



SOUND
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West
Anthem.

WEST ANTHEM

MUSIC ECOSYSTEM STUDY

Executive Summary Report | October 2020

FOREWORD

If ever there was a time to harness the creative capital of the music industry in our province, it would be now.

Alberta's music legacy is impressive. Decade after decade, Alberta has contributed not only talent to the national and international stage, but it has also developed an ecosystem of venues, festivals, studios, labels and professionals that are recognized for their quality and leadership across Canada and around the world. Tommy Banks, k.d. lang, Ian Tyson, Jann Arden, Paul Brandt, Feist, Tegan & Sara, and Holger Petersen are just a few examples of recognized national and international talent who have come from Alberta. Yet, despite this talent and recognition, our music industry infrastructure in the province is relatively underdeveloped and has yet to be viewed as an investment priority within the cultural industry sector. As a result, our artists, technicians, and related professionals often need to leave our province in order to make a living, despite the growing demand for music and its associated industries.

Recognizing the untapped cultural and economic benefits of the music industry in our province, West Anthem evolved out of the Alberta Music Cities Initiative and the report, Fertile Ground, which was commissioned, funded, and published by the National Music Centre and the Scotlyn Foundation in 2014 and authored by Music Canada. The purpose of the report was to instigate a conversation about fostering the development of music cities in Alberta and to highlight how music could be a catalyst for economic growth in Calgary, Edmonton and, ultimately, across the province. From this report came a number of recommendations to help further the case for music cities in our province; one of the recommendations being the development of this study.

When West Anthem began laying the foundation for a music ecosystem study, we never could have predicted what our world would look like today. COVID-19 sent shock-waves through Alberta's music ecosystem. The cancellation of music festivals, temporary and permanent closures of music venues, and the loss of many musicians' main sources of income, are just a few examples of the many dire effects of the pandemic on our industry. As we adjust to our ever-changing new realities due to the COVID-19 pandemic, the importance music plays in uniting communities, contributing to mental wellness, and providing nourishment for creativity cannot be denied.

To quote Maya Angelou, "you can't really know where you are going until you know where you have been." This study provides a snapshot of the Edmonton and Calgary music industry pre-pandemic and provides insight into the immense opportunity music provides for the long-term resiliency and vibrancy of our province. As we press on during and post-pandemic, it is our hope that this document will be a road map for where our province is headed as we build a more connected, diverse, resilient and prosperous Alberta than ever before. On behalf of the West Anthem steering committee and our stakeholders, we are very excited to be releasing the following music ecosystem study for the advancement of our industry and our province. This can be achieved by leveraging smart policies or strategies, similar to those outlined in the report, to create music-friendly cities.

West Anthem would like to thank all of our community partners, sponsors and supporters for making this work possible.

**Sincerely,
West Anthem**

Front Cover Photos: Explore Edmonton,
Unfolding Creative & Adobe Stock/JES Studio
Back Cover Photo: Explore Edmonton



ABOUT THE PROJECT

The music sector in Calgary and Edmonton is extensive, making significant contributions to the social and economic fabric of the two cities, their metro regions and the province as a whole.

The dedication to music is evident throughout the two regions, with their extensive funding and advocacy opportunities for music creators, quality educational offerings and music facilities via universities, such as the music program at MacEwan University, the National Music Centre and the Winspear Centre. In these areas, there are over 1,500 music assets, and a rich variety of music festivals catering to all genres. Through the diversity, support systems and assets that already thrive in Calgary and Edmonton, this report

aims to harness the power of the music community, activating music-friendly policies and fully integrating the music ecosystem into the planning, development, and progression of Alberta.

Once Calgary and Edmonton music communities are activated, they will contribute to Alberta's vibrancy in a variety of ways, including creating jobs, developing skills and fostering a wider pool of lucrative intellectual property beyond the two cities' metro regions. However, supporting the music sector requires a

comprehensive understanding of its value in the province, alongside persistent monitoring. Drawing from extensive research and data analysis, stakeholder feedback and global best practices, the **West Anthem Music Ecosystem Study** provides a strategic plan to engage provincial and municipal policymakers, industry stakeholders, and audiences in both Calgary and Edmonton. The objective is to grow and support the region to position the province as a music hub.



Photo: Explore Edmonton

METHODOLOGY

STEP 1: MUSIC VISION AND REGULATORY ASSESSMENT

A long-term vision for Alberta's music ecosystem was established. This was followed by desk research, literature reviews and an overview of all relevant policies and strategies. We also compared the findings to best practices from all over the world from which Edmonton and Calgary can learn.

STEP 2: STAKEHOLDER AND COMMUNITY ENGAGEMENT

Over 3,040 respondents participated in the two online surveys between November 2019 and January 2020. Of the participants, 340 respondents were musicians, 2,564 were music fans, and 200 were music industry professionals. We also conducted 12 round-tables and 15 on-line and in-person interviews, with over 120 music industry stakeholders engaged throughout the process.

STEP 3: QUANTITATIVE RESEARCH

A music asset map was created through our unique place-scraping tool and was supported through local consultants. We combined our comprehensive mapping findings with data from additional sources, such as the Canada Culture Satellite Account, to deliver an economic impact assessment of Alberta's music ecosystem.

STEP 4: ANALYSIS OF KEY FINDINGS AND STRATEGIC OPPORTUNITIES

We provided an extensive analysis of our economic findings, alongside an overview of the key strengths and challenges in the province. This was supported by a benchmarking analysis in nine strategic opportunity areas. Each area features key actions and case studies to refer to, going forward.



KEY FINDINGS

“I want everyone to know that music is an important industry in Alberta and that the government needs to take notice of this. Music truly brings people of all types together.”

Survey Respondent

Photo: Explore Edmonton.

ECONOMIC IMPACT AND ASSET MAPPING SUMMARY

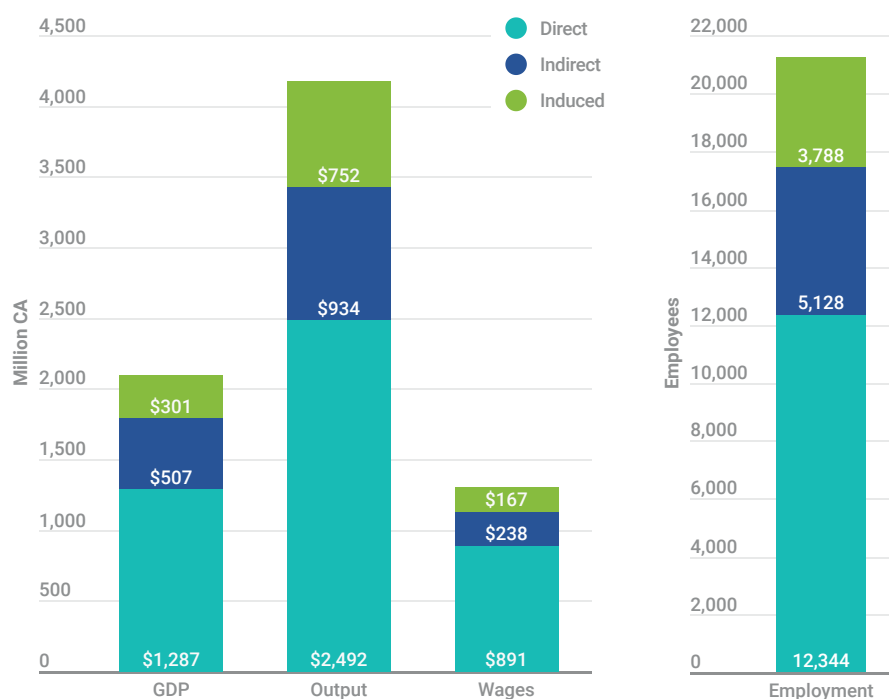
MUSIC ECOSYSTEM 2017

In total, the two cities' music ecosystems generated a total output of \$2.9 billion – \$1.3 billion and \$1.6 billion in Edmonton and Calgary, respectively. The province also generated a Gross Domestic Product (GDP) of \$2.1 billion, \$687.53 million in Edmonton and \$820.76 million in Calgary in 2017.

The total number of jobs generated and supported by the music sector in the province reached 21,261, of which 7,107 belong to Edmonton and 8,435 to Calgary.



FIGURE 1. ALBERTA MUSIC ECOSYSTEM ECONOMIC IMPACT 2017



Source: Statistics Canada 2017, Sound Diplomacy Research

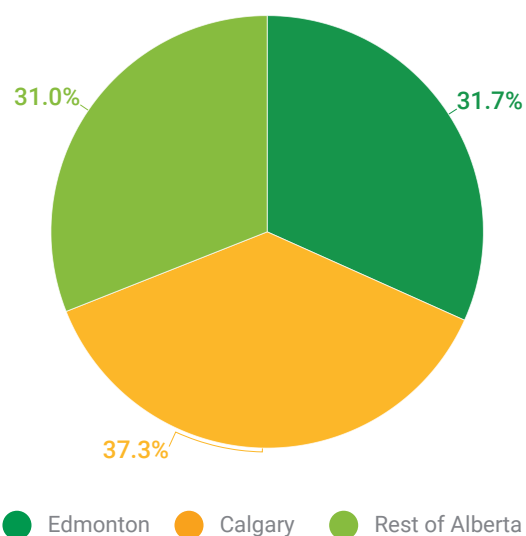
The music workers in Alberta received a total compensation of \$1.29 billion in 2017, \$416.07 million in Edmonton and \$495.5 in Calgary.

MUSIC ECOSYSTEM EMPLOYMENT & OUTPUT

In general, the music ecosystem has been more dynamic than the total of the culture industries in the province.

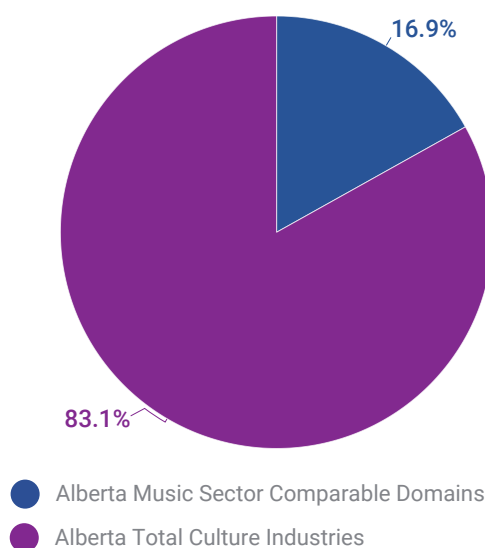


FIGURE 2. ALBERTA MUSIC ECOSYSTEM DIRECT GDP BY REGION, 2017



Source: Statistics Canada 2017, Sound Diplomacy Research

FIGURE 3. ALBERTA MUSIC ECOSYSTEM GDP RATIO, MUSIC SECTOR AND REST OF CULTURAL INDUSTRIES, 2017

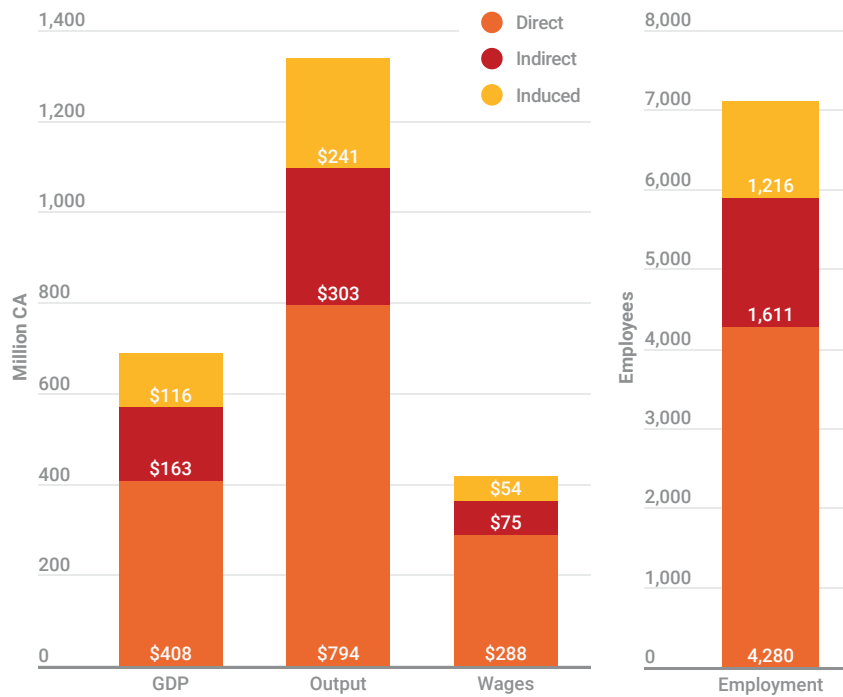


Source: Statistics Canada 2017, Sound Diplomacy Research



According to the results and data obtained from the Culture Satellite Account, in the period between 2010 and 2017, we observe that **Alberta's music ecosystem grew by 25%** while the culture industries showed a more modest growth of 17%. In 2017, the **music sector contributed 16.6%** of the GDP generated by the cultural industries in Alberta.

FIGURE 4. EDMONTON'S MUSIC ECOSYSTEM TOTAL ECONOMIC IMPACT



Source: Statistics Canada 2017, Sound Diplomacy Research

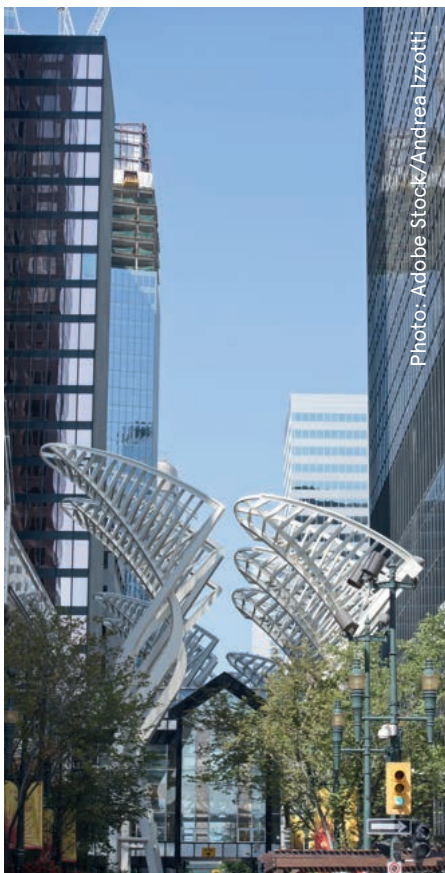
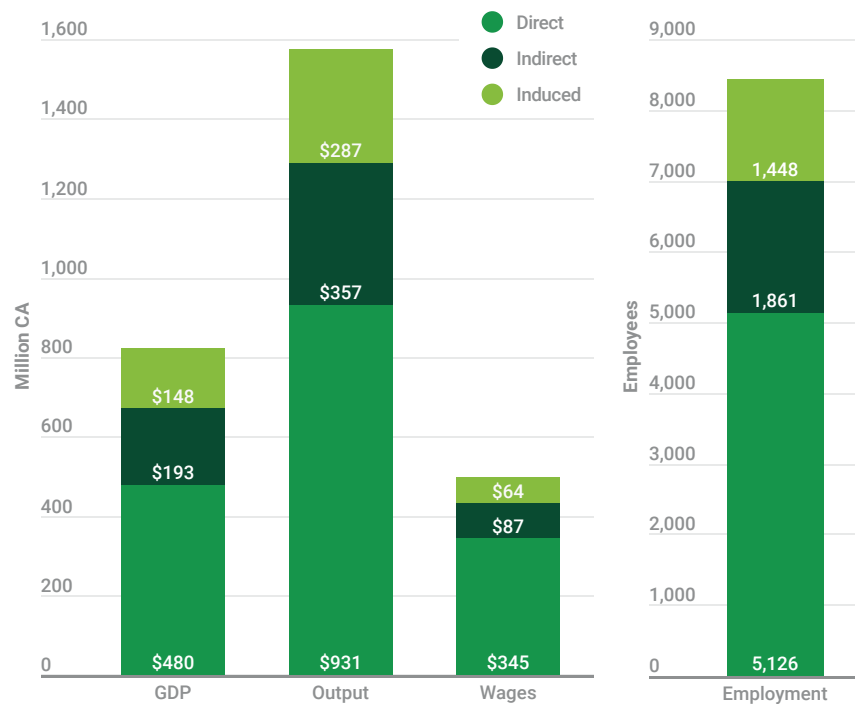


FIGURE 5. CALGARY'S MUSIC ECOSYSTEM TOTAL ECONOMIC IMPACT

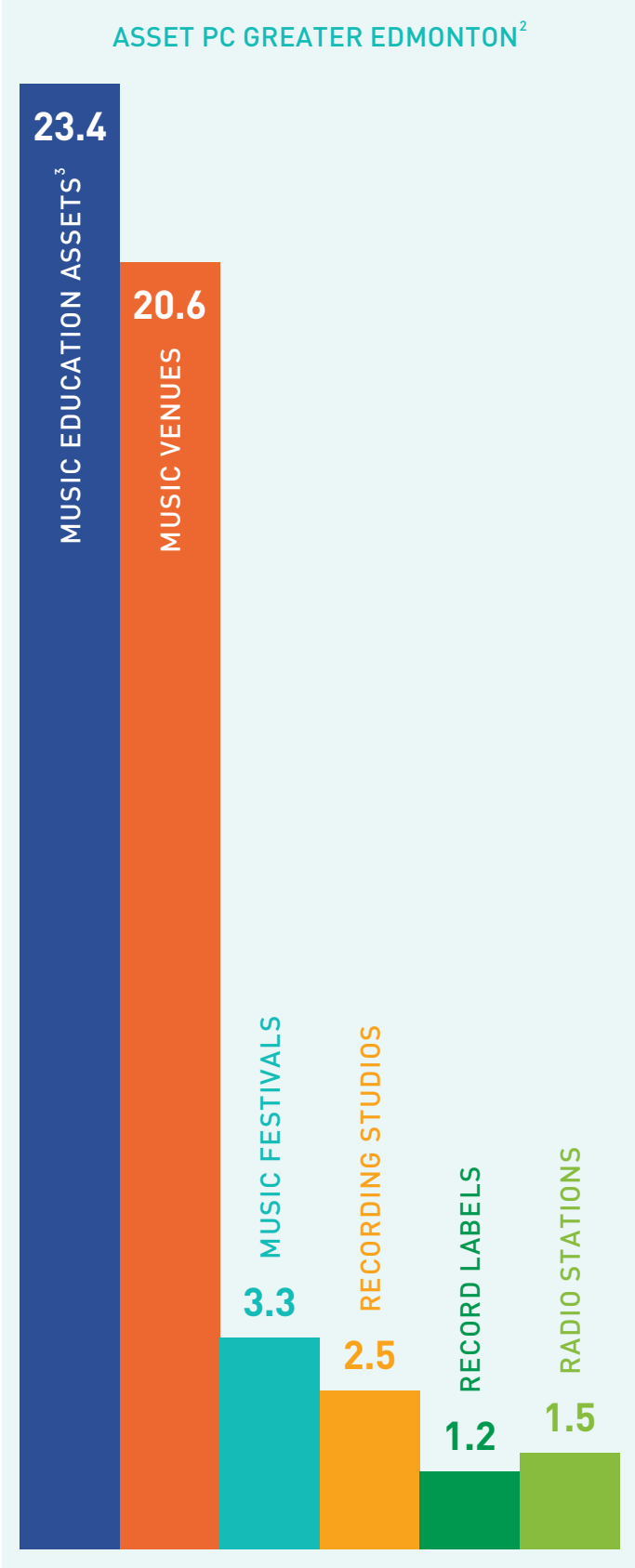
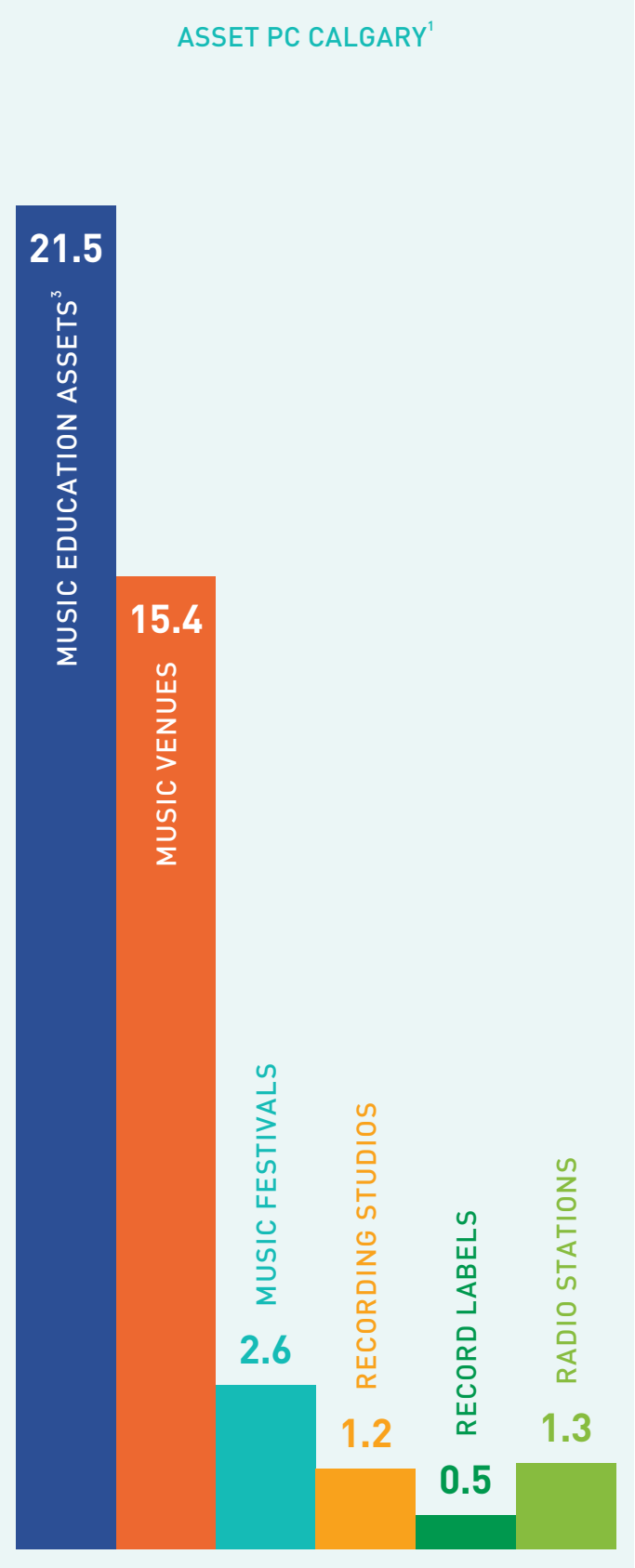


Source: Statistics Canada 2017, Sound Diplomacy Research

MAPPING

Number of assets per capita in Greater Calgary and Edmonton (100,000 pc).

1 Population: 1,392,609
2 Population: 1,321,426
3 The sum of all music teachers, schools, conservatory, college and university programs with music, including music business programs, choirs and orchestras.



WEST ANTHEM AT A GLANCE

STRENGTHS

- **Newly developed Rogers Place arena** in Edmonton, alongside plans to develop a **new Calgary Event Centre**
- **Ownership of the National Music Centre**
- **Unique educational opportunities** found in MacEwan University, Mount Royal Conservatory and the Banff Centre for Arts and Creativity
- **Rich festival offerings** throughout the province (ie; “The Greatest Outdoor Show On Earth”, the Calgary Stampede)
- **Exemplary health and safety practices** for live music and entertainment venues
- **Promotion of artist development** led by the publishing of Calgary’s Busking Guidelines
- **CKUA Radio Network** – a unique resource for promoting Alberta artists with an established presence in Alberta.

OPPORTUNITIES

- Work to develop a stronger music identity to **diversify opportunities** and **encompass First Nations, Metis and Inuit heritage**
- **Make use of dormant spaces** by redeveloping them to create music hubs
- **A rich and diverse music heritage** founded upon the musical roots of the province
- **Structure music assets as a driver for tourism** in the province (ex; Calgary Stampede and Edmonton’s ICE District)
- **Showcasing opportunities for local artists** on a regional and international level and **fostering the growth of homegrown talent**
- Inspect and **enhance music access** for all music actors, **including culturally diverse artists, women, people of colour and LGBTQ2+ Communities.**

WEAKNESSES

- **No policies protecting music venues** (e.g. Agent of Change) currently in place
- **No government level music commissions or representations to accommodate partnerships** amongst policy-creators and music communities
- **Missing all-ages ordinances** used to establish a strong music economy and inclusive music communities
- **No fair pay schemes** for performing artists
- **No current incentive programs** that support music-centred activity
- **Lacking night time transportation**, which limits access to late-night events, and transportation to and from jobs that support night-time activity.

THREATS

- **Geographical dispersion of the major cities** in Alberta can **negatively impact music tourism**
- **Talent drain to other well-supported music ecosystems** in other cities or the surrounding provinces and states
- An overzealous **focus on traditional music genres** in the province (Folk) which can lead to a **neglect of other rising genres that appeal to youth** (EDM and Hip-Hop)
- **Undetermined increases in national regulations for home-buyers**, leading to a decrease in the number of young-adults purchasing homes in the core of major cities
- In Canada, **Calgary**, more than Edmonton, is **not commonly perceived as a creative city.**

REGULATORY ASSESSMENT FINDINGS SNAPSHOT



SURVEY ANALYSIS

KEY FINDINGS

Sound Diplomacy developed a comprehensive 11-week survey (from November 21st, 2019 to February 15th, 2020) to gather information from music industry professionals, musicians and music fans based in greater Edmonton and Calgary. An additional audience-only survey was then made available between January 16 and February 15th, 2020. The two surveys were analyzed separately, reaching a total of 2,564 music fans – 1,410 music fans from Edmonton and 1,078 from Calgary (including Greater metro region).

19% of Edmonton organizations and professionals, and 14% of those based in Calgary, acknowledged that they do not have any music industry training.

42% of Calgary-based artists and 48% of Edmonton-based artists said they would like to improve their "music industry skills".

When asked about the most impactful ways for local governments to support music, 64% of Edmonton and 57% of Calgary-based organizations said they would welcome operational grants and tax incentivization programs, followed by funding and sponsorship support (33% and 35%, respectively) and the provision of affordable performance, work and rehearsal spaces (35% and 34%, respectively).

2 out of 3 artists lacked a support team (record label, artist manager, publicist, etc).

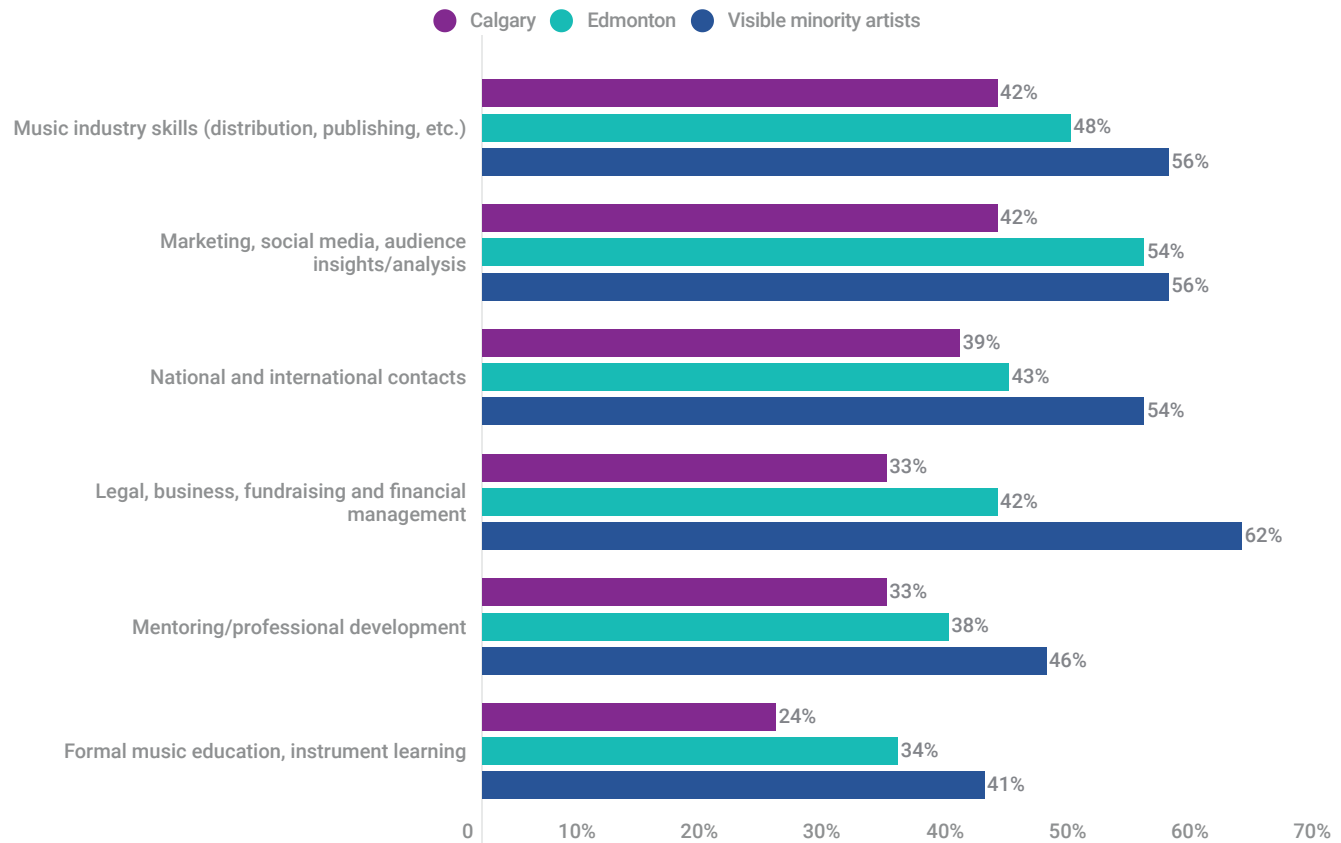
13% of artists were dedicated exclusively to their music career with no other income.

Only 6% of Edmonton and 11% of Calgary music organizations and professionals who participated availed themselves of tax rebates or incentivization.

Roughly half of the festivals said they are not currently but would like to collaborate with tourism authorities.



FIGURE 6. KNOWLEDGE GAPS IDENTIFIED BY ARTISTS



STRATEGIC OPPORTUNITIES



Photo: Adobe Stock/Edgar Bullon



STRATEGIC OPPORTUNITIES

This section includes strategic actions assessed across nine action areas. Within these nine areas, we have outlined **31 opportunities** pertaining to Calgary, Edmonton, and Alberta.

GOVERNANCE AND LEADERSHIP

P OPPORTUNITY AREA #1

Position West Anthem as The Music Advisory Council Representing Alberta's Music Sector (12-24 months)

P OPPORTUNITY AREA #2

Create Routine All-Ages Events and Venues (12-24 months)

C OPPORTUNITY AREA #3

Implement Late-Night Transit Programs (24-48 months)

E OPPORTUNITY AREA #4

Develop Edmonton Busking Guidelines (1-12 months)

DIVERSITY AND EQUITY

P OPPORTUNITY AREA #5

Work with LGBTQ2+ Communities to Increase the Overall Opportunities through Music Diversity Groups, Events, and Mentorship Programs (12-24 months)

P OPPORTUNITY AREA #6

Partner with Marginalized Groups to Identify Their Specific Music Needs, Including Women and Diverse Cultural Groups, and Work Together to Develop Routine Career Support Programs (12-16 months)

AUDIENCE DEVELOPMENT

E OPPORTUNITY AREA #7

Strategically Coordinate Festival Events, & Dates, Allowing for More Engagement (12-16 months)

E OPPORTUNITY AREA #8

Encourage Engagement in Musical Events through Transportation Reward Programs (1-12 months)

MUSIC EDUCATION

P OPPORTUNITY AREA #9

Work with Indigenous Communities to Integrate Indigenous Music Education Programs into Provincial Curriculum, in Alignment with the Teacher Quality Standard #5 (Applying Foundational Knowledge About First Nations, Métis, and Inuit) (12-24 months)

C OPPORTUNITY AREA #10

Establish a Music Therapy Education Program that Provides Certifications or Credentials (12-24 months)

E OPPORTUNITY AREA #11

Initiate a Program Focused on Musical Scoring (Film, Television, and Gaming) (12-24 months)

ARTIST & MUSIC INDUSTRY DEVELOPMENT

P OPPORTUNITY AREA #12

Provide Musicians with Education Opportunities Using Modern Approaches (12-24 months)

P OPPORTUNITY AREA #13

Organize and Implement a Long-Term Artist Program (12 months) that Provides Developing Artists with Professional Experiences, Educating Musicians on Career Development and Sustainability Through a Practical Process (12-24 months)

P OPPORTUNITY AREA #14

Offer a Music Entrepreneur Program to Support Developing Artists, Further Harnessing and Supporting the Already Established Entrepreneurial Community within Each City Across Alberta (12-24 months)

SPACES & PLACES

P OPPORTUNITY AREA #15

Implement and Distribute a 'Fair Pay' Program to Properly Compensate Artists *(1-12 months)*

P OPPORTUNITY AREA #16

Facilitate Permitting and Temporary Activation of Empty Buildings and Spaces to Create Cultural Offerings for Youth and Artists *(1-12 months)*

P OPPORTUNITY AREA #17

Facilitate Long-Term Creation of Music Spaces (Education, Rehearsal, Recording and Performing) through Incentives to Developers of New Projects and to Redevelopers of Existing Buildings *(24-28 months)*

C OPPORTUNITY AREA #18

Utilize Multi-Purpose Facilities and Dormant Spaces Outside of the Downtown Core, Whether by Establishing Music Venues or Temporarily Activating Spaces for Culture-focused Events *(1-12 months)*

E OPPORTUNITY AREA #19

Maximize Music Spaces Throughout the City by Hosting Daytime Music Events and Shows, with a Particular Focus on The ICE District *(1-12 months)*

TOURISM & REPUTATION AS A MUSIC PLACE

P OPPORTUNITY AREA #20

Create a "This Is Alberta" Playlist on Streaming Channels, Promoted through Tourism Departments *(1-12 months)*

P OPPORTUNITY AREA #21

Offset the Costs of Booking International Artists by Drawing in Musicians to Record in Alberta through a Reimbursement Program *(24-48 months)*

P OPPORTUNITY AREA #22

Fully Integrate Music Tourism into Tourism Strategies and Offerings, Making It a Focal Point of Attraction Through a Strategy or Action Plan *(12-24 months)*

C OPPORTUNITY AREA #23

Engage in Global Music City Conferences and Events *(1-12 months)*

E OPPORTUNITY AREA #24

Engage the Music Industry in Edmonton's Tourism Offerings and Expand Genre Promotion *(12-16 months)*

NIGHT TIME ECONOMY

P OPPORTUNITY AREA #25

Organize the Creation of a Night-time Operations Office and Advisory Board *(24-48 months)*

C OPPORTUNITY AREA #26

Develop an After-Hours Venue Permit with Regulated Late-Night Venues *(24-48 months)*

E OPPORTUNITY AREA #27

Organize and Promote Evening and Late-Night Transit Safety Strategies to Work in Conjunction with The Late-Night Transit Service *(12-16 months)*

MUSIC EXPORT

P OPPORTUNITY AREA #28

Establish a Stronger Local Music Export Offering, Including Increased Export-Ready Programming and Enhanced Promotions *(24-48 months)*

C OPPORTUNITY AREA #29

Host Music Export Seminars and Fairs *(12-16 months)*

C OPPORTUNITY AREA #30

Further Expand and Build Upon The Roots of the SoundOff Summit *(12-16 months)*

E OPPORTUNITY AREA #31

Work with Indigenous Artists to Create a Music Export Program in the Region *(12-16 months)*

CONCLUSION

Music has unlimited potential. It has the power to alter our lives, improve our mental health, develop our communities, sustain a city, and more. The recommendations offered in this study aim to bring more value to music in Alberta, while utilizing its potential to its maximum capacity.

Some of these recommendations are large and bold, while some of them are simple, yet small adjustments that are frequently overlooked. All, however, can be used to enhance everything music-related in Alberta. Once activated, Alberta will establish Calgary and Edmonton as high-functioning music cities. This will only be possible by tapping into the many passionate artists, organizations, and advocates that are fully invested in the music and arts sector across the province. Music Mile and The Calgary Municipal Land Corporation, for example, have positioned music entertainment as a primary function in the eastern regions of downtown Calgary. Similar examples can be found in Edmonton with One Properties Group, responsible for developing the state-of-the-art Rogers Arena.

Without question, music is prevalent within Alberta's major cities. A clear commitment to harnessing music can be found in the plethora of educational offerings, the establishment of Calgary's own National Music Centre, and the development of Edmonton's ICE District, amongst many others. These assets separate Calgary and Edmonton from many other music cities across Canada. However, in order to optimize these unique assets and match the

ambitions of this project, Alberta must look to build partnerships and maintain a clear channel for communication and collaboration. Each recommendation or strategic opportunity is derived from the input of the broader music ecosystem, and although these appear as individual actions, they all work in conjunction with one another. It is important to recognize the need to develop and grow alongside these recommendations, drawing upon the voices and needs of those who fuel our music industry – artists and music professionals. Commitment and a willingness to adapt are synonymous with positive music city outcomes. The current support for music is unquestionably admirable within Alberta, though, there are still many unmet needs. Government participation, engagement with music communities, and equitable opportunities are perhaps the most critical areas that require immediate action. These actions may seem large, however, these initiatives will form organically once a few programs and policies are initiated.

Starting right now is the most valuable of all actions, and in time, Alberta will prove that it is not just a music-rich province, it is also a national leader in music opportunity. Soon after, the positive results will reveal themselves.

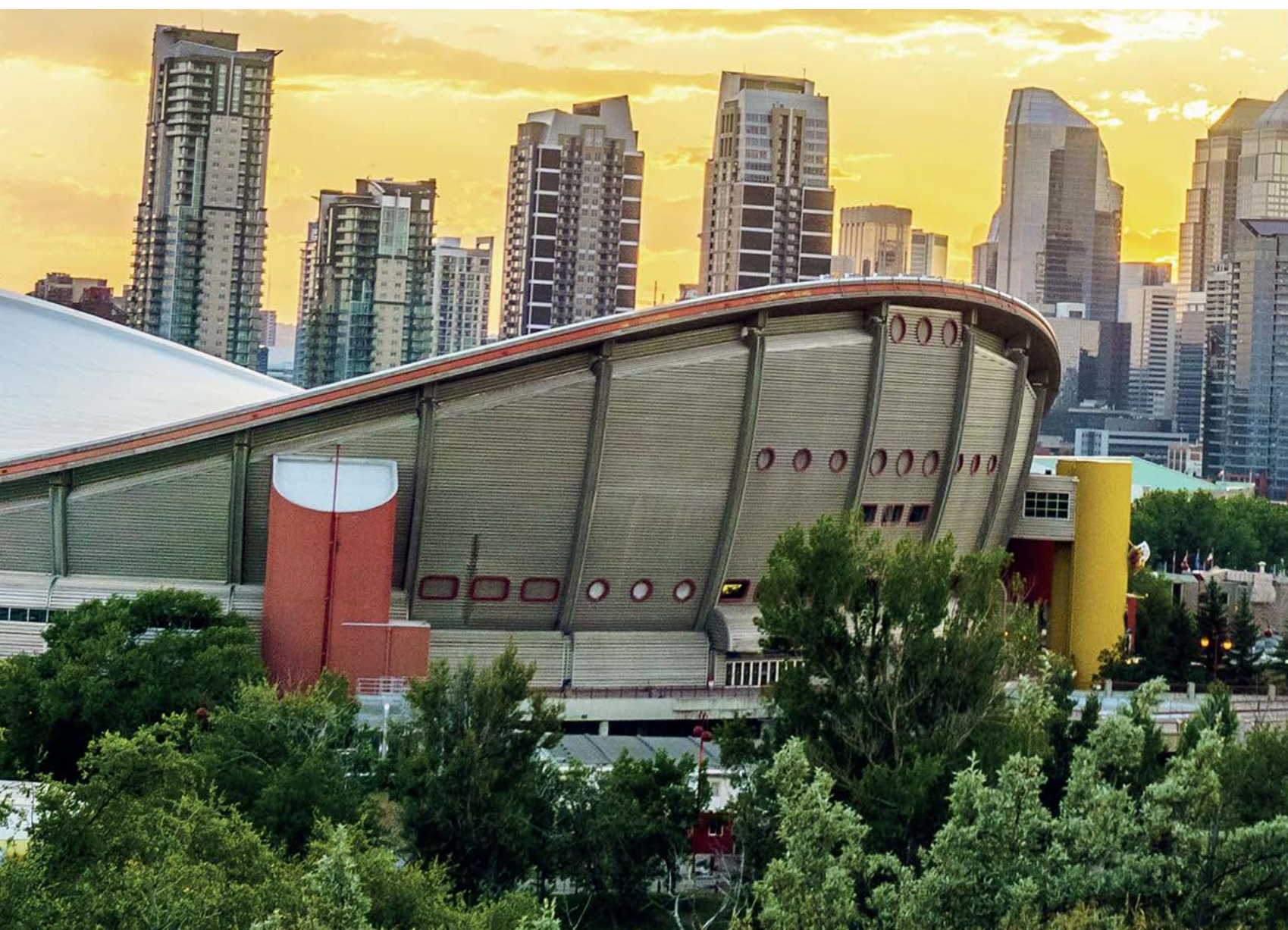


ABOUT WEST ANTHEM

West Anthem is a non-profit, non-governmental organization created to share information and foster new conversations that highlight the cultural, social and economic benefits as well as the necessary strategies required for developing music cities in Alberta. West Anthem commissions research studies, produces events and provides advice to the private and public sectors regarding the development, sustainability and resilience of the music industry in Alberta. West Anthem's volunteer steering committee is comprised of individuals who work full-time and/or have significant experience working in the music industry in Alberta. For more information, please visit westanthem.com.

ABOUT SOUND DIPLOMACY

Sound Diplomacy is the leading global advisor on music cities strategies and market development. As strategists for cities, developers, large private sector organizations and governments, Sound Diplomacy provides cutting edge research and market expertise in placing music and music business strategy in city, urban and development plans. They work in over 40 countries and with over 100 clients, spanning public, private and third sectors, such as the Greater London Authority (UK), the cities of Vancouver, Huntsville (Alabama), New Orleans (Louisiana), San Francisco (California), Brisbane (AUS), Cardiff (UK), the regions of Northwest Arkansas (Arkansas) and The Shoals (Alabama), and organizations such as the United Nations Industrial Development Organization (UNIDO). For more information, please visit sounddiplomacy.com.



CONCLUSION

Music has unlimited potential. It has the power to alter our lives, improve our mental health, develop our communities, sustain a city, and more. The recommendations offered in this study aim to bring more value to music in Alberta, while utilizing its potential to its maximum capacity.



ACKNOWLEDGEMENTS

Responding to the need to more thoroughly understand the music ecosystem in Calgary and Edmonton, West Anthem commissioned Sound Diplomacy to prepare this new study. Members of West Anthem's Steering Committee include:

Andrew Mosker, Chair
President & CEO, National Music Centre

Adam Fox
Director of Programs, National Music Centre

Carly Klassen
Executive Director, Alberta Music

Jeff Hessel
Senior Vice President, Marketing, Tourism Calgary

Graham Lessard
Music Producer and Recording Engineer

Allison Pfeifer
Board Member, Alberta Music

Greg Curtis
Impresario, Tooth Blackner Presents

Kaley Beisiegel
West Anthem, Lead Consultant

Sound Diplomacy and the West Anthem Steering Committee would like to thank every individual who worked with us, including Joni Carroll and Kaley Beisiegel for their invaluable contributions to this project. In addition, Sound Diplomacy and the West Anthem Steering Committee would like to thank those who took an interest in the report, responded to the survey, attended a roundtable and shared information. Your participation and input have been invaluable and the work could not have been completed without it.

THANK YOU TO OUR SPONSORS OF THIS REPORT:

Alberta Music Industry Association
Edmonton Arts Council
Calgary Arts Development
Calgary Economic Development
Explore Edmonton Corporation
Government of Alberta
Scotlyn Foundation
OCL Studios
National Music Centre
Winspear Centre

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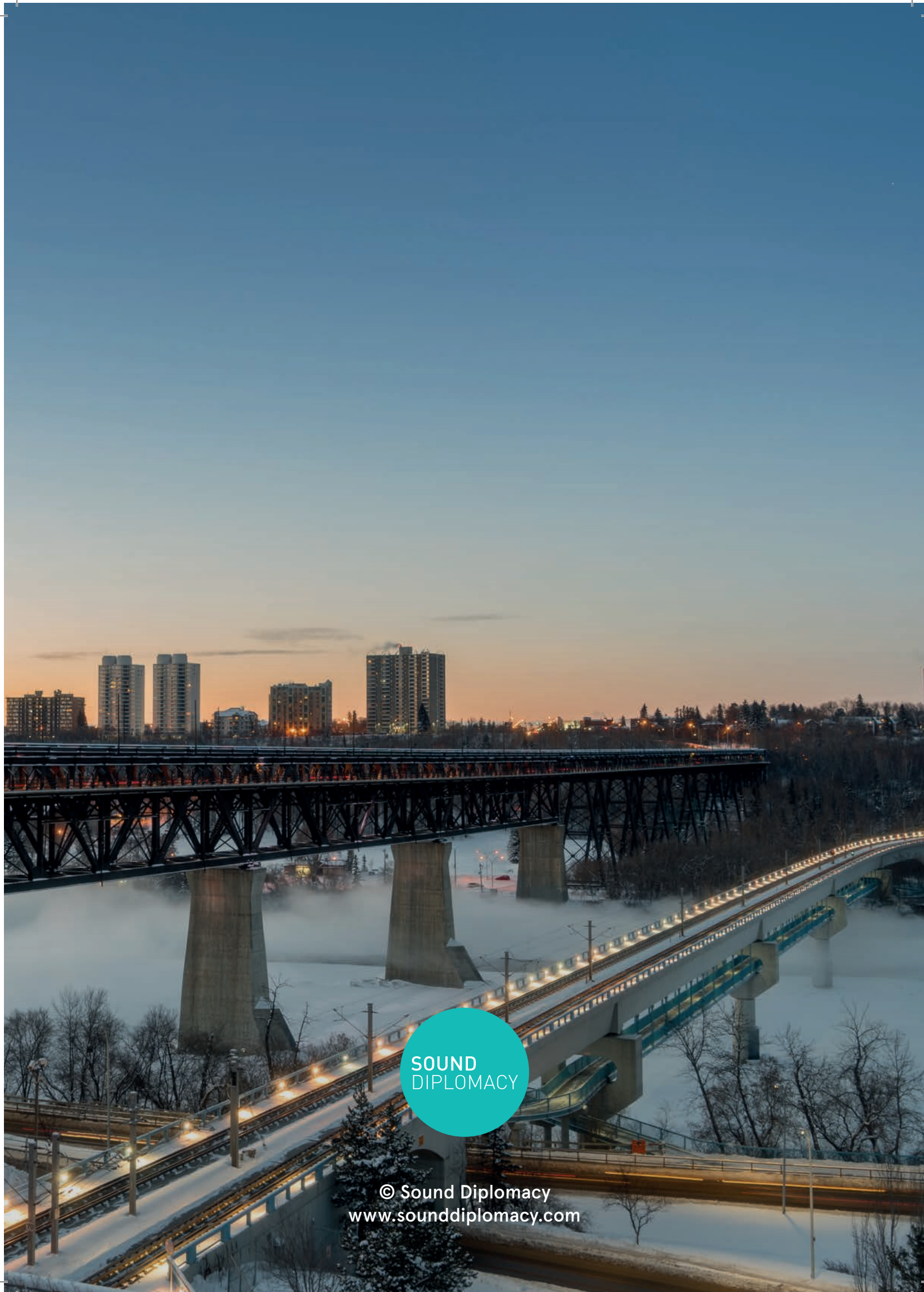
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