristics like sex, age, race, ethnicity, religion, sexual orientation, physical or mental ability, etc?

17. <u>If yes</u>, how has this manifested itself?

18. <u>If yes</u>, what can the industry or others do to help end discrimination?

E. Internship and mentorship

19. Have you participated in an internship or work placement in the music industry in BC?

20. Do you think there is value in developing more structured internship and work placement programs in BC? If yes, why? If not, why not?

21. Do you currently have a mentor (someone in the industry who has guided you along your career path)?

22. Do you think there is value in developing more structured mentorship programs in BC? If yes, why? If not, why not?

F. Skills development

23. When you recognize that you need to develop your skills, what do you do? How do you access skills development tools? Which tools?

24. Have you found industry skills development initiatives useful/beneficial?

25. Is there value in the industry creating more skills development opportunities?

26. If so, what would these look like?

G. Other recommendations

Open discussion

H. Closing

Annex 4. Music businesses semi-structured interview guide

A. Profile

1. What best describes your business?
2. Not including yourself, how many people work with you (either as employees or as contractors) in an average year?
3. Where is your company located?

B. Appeal of the music industry in BC

4. What do you like about doing business in BC?
5. What don't you like about doing business in BC?
6. Is your company currently considering relocating outside of BC?
7. If yes, why?
8. If yes, do the reasons for leaving seem to be intensifying?
9. If yes, what would need to change to make you stay in BC?

C. Opportunities

10. How has your company's revenue changed in the past 5 years on average? Options include:
    a. Increase
    b. Decrease
    c. No change
    d. I don't know
11. (If there was a change- either increase or decrease in revenue): How would you best explain this change in revenue?

12. (If there was no change in revenue): Why do you feel your business revenue has not increased in the past 5 years?

13. How do you anticipate your company's revenue will grow in the next 5 years?
    a. Increase
    b. Decrease
    c. No change
    d. I don't know

14. (If a change is anticipated – either increase or decrease): Why do you think your revenue will change? Please explain.

15. If no change: Why do you think there will not be any change in revenue over the next 5 years?

D. Recruitment, retention and skills development

16. Does your company face any challenges recruiting and retaining qualified people to fill music-related positions?

17. If yes, what best describes the nature of these challenges. Options include:

    a. It is difficult to find people with the right skills and experience.
    b. We can find people with the right skills and experience but they soon leave for other opportunities.
    c. We can find people with the right skills and experience but they are often not available when we need them.
    d. Other. Please specify:___________________________________

18. Are recruitment and retention issues getting worse, better or staying the same? Please explain.

19. (If response is skills related), what skills gaps are you observing?

E. Internships and work placements

20. Has your business ever provided internship or work placement opportunities to individuals who are looking to pursue a career in the music industry?

21. If yes, do you have any advice for companies that are thinking about start an internship or work placement program?

22. If no, why not?

23. If no, would you like to provide internship or work placement opportunities?

24. If yes to above question, what kind of support would you require to start an internship or work placement program in your company?

25. Do you think there is value in developing more structured internship and work placement programs in BC?

F. Mentorship

26. Do you currently have or have you ever had a business mentor, that is someone who has provided you with advice on how to plan and grow your business in the music industry?

27. If yes, how important has this been for your success? Options include:

    a. Very important
    b. Somewhat important
    c. Not important

28. If no, why not?

29. If no, would you find it helpful to have a business mentor?

30. Have you participated in or had exposure to any industry-led business support opportunities?

31. If yes, have you found these to be valuable?

32. Do you think there is value in developing more structured business mentorship programs in BC?

33. If not, why not?

G. Skills and Professional Development

34. Have you ever accessed any training or skills development support delivered by industry organizations?

35. If yes, please explain

36. If no, why not?

37. Do you think there is value in developing more skills development and other support programs for music businesses in the province?

H. The Future of the Industry

(Will vary depending on the respondent.)

38. Would you find Business-to-Business networking and collaborating opportunities useful?

39. Do you think there are opportunities to attract more large music business headquarters to BC? Would this help you grow your business?

40. Do you think there are opportunities for BC to become a post-production hub (and increase opportunities for film and TV-related music work)?

41. Do you think there are opportunities to better “sell” BC as a place to come for music/music destination?

42. Are there opportunities to create a centralized resource (e.g. website or directory) that posts all music-related jobs available in the province?

43. Do you think there are opportunities to build connections between innovation companies and the music industry in urban centres across the province?

Annex 5. Innovation companies semi-structured interview guide

A. Profile

1) What do you think are the particularly unique or innovative aspects of your company?

2) In general, how would you describe your knowledge of the music, arts and culture scene in _____ (city/town)? This is multiple choice question. Do you …
    a. Above average - I make a conscious effort to know what's happening in the music, arts and culture scene.
    b. Average - I somewhat follow what's happening in the music, arts and culture scene.
    c. Below average - I don't really follow what's happening in the music, arts and culture scene.
    d. I'm not sure.

3) Did the music, arts, and culture scene in _________ play a role in helping you to make the strategic decision to position your company in___________?

4) If yes, please explain.

5) If no, what are the main reasons for positioning an innovative company like_______ in_________?

6) As we mentioned earlier, research suggests a connection between a city's cultural scene and its capacity to attract and retain creative talent. What are you views on these findings, based on your experience. This is multiple choice question. Do you...
    a. Strongly agree
    b. Agree
    c. Neither agree nor disagree
    d. Disagree
    e. Strongly disagree

B. Recruitment

7) How many staff do you employ?

8) What percentage of your staff must push the envelope, invent and innovative as a core part of their job?

9) When recruiting staff that you would describe as creative or innovative (people who you expect to invent and innovate) do you or your HR department talk to potential candidates about the vibrancy of the music, arts, and culture scene in____________ to attract potential innovation talent to join your company, and enjoy the lifestyle and entertainment options that_______ (city/town) offers?

10) If <u>yes</u>, how relevant/important a role has "selling" the music, arts, and culture scene in _____________ played in helping you *[or innovative companies in your city/town]* to recruit your creative talent? Would you say it's...

   a. Very important
   b. Somewhat important
   c. Not important
   d. I don't know

11) If <u>no</u>, based on what the research says about the links between creative scenes and creative talent, do you think you would be more willing to "sell" the city's vibrant and creative music, arts and culture scene when trying to recruit and retain your creative talent? Please explain.

12) What kinds of quality of life attributes in _____________ do you sell to prospective employees?

C. Retention

13) Have you had any employees leave your company and move to another city at least in part so they could access a more vibrant cultural scene?

D. Music in the workplace

14) How do your employees interact with music in their work environment?

15) As an employer, have you ever organized a music-related social event for your staff?

E. Moving forward/closing

16) Moving forward, is there an opportunity for the music industry in _____________ possibly through the Chamber of Commerce or a Business Improvement Association - to play a role in helping you to attract creative talent?

17) If yes, how could they help?

18) We will be including an acknowledgement or special thanks section in our report which will include a list of all the people or organizations/businesses interviewed in the study. Could we include the name of your company?

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Annex 7. Limitations and work-arounds

Limitation:

NOC and NAICS codes are not perfect matches for the occupations and businesses present in the music industry.

Work around:

To address this challenge, a mapping of occupations and businesses to NOCs and NAICS was conducted. Occupations and businesses where NOCs and NAICS were too broad and where survey results did not yield sufficient insights to provide further scoping were dropped from the analysis that draws on secondary data. These occupations and businesses are, however, included in the analysis that draws on primary data.

Mapping occupations and businesses against in-scope NOC and NAICS codes

Primary creators

Occupation	Corresponding NOC
Conductor, composer, lyricist and/or arranger	5132 (Conductors, composers and arrangers)
Musician and/or singer	5133 (Musicians and singers)

Secondary creators

Occupation	Corresponding NOC
Producers	5131 (Producers, directors, choreographers and related occupations)
Audio recording technicians	5225 (Audio and video recording technicians)
Music supervisors	5131 (Producers, directors, choreographers and related occupations)
Music journalists	*NOC (5123) too broad and number of survey responses insufficient to enable analysis*

Representatives

Occupation	Corresponding NOC
Live music venue managers/organizers	0512 (Managers - publishing, motion pictures, broadcasting and performing arts)
Music festival producers/organizers	0512 (Managers - publishing, motion pictures, broadcasting and performing arts)

Record label executive/representative	0512 (Managers - publishing, motion pictures, broadcasting and performing arts)
Music managers, agents, promoters	1123 (Professional occupations in advertising, marketing and public relations)
Music-related publicists	1123 (Professional occupations in advertising, marketing and public relations)
Music-related marketing and promotions experts (including content marketing/social media marketing)	1123 (Professional occupations in advertising, marketing and public relations)
Performance rights experts	*No direct NOC and number of survey responses insufficient to enable analysis*
Music association employees/representatives	*No direct NOC and number of survey responses insufficient to enable analysis*

Business relying on music professionals	Corresponding NAICS code
TV, film and advertising production company	5121 (Motion picture and video industries)
Video game production company	
Sound recording studio	5122 (Sound recording industries)
Record label	
Music technology company	
Solo artist or band	7111 (Performing arts companies)
	7115 (Independent artists, writers and performers)
Live music venue and/or festival	7111 (Performing arts companies)
	7113 (Promoters (presenters) of performing arts, sports and similar events)
	7132 (Gambling industries)
	7211 (Traveller accommodation)
	7224 (Drinking places (alcoholic beverages))
	7225 (Full-service restaurants and limited service eating places)
Music marketing/promotion company (including social media)	7113 (Promoters (presenters) of performing arts, sports and similar events)
Music publicist company	
Booking agency	
Music/artist management company	

Music publishing company	*NAIC (5223) too broad and number of survey responses insufficient to enable analysis*
Performance rights organization	*NAIC (5223) too broad and number of survey responses insufficient to enable analysis*
Music association	*NAIC (8139) too broad and number of survey responses insufficient to enable analysis*

Limitation:

A number of occupations in the music industry (e.g. music editors) are subsumed under NOCs (e.g. producers) that cut across multiple industries. This makes it difficult to accurately capture information about these occupations as they pertain to the music industry specifically. In addition, no single NAICS code captures the entire music industry and no single NOC code includes only in-scope music professionals. Even when cross-tabulated at their most detailed level, some NOC and NAICS codes may include employees from other industries. This means that any data organized exclusively around NAICS codes will not provide a completely accurate picture of the industry. Furthermore, public data availability is variable depending on the specific characteristic of the industry or occupation group that is being examined.

Work around:

To address these challenges, estimates were built based on the cross-section of NOCs and NAICS that aligns as closely as possible to the industry, given the limitations noted earlier on the public availability of some data. For example, industry growth was estimated using 4-digit NOC by 2-digit NAICS data from the 2011 and 2016 censuses. 2016 data on employment, Indigenous status and age is much better thanks to a custom data request providing 4-digit NAIC by 4-digit NOC level for 4 of the 6 NOC codes[60] (5132 Conductors, composers and arrangers, 5133 Musicians and singers, 5225 Audio and video recording technicians, and 1123 Professional occupations in advertising, marketing and public relations). For the remaining NOCs (5131 Producers, directors, choreographers and related occupations and 0512 Managers - publishing, motion pictures, broadcasting and performing arts), a combination of Census 2016 data and survey data was used to construct estimates. The procedure for constructing employment estimates for people whose primary source of income is music-related is described below.

Determining employment of those whose primary source of income is from their music-related work

- Survey responses were filtered to include only people whose primary source of income is in the music industry
- After filtering, survey responses were split into two groups: occupations for which there is available 4-digit NOC by 4-digit NAICS Census data and occupations for which this data is not available.

[60] This is the finest level of detail at which government-based data sources are available, either publicly or via special request. Unfortunately, even this level of detail does not completely isolate workers in the music industry. Take for example, NAICS 5121 Motion picture and video industries and NOC 5225 Audio and video recording technicians. Even when cross-tabulating these two codes, there is no way to isolate the video recording technicians working in motion picture and video from the audio recording technicians working in the same industry. As a result, employment numbers may be slightly overestimated.

- Occupations for which 4-digit NOC by 4-digit NAICS Census data is available account for 77% of survey responses[61] and, according to Census 2016 data, employ 5070 people. Of the remaining 23%, 13% identified as NOC 0512 while 10% identified as NOC 5131.
- Using these numbers, employment numbers could be calculated for the industry as a whole as well as for the two occupations without Census data. The estimates are as follows:
    - Total employment: 6626
    - NOC 0512 Managers - publishing, motion pictures, broadcasting and performing arts: 524
    - NOC 5131 Producers, directors, choreographers and related occupations: 758

People working in the industry whose primary source of income is not derived from their music-related work

- Survey respondents were grouped by occupation and whether or not their music-related work was their primary source of income.
- For each occupation, the ratio between the number of respondents who earn most of their income through music and the number of respondents who earn most of their income through other means was calculated.
- This ratio was used in combination with estimates of total industry employment (as described above) to calculate the industry-wide number of people working in each occupation whose primary income is not music-related.

It is important to note that the above methodologies depend on the assumption that distributions of survey responses across groups are equivalent to the distribution of workers across the same groups in the BC music industry as a whole. In this regard, extensive effort was made to reach out to in-scope music professionals and music businesses in BC, including by leveraging over 30 industry networks/forums and through individual outreach. (See Annexes 1 and 2.)

[61] Calculations were made based only on responses from survey participants who identified paid music work as their primary occupation.