

**PROFILE AND
ECONOMIC IMPACT OF
THE MUSIC INDUSTRY
OF NEW BRUNSWICK**

Final Report

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*For Music NB Inc.
(Music Industry Association of New Brunswick)*

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1.0 Executive Summary

Étude Économique Conseil inc. (EEC Canada) was mandated by Music New Brunswick (MNB) to profile the music industry of New Brunswick and to estimate its economic impact.

After a thorough documentary research, administering an extensive electronic and postal survey, and numerous discussions with key industry players, EEC Canada presents its findings in the following document.

1.1 Industry Size and Revenues

EEC Canada has estimated there are approximately 1,250 individuals (+/- 10%) working in the music industry of New Brunswick.

The table below presents the estimated number, as well as the percentage breakdown, of individuals working in the music industry according to their specified principal activity.

Individuals According to Principal Activity

Principal Activity	Individuals	%
Song Writing	265	21.2
Performing Music	835	66.8
Total Artists	1,100	88.0
Managing Artists	22	1.8
Booking Concerts	0	0.0
Releasing Albums	0	0.0
Recording Albums	32	2.5
Distributing Albums	1	0.1
Producing Albums	10	0.8
Engineering Albums	0	0.0
Sound Technician	9	0.7
Music Teaching	13	1.1
Promoting Concerts	22	1.8
Publishing Music	4	0.4
Manufacturing Albums	0	0.0
Other	36	2.9
Total Other Professionals	150	12.0
Total Industry	1,250	100.0

Source: EEC Canada, 2003-2004

Note the high proportion of artists vis-à-vis other professionals. This proportion (88%) suggests a weakness in the province's infrastructure (this is especially true given that 3% ('other') of the remaining 12% are not, strictly speaking, industry professionals, refer to section 2.3.1 *Defining the Music Industry* for more details). There are simply not enough professionals working in the industry to exploit the potential added-value that these artists represent. The fact that there are no individuals booking concerts or releasing albums in the province as their principal activity exacerbates this.

For the great majority of individuals working in the industry, music-related activities take up only a portion of their total work time. Furthermore, most of them perform more than one type of activity within the industry (for example performers also book concerts and release albums, those who record albums also tend to do some artist management, etc.).

The table below presents the number of full-time equivalents (FTEs) that perform the corresponding activities in the industry. Note that the estimated 1,250 individuals working within the province corresponds to 777 FTE, approximately to 62% of the total.

Full-Time Equivalents (FTE) According to Activity

Activity	Full-time equivalent (FTE)
Song Writing	152
Performing Music	534
Total Artists	680
Managing Artists	11
Booking Concerts	7
Releasing Albums	3
Recording Albums	17
Distributing Albums	5
Producing Albums	6
Engineering Albums	7
Sound Technician	3
Music Teaching	13
Promoting Concerts	6
Publishing Music	1
Manufacturing Albums	0.16
Other	17
Total Other Professionals	97
Total Industry	777

Source: EEC Canada, 2003-2004

The table below presents the breakdown of music-related revenues according to revenue category for individuals working in New Brunswick.

Distribution of Industry Revenues for 2002

Revenue Category	%
less than \$5,000	38.0
\$5,001-\$10,000	14.1
\$10,001-\$20,000	20.7
\$20,001-\$30,000	12.0
\$30,001-\$40,000	6.5
\$40,001-\$50,000	1.1
\$50,001-\$75,000	3.3
\$75,001-\$100,000	0
\$100,001-\$500,000	4.4
Total	100

Source: EEC Canada, 2003-2004

It is interesting to note that 38% of the industry earned less than \$5,000 in 2002; over 50% earned less than \$10,000. This explains the need for industry participants to allocate much of their working time to activities outside of music.

The table below presents industry revenues for 2002 according to the stated principal activity of respondents.

Industry Revenues According to Principal Activity for 2002

Principal Activity	\$	%
Song Writing	\$2,324,879	11.7
Performing Music	\$10,438,233	52.5
Total Artists	\$12,763,112	64.2
Managing Artists	\$1,696,533	8.5
Booking Concerts	n.a.	n.a.
Releasing Albums	n.a.	n.a.
Recording Albums	\$572,855	2.9
Distributing Albums ¹	xxx	xxx
Producing Albums	\$77,115	0.4
Engineering Albums	n.a.	n.a.
Sound Technician	\$286,428	1.4
Music Teaching	\$154,230	0.8
Promoting Concerts	\$1,057,579	5.3
Publishing Music	\$11,016	0.1
Manufacturing Albums	n.a.	n.a.
Other	xxx	xxx
Total Other Professionals	\$7,116,627	35.8
Total Industry	\$19,879,740	100.0

Source: EEC Canada, 2003-2004

Total music industry revenues for the province in 2002 were estimated a \$19.9 million (+/- 10%). Note that despite representing 88% of the activity, those whose principal activities are song writing or performing music generated 64.2% of industry revenues.

Finally, the table below presents music industry revenues for 2002 according to market, as well as the proportion generated by artists and other professionals.

Note that despite the absence of individuals in the province committed to releasing albums and booking concerts revenues from such activities are generated.

As could be expected, performing represents the largest revenue category, the majority of which is generated by artists. The largest professional category is the 'other' category, corresponding to activities such as producing and directing music videos, radio, managing music venues and retail.

¹ Note that there is only one player in the province whose principal activity is 'distributing'; consequently, numbers from this activity have been withheld for reasons of confidentiality. Data from 'other' has also been withheld so prevent data for 'distributing' from being deduced.

Music Industry Revenues According to Market for 2002

Activity (transactions)	Artists (songwriters and performers)	Other Professionals	Total market
Song Writing	\$1,027,217	\$61,692	\$1,088,909
Performing Music	\$9,086,008	\$212,618	\$9,298,625
Managing Artists	\$14,234	\$713,315	\$727,549
Booking Concerts	\$99,638	\$726,535	\$826,173
Album Sales	\$860,680	\$61,692	\$922,372
Royalties	\$311,249	\$194,991	\$506,240
Recording Albums	\$256,211	\$314,630	\$570,841
Distributing Albums	\$13,285	\$66,099	\$79,384
Producing Albums	\$17,081	\$271,666	\$288,746
Record Engineering	\$35,585	\$62,353	\$97,938
Sound Technician	\$91,097	\$154,230	\$245,328
Teaching	\$523,810	\$328,511	\$852,320
Promoting Concerts	\$56,936	\$842,208	\$899,144
Publishing Music	\$14,234	\$168,552	\$182,786
Manufacturing	\$0	\$7,712	\$7,712
Other	\$355,849	\$2,929,825	\$3,285,674
Total	\$12,763,112	\$7,116,627	\$19,879,740

Source: EEC Canada, 2003-2004

1.2 Economic Impact

There are two steps involved in determining the total economic impact of the music industry on the economy of New Brunswick.

- I. The first consists of estimating the direct impact of the industry, that is to say, the sum of salaries and revenues of individual workers and profits from companies working in the music industry.
- II. The second step consists of estimating the indirect (and induced) impact of the industry, in other words, the impact the music industry has on other sectors of the economy.

1.2.1 Direct Impact

The data used to estimate the direct impact of the music industry on the provincial economy stems from a variety of sources.

Data concerning salaries, revenues and profits from song writing, performing, managing artists, booking concerts, selling albums (excluding retail), royalties, recording, distributing, producing, engineering albums, sound technician, teaching music (excluding teaching in schools and universities), promoting concerts and publishing music is derived from the survey that was administered for this study.

Data concerning salaries and profits from professional arts organisations (for example the New Brunswick Symphony), community arts organisations and associations related to music is derived from the databases of the Arts Development Branch of the Culture and Sports Secretariat of New Brunswick.

The total direct impact from artists, industry professionals and companies working in the music industry is \$16,594,066.

This amount corresponds to the total industry revenues estimated from the survey (\$19,879,740) less the amount generated from activities grouped under the “other” category (\$3,285,674).

The total direct impact from professional arts organisations, festivals, community arts organisations and associations working in the music industry is \$3,200,370.

This amount is broken down as follows: profits from professional arts organisations (\$774,070), the music portion of festivals (\$1,810,594) and community arts organisations and associations (\$615,706).

The total direct impact from the music industry on the provincial economy is \$19,794,436.

1.2.2 Indirect Impact

Due to the nature of its activities, the music industry is in constant interface with several sectors of the economy. For example, music industry professionals regularly call upon the services of lawyers, accountants, photographers, graphic designers and printers when it comes to signing a contract, preparing financial statements and releasing a musical product.

Furthermore, the impact of the music industry on the sale of musical instruments, the sale of musical albums (CD's, cassettes, records, etc.), performance venues, broadcast media such as television and radio, the film and video industries are evident.

Through a series of complex yet very logical series of transactions, the music industry also has an important impact on industries and businesses such as tourism, retail, restaurants, hotels, transportation and bars.

Finally, it should be considered that each person who is exposed to the music industry via a transaction (from a lawyer who prepares a contract, to a waiter who receives a tip from a tourist visiting the region to attend a music festival) in turn also consumes from the monies received indirectly through music.

This cumulative reinforcing interaction between consumption and production whose origin is the music industry is referred to as *indirect* and *induced economic impact*. The process is simply based on the circular flow involved when people receive income by producing goods and then spend this income on additional production.

As could be imagined, this circular flow as it pertains to the music industry of New Brunswick in particular would be very difficult to track. Consequently, for the purposes of this study, we decided to use a multiplier that was provided by Statistics Canada specifically for the music industry. A 'multiplier' is an estimate of the indirect and induced effects of a particular activity on the overall economy. It was produced by setting up a complex set of input-output tables regarding the music industry.

The multiplier supplied by Statistics Canada for the music industry ranged from 1.68 (to estimate the minimum indirect impact) to 1.98 (to estimate the maximum indirect impact).

The total indirect impact from the music industry on the provincial economy using the minimum multiplier is \$13,460,217.

The total indirect impact from the music industry on the provincial economy using the maximum multiplier is \$19,398,548.

1.2.3 Total Economic Impact

The total impact from the music industry on the provincial economy is estimated to fall between \$33,254,653 (minimum) and \$39,192,984 (maximum).

1.3 Observations and Conclusions

The following section is divided into two parts. The first part presents observations on the music industry as a whole, while the second part provides EEC Canada's recommendations.

Observations

The present analysis is largely based on key indicators presented in the report. Relevant data taken from other sources and reports, used to confirm or reinforce the current analysis, was also considered. For the sake of clarity, observations will be numbered and presented in proposition form.

1. **The number of musical artists (songwriters and performers) reported in New Brunswick, 1,100, appears sufficient and appropriate given the population of the province** (approximately 750,000 inhabitants according to Statistics Canada).

If we were to consider musical artists originally from New Brunswick who have pursued their careers outside the province, the number would have been higher.

2. **The number of professionals (also referred to as professional infrastructure) reported in New Brunswick committed to supporting musical artists, 150, is low.**

The proportion of professionals to musical artists, 12% (or approximately 9% once the 3% from 'other' has been rightly excluded), is insufficient to adequately support the number of musical artists.

3. Industry revenues generated from song writing, performing and royalties amounted to \$10,893,775 in 2002. This means that the 1,100 musical artists were able to earn an average of close to \$9,900 from their principal activity.

Such per capita revenues are very low. However, they are *to be expected* given the overwhelming lack of professional infrastructure in the province.

4. **From a cultural perspective, the real consequence of the lack of industry infrastructure is that musical artists are unable to develop their creative and commercial potential while remaining in the province.**

In real terms, this means that musical artists who are more ambitious (regardless their level of talent) feel it is necessary to leave the province and pursue their careers elsewhere *because they cannot find the necessary infrastructure in New Brunswick*.

5. **From an economic perspective, the real consequence of the lack of industry infrastructure is that the potential added-value from exploiting the province's musical talent is not realised.**

In real terms, this means that the provincial economy could benefit significantly with the proper infrastructure in place to develop this potential.

6. At this point, a few questions beg to be asked:

Q1: Are New Brunswick musical artists talented enough to warrant a greater infrastructural base?

Behind this simple question is the notion that perhaps the level of success of musical artists working in New Brunswick is more a function of their talent than any structural insufficiencies of the industry.

This is a valid argument. However, if we consider the number of talented New Brunswick artists in recent history that have moved on to attain national and international success, we find that the argument does not stand up to the facts.²

The reality is that New Brunswick has been home to more than its share of successful musical artists, and there is no reason to believe that it will not be home to more. There will be more. **The point is, whether these musical artists will be able to develop their talent and careers in New Brunswick, and whether the New Brunswick economy will benefit from these careers.**

This point leads us to the second question:

Q2: Is New Brunswick large enough to support a larger music industry?

This is also a valid question. The fact may be that New Brunswick is too small a province to aspire retaining its musical talent. Perhaps it is natural that talented musical artists who wish to attain their creative and commercial potential should need to leave the province to do so.

There are two ways to tackle this question.

One way consists of creating an econometric model with the characteristics of the New Brunswick economy and playing with it to see whether the province is large enough to support a music industry that demonstrates sufficient and necessary industry dynamics. This task is outside the scope of the present study.

A simpler, yet equally conclusive way involves comparing the music industry of New Brunswick to another music industry with characteristics comparable to those of New Brunswick.

Due to its proximity, comparability with respects to size, as well as the availability of relatively recent data³, we compared the music industry of New Brunswick with that of Nova Scotia.

² In case there is any doubt, the following list, although incomplete, should convince even the most hardened sceptic: Chris Commings, Marie-Jo Therio, Janine Boudreau, Julie Doiron, Pierre Robichaud, Lina Boudreau, Julian Austin, Sherley Myers, Jean-Francois Breau, Nathalie Renault, Michel Theriault, Natasha St-Pierre and Rock Voisine. Bands in New Brunswick that are being managed or booked by outside agencies include Glamour Puss, J.P. Leblanc, Danny Boudreau, Mathieu D'astout and Edith Butler.

³ Data on the Nova Scotia music industry has been taken from the document entitled *1999 Music Industry Survey: Assessment of the Nova Scotia Music Industry*, prepared by Lyle Tilley Davidson.

The Case of Nova Scotia

Nova Scotia has a population of 936,878 inhabitants. In 1999, the direct economic impact of its industry was estimated to fall between **\$52.4 and \$58.6 million** (once music teachers have been subtracted).

New Brunswick has a population of 750,460 inhabitants. The direct economic impact of the music industry of New Brunswick has estimated in the currently study to represent **\$20 million**.

The population of Nova Scotia is 187,000 more than that of New Brunswick (approximately 25% more).

Although it is difficult to compare both figures (due to important methodological differences and because Nova Scotia figures are in 1999 dollars), we can observe a difference of 250% between the two provinces in terms of direct economic impact (the difference would have been 300% if the less conservative estimate was considered).

In other words, with a population base 25% greater than that of New Brunswick, Nova Scotia's music industry has an economic impact that is at least 250% larger.

What this simple comparison conclusively demonstrates, is that the music industry of New Brunswick has room to grow.

7. How much the New Brunswick music industry can grow, and its rate of growth, will largely depend on the measures taken to promote the development of the industry

Even so, EEC Canada is confident that there are sufficient talented musical artists in the province to attain an economic impact that is much larger than its current impact, and that path to increasing the economic impact is by strengthening the industry's infrastructural base.

Once important lapses in the industry's infrastructural base have been successfully addressed, EEC Canada estimates the music industry of New Brunswick could double its direct economic impact to over \$40 million. This represents a total economic impact ranging from \$67 to \$79 million.

Recommendations

Based on its findings, EEC Canada was asked to provide recommendations to the music industry of New Brunswick. Two points deserve mention:

1. **Future industry initiatives seeking to develop the music industry further should concentrate on strengthening the infrastructural base.**

Over the past few years, the province of New Brunswick made a considerable effort to promote the sound recording sector of the music industry. Indeed, since it established the Sound Initiative, administered by the Arts Development Branch of the Culture and Sports Secretariat, experienced and emerging performers with talent were able to look to its own province to finance sound recording projects. Also through the program, recording studios

were able to invest in state-of-the-art equipment in order to guarantee the quality of these recordings.

However, performers cannot find record labels within the province to ensure a proper release and a sustained and effective marketing effort for their quality recordings. Nor can the performers find booking agents to organise tours so that their releases may be properly promoted. Most likely, musical artists will take care of such tasks themselves. To make matters worse, they are hard pressed to find competent and committed managers to help them do it.

For these reasons, EEC Canada recommends that the province take the next step in developing the music industry, which involves strengthening the infrastructural base.

As was demonstrated above in point 5 (refer to the section entitled *Observations*), strengthening the industry's infrastructural base would not only be good for the industry from a cultural perspective, but it would also represent an interesting economic investment, one that promises an interesting return for the province.

Concretely, this means that the province should allocate additional resources to this end. Simply adding financial resources to strengthening the infrastructural base is not enough. Rather, the province should think in terms of establishing the necessary conditions for individuals who have accumulated experience releasing albums, promoting artists, booking tours and managing artists to emerge and form the basis for an infrastructural core.

Details concerning the exact configuration and organisational structure that would be required to create this core have yet to be determined. Nevertheless, it is clear that it would need to bring together artists and professionals together with the common goal of promoting careers, and establishing a dynamic nucleus from which the future development of the industry could emerge.

2. Monitor the development of the New Brunswick music industry on a regular basis.

Thanks to the deployment of the industry-wide survey, policy makers, interested institutions and motivated individuals interested in the future development of the industry now have valuable quantitative and qualitative data on the music industry in New Brunswick at their disposal to inform critical policy decisions that will have an impact on the future of the industry.

EEC Canada recommends the monitoring of the music industry of New Brunswick on a regular basis (say every 5 years) in order to measure the future development of the industry as well as to inform the relative success of all future initiatives.

2.0 Introduction

Following a competitive bidding process, Étude Économique Conseil inc. (EEC Canada) was commissioned by Music New Brunswick (MNB) in the autumn of 2003 to profile the music industry of New Brunswick as well as to assess its direct economic impact.

The major objective of the study was the desire to quantify the musical activity of the province, both in human and financial terms, so that policy makers, interested institutions and motivated individuals could better assist in furthering its development.

The present document is the principal result from the study. It required a lot of effort from several individuals and institutions. EEC Canada would particularly like to thank Music New Brunswick (MNB), the Arts Development Branch of the Culture and Sports Secretariat of New Brunswick and the Atlantic Canada Opportunities Agency for their trust and support.

Including the present introduction, the report is divided into six sections.

The first section is an Executive Summary, which summarises the study's key findings, observations and recommendations.

Section 2 presents a brief description of the study's mandate and objectives, the methodology that was used, as well as the major methodological considerations that were faced.

Section 3 provides a brief discussion of the demographic, urban and linguistic context of the New Brunswick music industry

Section 4 provides the results of the industry-wide survey administered by EEC Canada. This section is divided into 9 sub-sections. The first sub-section provides a picture of the music industry as a whole, while subsequent sub-sections deal with particular activities of the music industry, such as singing and performing, managing artists, producing albums, releasing albums, recording albums and distributing albums. Sub-sections dealing with the size of the industry and industry revenues complete the fourth section.

The fifth section is devoted exclusively to determining the economic impact of the industry on the province, while section 6 attempts to bring many of the elements touched upon throughout the report into a coherent analysis, ultimately pointing the way for future initiatives that would lead to releasing the industry's growth potential.

2.1 Mandate

There is a general lack of quantitative data regarding the size and organisation of the music industry in New Brunswick. This lack of information prevents many institutions interested in the province's economic and cultural development from being able to determine *if* and *how* they should get involved in initiatives aiming to further the development of the sector. Furthermore, given this lack of data, initiatives (public or private) are unable to estimate their impact on the industry and hence often have difficulty justifying any continuing support.

With this in mind, the mandate of the present study can be broken down into the following objectives.

a) Profile the music industry

The first objective consists of profiling the economic activity that constitutes the music industry in New Brunswick. In other words, EEC Canada was asked to determine *who* does *what*, *where* and to extent possible, *how often*.

b) Assess direct economic impact

The second objective involves assessing the direct economic impact of the music industry in New Brunswick. Concretely, this means determining the sum value of individual transactions in the New Brunswick music industry.⁴

c) Estimate indirect economic impact

EEC Canada was asked to estimate the indirect impact of the music industry in New Brunswick. This means estimating the complex sets of transactions occurring between sectors as well as the positive externalities and spin off economic effects of the music industry in New Brunswick on other industries in the economy.

d) Interpret findings

EEC Canada was asked to draw upon its expertise developed in the course of this, as well as other studies (*Evaluation of the New Brunswick Sound Initiative*, *Evaluation of Factor/MusicAction*, amongst others) in order to put the findings into perspective.

e) Analyse findings and provide recommendations

EEC Canada was asked to analyse its findings of the profile and the economic impact assessment, identify its strengths and weaknesses, as well as to provide recommendations that would lead to future growth for the sector.

⁴ To the best of our knowledge, no other study in the past has attempted to profile and assess the economic impact of the music industry in New Brunswick to the extent envisioned by this study. Consequently, all data to be used by this profile had to be build from scratch. In addition, given that no benchmarks have been previously established in the province, the results of the study could not be compared to any earlier period. However, it is hoped that subsequent studies will make use of these findings for comparative purposes in order to gauge future developments.

2.2 Methodology

In order to meet the objectives outlined above, EEC Canada undertook a series of activities, including:

a) Documentary research

Reports, statistics and newspaper articles dealing with the music industry in New Brunswick and elsewhere were collected and reviewed. Such documents informed the present study on a range of subjects and indicated current trends in the industry. Of particular interest were recent documents prepared in other provinces from studies that shared similar objectives.

As mentioned above, it was not possible to find reliable statistics on the music industry in New Brunswick or on its economic impact. Although Statistics Canada has been conducting a nationwide survey of the sound recording industry on a regular basis for some time, no data dealing exclusively with the industry in New Brunswick has ever been divulged for reasons of confidentiality.

In addition, documentary research was also conducted in areas where the music industry had a strong indirect economic impact, such as tourism and festivals,

b) Conduct an electronic survey

Given the lack of statistical data available on the music industry in New Brunswick, the study placed much emphasis on creating a precise, reliable and representative database that would reflect the activities and transactions of as many individuals and enterprises working in the province as possible. Ultimately, the exploitation of this database would enable us to draw an accurate profile of the industry as well as determine its direct economic impact with a high degree of confidence.

c) Conduct focus groups

The possibility of conducting focus groups was envisaged at the start of the study. One such focus group was conducted, the subject of which was exploring the potential for partnerships between the tourism and music industries. A brief resume of the focus group can be found in the appendix of this report.

2.3 Methodological Considerations

From the start, it was necessary to clarify two key elements, which would ultimately have very important consequences on the methods used to conduct the study as well as the results that would be obtained; namely, the definition of the music industry and the nature of the economic impact that is to be measured.

2.3.1 Defining the Music Industry

The first consideration was how to define the music industry. Given that there were as many definitions for the music industry as there were individuals willing to provide one, made for very stimulating debate. Naturally, the activities that would be included or left out of the definition of 'the music industry' would have a very important impact on the ensuing size of that industry. A point made by several industry members was that the influence of music was extensive in the province and that any assessment of its economic impact should reflect this fact.

The point made by such individuals is a valid one. The impact of the music industry on activities and industries as diverse and important as radio, television, tourism, the retail of musical products and instruments, music teaching and festivals cannot be overstated. Indeed, the music industry is an important partner of each of these activities and industries and the presence of a dynamic and burgeoning music industry can only represent positive externalities for them.

However, the question remains, should such activities be included in the definition of the music industry for the purposes of this study. To answer this question, it is best to consider the eventual usage of the report, which is to create a tool that would be invaluable to policy makers and partners interested in promoting and further developing the music industry *in New Brunswick*.

Consequently, it was thought best to circumscribe the industry as it functioned as an economic sector. That is to say, consider the all the activities involved in creating, performing, managing, recording, promoting, and distributing a musical product from its conception to final consumption. This would include activities such as:

- song writing
- singing/performing
- managing artists
- booking concerts
- releasing albums
- recording albums
- distributing albums
- producing albums
- engineering albums
- sound technician
- promoting concerts
- publishing music
- manufacturing albums

However, activities and industries such as radio, television, tourism, the retail of musical products and instruments, bar sales and festivals, although linked to the music industry, are, for different reasons, either not an integral part of the music industry, or at least, not an integral part of the music industry *of New Brunswick*.

For example, although industries such as radio, television, tourism, etc. often use music to attract an audience and visitors, they are not dependent on musical products to do so. This argument also holds true for professionals such as lawyers, accountants, photographers and graphic designers. Although such professionals often benefit from an active music scene in the preparation of contracts, financial statements, posters and album covers, it would be as unrealistic to consider the execution of such services as part of the music industry as it would be to consider the preparation of the present report as part of the music industry.

Activities such as teaching music and the sale of musical instruments were not included in the study for the simple reason that they are not part of the music industry. Although this might seem counter-intuitive at first, it becomes more evident with the help of an analogy. Consider a country that is not involved in fishing: there are no fishing companies, no individuals selling their catch on the market, and all the fish it consumes is imported from other countries. However, there are individuals who teach fishing techniques in schools. Would it make sense to claim that by virtue of these teachers the country possesses a fishing industry? Of course, it would not. Rather, it would make more sense to consider teaching fishing as part of the education industry. Likewise, the fact that stores sell fishing rods and tackle at the retail level does not constitute a fishing industry. No more than selling paper constitutes a book publishing industry.

The case is different for the retail of musical albums. On the one hand, the sale of musical products produced elsewhere in Canada and internationally should not be considered as an impact of the New Brunswick music industry. No more than sales from a garment retailer located in Moncton of clothes fabricated in Indonesia are an impact of the New Brunswick garment industry. However, retail sales of New Brunswick artists and labels in New Brunswick and abroad are part of the New Brunswick music industry. For reasons of practicality and reliability, it was thought best to capture this impact by considering the sales of New Brunswick record labels and the royalties paid to New Brunswick artists rather than trying to delineate the New Brunswick portion of retail sales around the world.

As can be concluded from this discussion, the definition of the music industry for the sake of this report was not easy. A range of activities and services often associated with music were carefully considered with respect to their relevance to individuals and institutions most likely to use the information, data and analyses provided for further developing the industry. Ultimately, choices were made, and these choices should be considered when comparing the relative importance of the New Brunswick industry with other industries across Canada and abroad. Finally, a decision to include or exclude a particular activity in the definition of the music industry for the purposes of *this study* does not necessarily mean that the activity should or should not be included in the definition of the music industry other studies. That would be up to the authors of those studies to decide, depending on their objectives.

2.3.2 Defining Direct Economic Impact

Direct economic impact is an estimate of the net contribution of an industry on a given economy. There are two methods widely used to estimate direct economic impact. The first method considers the supply-side of the economic model, and the second method considers the demand-side.

1) Supply-side method

The supply-side method of determining direct economic impact is the sum of the value-added of an industry on a given economy. Concretely, this consists of adding together all the net revenues of enterprises and with all the salaries and royalties received of all individuals involved.

2) Demand-side method

The demand-side method of determining direct economic impact is to add all investments made in an industry to total consumer expenditure with the difference between exports and imports (trade balance).

Ultimately, both methods lead to the same results and one method is usually chosen over the other according to its relative ease of use. For the purposes of the present study, it was deemed simpler to question individuals and enterprises working in the music industry on their revenues than it was trying to create the necessary data to calculate direct economic impact according to the demand-side method.

2.3.3 Professions vs. Activities

After interviews with many important players of the New Brunswick music industry (conducted in the spring on 2002, during the evaluation of the Sound Initiative), EEC Canada was able to learn that that practically everyone was involved in more than one type of activity. This means that performers also act as managers and booking agents. It also means that recording studios sometimes play the role record labels. In other words, faced with a lack of professional infrastructure, individuals interested in performing often had to do all or part of the managing, the promoting, the booking, the distributing, etc. of their projects.

The challenge with profiling an industry where many people do a little bit of everything is capturing transactions for particular services by individuals who *are not considered* or *who do not consider themselves* professionals of that service. In other words, although there may be very few professionals in New Brunswick specialised in booking concerts (actually none), concerts do get booked. Therefore, in designing the questionnaire, special consideration was made to capturing the extent of such activities as well as trying to understand who does them.

The solution to the challenge consisted in delineating the industry a little differently than it is traditionally delineated. As opposed to categorising individuals into clean and distinct professions, such as songwriters, performers, managers, booking agents, etc., which would not reflect the reality of what is actually going on, the survey allowed individuals to express their versatility by identifying themselves in terms of all the activities that they do, to the extent that they do them.

3.0 Context of the New Brunswick Music Industry

The purpose of this section is to present key contextual elements of the music industry of New Brunswick. These elements are believed to have an important impact on the state of development of the New Brunswick industry and should be considered while reading the survey results.

3.1 Demographic Context

With a population of just over 750,000, New Brunswick rates among Canada's smallest provinces along with Newfoundland and Labrador (520,170) and Prince Edward Island (137,941). There is no doubt that there is a strong relationship between population size and the presence of a developed and dynamic music industry. Without a sizable market to encourage and support local talent, musicians will have a difficult time, amongst other things, finding opportunities to perform live as well as creating partnerships with experienced and dedicated professionals. These factors are critical for the following reasons:

- A. Live performances play a critical role in the development of a performer's career:
 - It provides a regular revenue stream for artists in the area of their art. In other words, the more opportunities artists have to perform, the more artists will be able to live from their art. This ability not only encourages artist to pursue their careers as artists, but it will also decrease the need for artists to supplement their incomes from activities that lie outside the realm of the music industry.
 - It provides an opportunity for a musician to be seen and heard performing music they intend to record. In other words, it is the greatest form of promotion.
 - It constitutes a type of market research for a musician or band. Immediate audience reaction to a particular song or repertoire enables musicians to test their product and make adjustments prior to recording.

In New Brunswick, there are fewer opportunities to perform live than in regions with larger population bases. The reasons are clear, a small population means fewer venues and a more limited audience potential. Musicians from New Brunswick who want to perform regularly must cover a greater geographic area than do musicians from areas such as British Columbia, Ontario and Quebec.

- B. A small population base also makes it difficult for musical artists to find experienced and dedicated professionals with whom they could make strategic partnerships.
 - Without a market large enough to generate sufficient levels of revenue, entrepreneurial individuals with a talent and passion for music will have little or no incentive to commit their time or energy to promoting (as an artist manager, record label, booking agent, etc.) talented musicians with potential.

It is true that New Brunswick's population base represents an important challenge to the future development of the local music industry. However, if we compare it to others with similar populations, it becomes evident that it is not too small to sustain a music industry *significantly larger than it is currently* (this point will be elaborated at greater length later in the report).

3.2 Urban Context

New Brunswick's urban context is an equally important consideration to take into account when trying to understand factors affecting the development of its music industry. The fact is that New Brunswick's urban base is fragmented into several smaller cities that are spread across the province.

This point is well illustrated by the following facts:

- New Brunswick's population is approximately 44% larger than that of Newfoundland and Labrador. However, St. John's, Newfoundland is approximately 100,000, compared to 70,000 for Saint John, 61,000 for Moncton and 48,000 for Fredericton.
- With a population approximately 25% larger than New Brunswick's, Nova Scotia's largest urban centre, Halifax, is approximately twice as populous as the combined population of Saint John, Moncton and Fredericton.

The fragmentation of New Brunswick's population means that its resources (both capital and human) are scattered across the province. This makes it difficult for artists and professionals to come together in one area to form, both geographically and symbolically, an industry core.

3.3 Linguistic Context

Finally, New Brunswick's linguistic context also constitutes an important factor in understanding its level of development. While the co-existence of both French-language and English-language communities (according to 1996 census results, approximately 33% of the province is French speaking) represents a cultural richness for the province, it is also true that it serves to further fragment cultural markets.

Of course, there are many examples of French-speaking artists working with English-speaking professionals, and vice versa, but to a large extent, at least professionally, both worlds tend to function independently of one another. For example, for a province the size of New Brunswick, one would assume that one distributor is sufficient. But the fact is that Distribution Plages, the province's sole distributor, distributes only French-language artists.

3.4 Conclusion

The small population of New Brunswick, exacerbated by its geographic and cultural fragmentation, makes sustaining an industry infrastructure considerably more difficult in New Brunswick than it does in areas where populations are similar but more concentrated.

An entrepreneur setting up in Moncton, Saint John or Fredericton, for example, would not benefit from the same critical mass as an entrepreneur in Halifax, or even St. John's, where they could draw upon more human resources, operate from a bigger client base, and where there is generally more potential for activity.

This said, New Brunswick's geographic and cultural fragmentation also constitutes one of the province's strengths. With fragmentation comes diversity and the different musical styles and genres coming out of the province testifies to this fact. Furthermore, once exploited to its potential, this diversity could permit musical products from New Brunswick to reach a wide range of markets across Canada and the world.

4.0 Survey Results

The following section presents the results from electronic/postal survey administered by EEC Canada to artists, music industry professionals and enterprises working in New Brunswick. In accordance with the structure of the questionnaire (refer to Appendix A for copies of the questionnaire in French and in English), the current section is divided into nine sub-sections. The first sub-section provides a picture of the music industry as a whole, while subsequent sub-sections deal with particular activities of the music industry, such as singing and performing, managing artists, producing albums, releasing albums, recording albums and distributing albums. Sub-sections dealing with the size of the industry and industry revenues complete the fourth section.

Prior to the presentation of the survey, however, a short word on its administration and the degree of confidence of the results is in order.

During the month of December 2003, a total of 480 questionnaires were sent out to individuals and enterprises across New Brunswick involved in activities such as song writing, performing, managing artists, booking concerts, releasing albums, distributing albums, producing albums, engineering albums, promoting concerts, publishing music and manufacturing musical products.

Of these 480 questionnaires, 345 were sent electronically via e-mail, including 10 that were returned due to incorrect address, and 135 were sent via traditional mail, including 8 that were returned due to incorrect address. Overall, then, 462 invitations were received to which we were able to obtain 92 valid responses. This works out to a response rate of 20%, which is very high given this kind of survey.

Particulars of the survey, including sample sizes, population sizes and the intervals at various confidence levels for artists, professionals and for the industry as a whole are presented in the following table.

Table 1.0
Confidence Intervals at 95%, 90% and 80% According to Sample Characteristics

Characteristic of Sample	n (sample)	N (population)	Intervals (+/-) at Respective Confidence Levels		
			95%	90%	80%
Artists	58	1100	12.6%	10.6%	8.3%
Professionals	34	150	15.1%	12.6%	9.8%
Total Industry	92	1250	9.9%	8.3%	6.5%

The reading of intervals at particular confidence levels is straightforward. For example, given the size of the sample obtained through the survey, all statistics presented that concern the industry as a whole fall within a confidence level of +/- 9.9% at 95% of the time, or +/-8.3% at 90% of the time, or +/-6.5% at 80% of the time. In other words, there is a 95% chance that the particular statistic falls within +/-9.9% of what is indicated, a 90% chance that the particular statistic falls within +/-8.3% of what is indicated, and an 80% chance that the particular statistic falls within +/-6.5% of what is indicated. Note that as the interval is more precise (i.e. smaller), there is less of a probability that the statistic falls within that given interval.

In addition to the various confidence levels of the statistics presented, other factors should be considered when interpreting the results presented. These factors include:

a) *Respondent Bias*

As for all surveys, the respondent bias must be taken into account. Respondent bias occurs when a respondent interprets a particular question in a manner that is not intended by the surveyor, or when the respondent's response does not truly reflect the facts (for example, overstating album sales, or understating revenues).

a) *Small Populations*

As will be evident while reading the results of the survey, an attempt was made to distribute the music industry into various sub-groups, such as geographic location, age, principal activity, etc. This means that depending on the distribution in question, the population size that was being sampled is quite small.

There are two important factors to consider when the population size is small:

- i. *There is a probability that no one from the particular population answered the questionnaire.*

For example, Table 1.6, which presents the principal activity of the music industry according to geographic distribution, indicates that there is nobody in the Edmunston region or in the Acadian Peninsula whose principal activity is performing. Although this table reflects the responses received from the survey, that is not to say that it is 100% certain that there is nobody in these regions whose principal activity is performing. Perhaps there are, but most probably not many; at least, not enough for one individual whose principal activity is performing to respond.

- ii. *The smaller the population the greater there is a margin of error.*

For populations that are very small, and in this particular survey there are many, the intervals at particular confidence levels are large.

For example, with a sample of five respondents in a population of 20, the interval is +/-43.5% at 95% of the time, 36.5% at 90% of the time, and 28.5% at 80% of the time.

It should be emphasized that the factors presented here are the same for *all* surveys of this type are not specific to this one. Particularly in cultural industries at a provincial level, where populations are often very small once they are distributed according to a specific characteristic (such as region, age group, specialty, etc.), the margin of error is greater the more detailed the information one is trying to obtain.

With these factors in mind, those interested in the music industry of New Brunswick should have no problems interpreting the results of the survey. At times, particularly when the survey sample is delineated according to a particular sub-group, the data presented should be used to serve *as a general trend or a strong indicator* of proportions of the actual population.

At other times, when dealing with the population at large (i.e. the whole industry) or with all performers (section 4.2 *Profile of Singers and Performers*) confidence levels are quite high (for

instance, when dealing with revenues), and consequently, the data presented reflects the population accurately.

4.1 The Music Industry

The first sub-section of the survey profiles various elements of the music industry as a whole. These elements include a demographic profile, a classification of respondents according to their primary and secondary activities, and finally an attempt to measure the degree of professional specialisation.

4.1.1 Demographic Profile

In order to establish the demographic profile of the industry, three major factors were considered, including geographic region, age, and number of years experience in the industry as a professional.

Table 1.1 presents the geographic distribution of the music industry in New Brunswick.

Table 1.1
Geographic Distribution of the Music Industry

Region	%
Acadian P.	5.4
Campbelton	2.2
Edmunston	1.1
Fredericton	16.3
Miramichi	3.3
Moncton	52.2
Saint John	16.3
St-Stephens	2.2
Woodstock	1.1
Total	100

Source: EEC Canada, 2003-2004

The following observations can be made:

- Approximately half of the music industry in New Brunswick is based in the Moncton area. While this concentration can be characterised as moderate, it is significant given the fact that the percentage exceeds Moncton's share of the provincial population (according to 2001 statistics, Saint John is the largest city in the province with a population of 69,661; Moncton is second with 61,046 people, and Fredericton is third with a population of 47,560).
- The fact that Moncton's share of music industry professionals exceeds its share of population, leads to the speculation that musicians and music industry professionals from outside Moncton are attracted to the area to pursue their musical interests.
- Fredericton and Saint John are each home to a little over 16% of the population involved in the music industry.

- Close to 85% of the music industry is concentrated in the province's three major urban centres.
- Regions outside the major urban centres are home to approximately 15% of the industry, with 5.4% in the Acadian Peninsula, 3.3% in Miramichi, 2.2% in St-Stephens and Campbellton, and a little over 1% in both Edmunston and Woodstock.

Table 1.2 presents the age distribution of the music industry.

Table 1.2
Age Distribution of the Music Industry (in %)

Age	%
Less than 20	4.3
20-30	28.3
31-40	23.9
41-50	31.5
51-60	8.7
more than 60	3.3
Total	100

Source: EEC Canada, 2003-2004

- There appears to be a good balance of individuals across the various age groups. 28.3% of the population fall between the ages of 20 and 30, 23.9% between the ages of 31 and 40, 31.5% between the ages of 41 and 50 and 12% over 50. However, the proportion of the industry under 20 years old appears low at 4.3%.
- A couple of factors can explain the low percentage of individuals under 20, including the fact that performers under 20, although perhaps very active in the industry, may not have been active very long on a professional level. Hence, such individuals may not have been as aware of the survey as individuals with more experience, or perhaps they were less inclined to respond than would.

Table 1.3 presents the music industry according to years experience at the professional level. From the table, the following observations can be made:

- Close to 73% of the industry has over six years of experience at the professional level. Close to 50% have over 10 years experience.
- Over 27% of the industry has less than 5 years experience.
- The number of years experience expressed by respondents seems to be distributed evenly across all categories. However, there does appear to be a shortage of newcomers (3.3% with less than 1 year, and 9.8% with 1-2 years). However, much like for the case of age distribution, it is quite possible that individuals with less than 2 years experience are not yet on industry lists and hence were not invited to participate in the survey.
- Then again, the data could also reflect a very real problem in the industry, namely that young people have little incentive to pursue a career in music in the province, perhaps due to a lack of opportunities.

Table 1.3
Years Experience of the Music Industry (in %)

Years Experience	%
less than 1	3.3
1-2	9.8
3-5	14.1
6-10	25.0
11-20	22.8
more than 20	25.0
Total	100

Source: EEC Canada, 2003-2004

Table 1.4 presents the geographic distribution of the music industry according to the number of years experience.

- It is interesting to note that almost all of the individuals with less than 5 years experience are located in one of the three major urban centres of Moncton, Saint John and Fredericton.
- Almost all respondents from the regions (outside the three urban centres) have at least six years of industry experience.

Table 1.4
Geographic Distribution of the Music Industry According to Years Experience (in %)

Region	Years Experience						Total
	less than 1	1-2	3-5	6-10	11-20	more than 20	
Acadian P.	0	0	0	13.0	4.8	4.3	5.4
Campbelton	0	0	0	4.3	4.8	0	2.2
Edmunston	0	0	0	4.3	0	0	1.1
Fredericton	33.3	22.2	15.4	8.7	19.0	17.4	16.3
Miramichi	0	0	7.7	4.3	0	4.3	3.3
Moncton	33.3	44.4	61.5	47.8	61.9	47.8	52.2
Saint John	33.3	33.3	15.4	13.0	9.5	17.4	16.3
St-Stephens	0	0	0	4.3	0	4.3	2.2
Woodstock	0	0	0	0	0	4.3	1.1
Total	100	100	100	100	100	100	100

Source: EEC Canada, 2003-2004

The last observation can be explained by the fact that individuals from the regions that are interested in working professionally in music leave for one of the three urban centres to start their careers. However, after a period of approximately 5 years, some of these individuals return to their region, often finding ways to pursue their careers.

- This trend suggests there is an increasing concentration of musical activity in the urban centres. Of course, only future studies will be able to confirm or invalidate this hypothesis.

4.1.2 Principal and Secondary Activities

The following sub-section considers the principal and secondary activities of enterprises and individuals working professionally in the music industry of New Brunswick. To interpret correctly the data that follows, it is important to understand how participants were asked to respond to questions regarding the role(s) they played in the industry.

For more information on principal and secondary activities, including why this approach was opted for in the context of the music industry of New Brunswick, refer to section 2.3.3 *Professions vs. Activities*.

From the start of the survey, respondents were asked to indicate what they considered their principal activity in music and sound recording. Respondents could only choose one principal activity, and not necessarily the one that occupied the majority of their time.

Respondents were then asked to indicate other activities that they provided at the professional level. These other activities are considered secondary activities. Respondents were permitted to select more than one secondary activity, indicating the proportion of time that they allocated to each (including their principal activity). Note that the percentages of time allocated to each activity are proportions of total time allocated to *music-related activities*, and not proportions of total time devoted to all *work-related activities*.

Table 1.5 presents the music industry in New Brunswick according to principal activity. From the table, the following observations can be made:

- Of the 92 people who responded to the survey, not one chose booking concerts, releasing albums (record label), engineering albums or manufacturing albums as their principal activity.
- This last observation is significant. According to the survey, no one in the province is committed to signing performers and planning careers for them.
- In addition, no one in the province is committed to organising concert tours for performers. This fact points to a severe challenge for artists who seek to earn a living, to gain exposure, or to promote a new release through touring.
- Those whose principal activity was performing music⁵ account for 66.8% of respondents. Together with songwriters (21.2%), musical artists account for a combined 88.0% of the population.
- Those whose principal activity involved recording albums (studios) represented 2.5% of the industry.
- Only 1.8% of the population indicated managing artists as their principal activity. This proportion is rather low, particularly if we consider that these individuals do not necessarily

⁵ Throughout the report, the term ‘performers’ will be used to refer to singers and musicians; the term ‘musical artists’ will be used to refer to performers and songwriters; the term ‘other professionals’ or simply ‘professionals’ will be used to refer to all activities other than singing and performing (managing artists, booking concerts, releasing albums, etc.).

manage artists on a full-time basis. This percentage suggests a need in the province for more professionals committed to managing careers.

- Other principal activities include distributing albums (0.1%), producing albums (0.8%), teaching music (1.1%), promoting concerts (1.8%) and publishing music (0.4%).
- 2.9% of respondents involved in music indicated that their principal activity lied outside of the music industry *as defined by this study* (refer to section 1.3.1 *Defining the Music Industry*), such as directing and producing music videos, working in radio, retail, etc.

Table 1.5
Principal Activity of the Music Industry (in %)

Principal Activity	%
Song Writing	21.2
Performing Music	66.8
Managing Artists	1.8
Booking Concerts	0
Releasing Albums	0
Recording Albums	2.5
Distributing Albums	0.1
Producing Albums	0.8
Engineering Albums	0
Sound Technician	0.7
Music Teaching	1.1
Promoting Concerts	1.8
Publishing Music	0.4
Manufacturing Albums	0
Other	2.9
Total	100

Source: EEC Canada, 2003-2004

By considering the data presented in **Table 1.5**, it may be concluded that:

- a) There are plenty of musical artists working in the province;
- b) These artists have little problem-finding the resources and the people qualified to record their musical products⁶;
- c) There are very few people (if any) in the province committed to releasing these products;
- d) There are very few people (if any) in the province committed to booking concerts;
- e) There are very few people in the province that are committed to managing the careers of these artists at a professional level.

⁶ With the assistance of funding opportunities such as the New Brunswick Sound Initiative, administered by the Culture and Sports Secretariat, there appears to be available resources in the province to record these products professionally. At least, it cannot be said that a lack financial resources earmarked for the actual recording of musical products is the greatest factor currently holding back the industry. This subject will be treated at greater length further on in the report.

Table 1.6 presents the principal activities of respondents according to where they are located in the province.

- One hundred percent of respondents whose principal activity was distributing albums (who, in this case, correspond to one distributor) are located in the Acadian Peninsula. The presence of this distributor is without a doubt a great resource for individuals seeking to move their musical products into stores.
- However, it is worth noting that the province's sole distributor specialises in French-language musical recordings, particularly from Acadian artists. This fact points to a potential difficulty for other artists, notably instrumental and English language artists, to obtain distribution from within the province.
- Recording studios are concentrated in the province's three urban centres and Miramichi, with a strong concentration in the Moncton area.
- Concert promoters are concentrated in the Fredericton and Moncton areas. Someone committed to promoting concerts is based in the St-Stephens area.
- Those whose principal activities include song writing and performing are scattered about the province, with strong concentrations in Moncton (56.8% of performers and 57.1% of songwriters), Fredericton (20.5% and 7.1%, respectively), and Saint John (13.6% and 14.3%, respectively).
- The Acadian Peninsula is home to quite a large proportion of songwriters, album producers and sound technicians given its actual size and importance in other categories (14.3%, 50% and 50%, respectively).
- Individuals devoted to managing artists were reported from Moncton (60%) and Saint John (40%) exclusively.

Table 1.6
Principal Activity and Geographic Distribution of the Music Industry (in %)

Principal Activity	Acadian P.	Campbelton	Edmunston	Fredericton	Miramichi	Moncton	Saint John	St-Stephens	Woodstock	Total
Song Writing	14.3	0	7.1	7.1	0	57.1	14.3	0	0	100
Performing Music	0	4.5	0	20.5	2.3	56.8	13.6	2.3	0	100
Managing Artists	0	0	0	0	0	60.0	40.0	0	0	100
Recording Albums	0	0	0	14.3	14.3	42.9	28.6	0	0	100
Distributing Albums	100	0	0	0	0	0	0	0	0	100
Producing Albums	50.0	0	0	50.0	0	0	0	0	0	100
Sound Technician	50.0	0	0	0	0	50.0	0	0	0	100
Music Teaching	0	0	0	33.3	33.3	33.3	0	0	0	100
Promoting Concerts	0	0	0	40.0	0	40.0	0	20.0	0	100
Publishing Music	0	0	0	0	0	0	0	0	100	100
Other	0	0	0	0	0	62.5	37.5	0	0	100
Total	5.4	2.2	1.1	16.3	3.3	52.2	16.3	2.2	1.1	100

Source: EEC Canada, 2003-2004

Table 1.7 presents the principal activities of the music industry according years experience at the professional level. From the table, the following observations can be made:

- Close to two-thirds of respondents whose principal activity is song writing have over 6 years experience in the industry.
- Performers appear well distributed in terms of experience; 25% of respondents with performing as their principal activity are veterans with more than 20 years experience.
- Almost all respondents whose principal activity is managing artists are relative newcomers with only 1-2 years experience.
- All whose principal activity is recording albums claimed at least 6 years experience. The bulk of this group (42.9%) fell in the 6-10 years experience category, corresponding loosely to the time the province (Culture and Sports Secretariat) started encouraging recording studios.

Table 1.7
Principal Activity According to Years Experience of the Music Industry (in %)

Principal Activity	Years Experience						Total
	less than 1	1-2	3-5	6-10	11-20	more than 20	
Song Writing	7.1	7.1	21.4	21.4	35.7	7.1	100
Performing Music	4.5	4.5	18.2	25.0	22.7	25.0	100
Managing Artists	0	80.0	0	0	20.0	0	100
Recording Albums	0	0	0	42.9	28.6	28.6	100
Distributing Albums	0	0	0	100	0	0	100
Producing Albums	0	0	0	50.0	0	50.0	100
Sound Technician	0	50.0	0	0	50.0	0	100
Music Teaching	0	0	0	0	0	100	100
Promoting Concerts	0	20.0	0	40.0	0	40.0	100
Publishing Music	0	0	0	0	0	100	100
Other	0	0	25.0	25.0	25.0	25.0	100
Total	3.3	9.8	14.1	25.0	22.8	25.0	100

Source: EEC Canada, 2003-2004

Table 1.8 presents the primary activity of music industry professionals according to secondary activities (a reminder that respondents could select more than one secondary activity, which explains why the sum of rows and columns are greater than 100%).

The table reads as follows, 85.7% of those who selected song writing as their principal activity selected performing music as one of their secondary activities; 7.1% of those who selected song writing as their principal activity selected managing artists as one of their secondary activities, etc.

The table is particularly interesting because it provides an indication of the versatility demonstrated by music industry professionals in New Brunswick. Of course, the downside to this versatility is that it prohibits individuals from specialising in one particular area⁷.

⁷ Although in many cases individuals choose to provide a range of services, often it is out of necessity that they do so.

After analysing the table, it can be concluded that the traditional boundaries between individual roles that we can expect to observe in a developed music industry, where the performers do the performing, the managers do the managing and the bookers do the booking, does not apply to New Brunswick.

In contrast, the table demonstrates how, faced with a lack of committed, qualified and experienced professionals in the province, individuals find it necessary to do a little bit of everything.

Table 1.8
Secondary Activities of the Music Industry According to Principal Activity (%)

Principal Activity	Secondary Activity															
	Song Writing	Performing Music	Managing Artists	Booking Concerts	Releasing Albums	Recording Albums	Distributing Albums	Producing Albums	Engineering Albums	Sound Technician	Music Teaching	Promoting Concerts	Publishing Music	Manufacturing Albums	Other 1	Other 2
Song Writing	n.a.	85.7	7.1	14.3	14.3	42.9	21.4	21.4	7.1	7.1	7.1	7.1	0	0	7.1	0
Performing Music	59.1	n.a.	13.6	25.0	15.9	43.2	11.4	22.7	9.1	15.9	25.0	11.4	4.5	2.3	0	0
Managing Artists	0	20.0	n.a.	60.0	20.0	20.0	0	0	0	0	0	40.0	0	0	0	0
Booking Concerts	0	0	0	n.a.	0	0	0	0	0	0	0	0	0	0	0	0
Releasing Albums	0	0	0	0	n.a.	0	0	0	0	0	0	0	0	0	0	0
Recording Albums	57.1	57.1	0	0	0	n.a.	0	57.1	85.7	42.9	14.3	0	0	0	0	0
Distributing Albums	0	0	0	0	0	0	n.a.	0	0	0	0	0	0	0	100	0
Producing Albums	0	50.0	50.0	50.0	50.0	50.0	0	n.a.	50.0	0	0	0	50.0	0	0	0
Engineering Albums	0	0	0	0	0	0	0	0	n.a.	0	0	0	0	0	0	0
Sound Technician	50.0	0	0	0	0	50.0	0	0	100	n.a.	0	0	0	0	50.0	0
Music Teaching	0	100	0	0	0	0	0	0	0	0	n.a.	0	0	0	0	0
Promoting Concerts	0	0	20.0	20.0	20.0	0	0	0	0	0	0	n.a.	20.0	0	40.0	40.0
Publishing Music	100	100	0	0	0	0	0	0	0	0	0	0	n.a.	0	0	0
Manufacturing Albums	0	0	0	0	0	0	0	0	0	0	0	0	0	n.a.	0	0
Other	12.5	37.5	12.5	25.0	12.5	0	0	12.5	0	0	25.0	12.5	0	0	75.0	12.5
Total	51.1	75.0	16.3	21.7	14.1	38.0	9.8	21.7	15.2	14.1	19.6	14.1	5.4	1.1	12.0	3.3

Source: EEC Canada, 2003-2004

Some noteworthy observations include:

- 85.7% of songwriters and 100% of music teachers perform music as one of their secondary activities.
- A little more than 40% of those who indicated song writing and performing music as their principal activity selected recording albums as one of their secondary activities.
- Sixty percent of artists' managers are also involved in booking concerts.

- Twenty-five percent of performers teach music as a sideline.
- Individuals principally involved in recording albums also tend to be involved in a wide range of secondary activities, including: song writing, performing, producing and engineering music in addition to working as a sound technician.
- Although no respondents indicated releasing albums as a principal activity, to varying degrees, songwriters, performers, artist managers, producers and concert promoters all indicated an involvement in the activity.

Finally, **Table 1.9** presents the extent which musical artists and other professionals are able to intervene on a wide range of activities.

The following observations can be made:

- 38.2% of professionals perform music on a professional level. Another 20.6% generate revenues writing music.
- Despite the fact that no one claimed booking concerts as a principal activity, 22.4% of musical artists and 20.6% of other professionals do some booking.
- Releasing albums is more common amongst musical artists (as is booking concerts) than it is amongst other professionals, 15.5% and 11.8%, respectively.
- 13% of musical artists distribute albums, compared to 2.9% of other professionals. This means that other than the province’s unique distributor, all other distribution is taken care of by songwriters and performers.

Table 1.9
Extent of Activities Provided (%)

Activities	Songwriters and Performers	Other Professionals
Song Writing	69.0	20.6
Performing Music	96.6	38.2
Managing Artists	12.1	23.5
Booking Concerts	22.4	20.6
Releasing Albums	15.5	11.8
Recording Albums	43.1	29.4
Distributing Albums	13.8	2.9
Producing Albums	22.4	20.6
Engineering Albums	8.6	26.5
Sound Technician	13.8	14.7
Music Teaching	20.7	17.6
Promoting Concerts	10.3	20.6
Publishing Music	3.4	8.8
Manufacturing Albums	1.7	0.0

Source: EEC Canada, 2003-2004

4.1.3 Degree of Specialisation

When considering the level of maturity of a given industry, its relative degree of specialisation can be a useful indicator to consider. One would expect that specialisation increases the more an industry grows. This is because the more developed an industry; the more players are called upon to deliver a particular service for which they have developed an expertise. In contrast, the less developed an industry, the more individual players must perform several functions to compensate for the lack of available expertise. This prevents players from concentrating on one area, and increasing their skills and knowledge as well as developing a greater network base.

In order to determine the degree of specialisation, an index was calculated which considers the number of secondary activities players participate in vis-à-vis their primary activity. The reading of the index is straightforward, the higher the rating (with a maximum of 100) the greater the degree of specialisation; the lower the rating, the less specialised the player, indicating their tendency to operate in a wide range of activities within the music industry.

Table 1.9 provides specialisation indexes for the music industry according to the principal activity of the respondent. We could observe the following:

- With an index rating of 70, the highest level of specialisation appears to be with concert promoters. Indeed, this group displayed little propensity for secondary activities (refer also to **Table 1.8**).

Table 1.9
Degree of Specialisation of Music Industry According to Principal Activity

Principal Activity	Specialisation Index
Song Writing	38
Performing Music	44
Managing Artists	59
Booking Concerts	n.a.
Releasing Albums	n.a.
Recording Albums	30
Distributing Albums	50
Producing Albums	25
Engineering Albums	n.a.
Sound Technician	29
Music Teaching	50
Promoting Concerts	70
Publishing Music	33
Manufacturing Albums	n.a.
Total	44

Source: EEC Canada, 2003-2004

- Among the least specialised groups are those associated with activities related by their need for knowledge of the more technical aspects of sound recording and reproduction, such as: recording albums (30), producing albums (25) and sound technician (29).

→ Individuals involved in most other activities demonstrated moderate to low specialisation rates, including songwriters (38), performers (44), music teachers (50) and publishers (33). For their part, artists' managers indicated a slightly higher degree of specialisation (59).

Table 1.10 calculates the same index according to geographic location. To a certain extent, it can be observed that specialisation increases (that is to say, individuals are more specialised) in urban areas.

→ Urban centres such as Saint John (60), Fredericton (50) and Moncton (39) appear to have higher indexes than smaller regions such as the Acadian Peninsula (32), Edmunston (20), Woodstock (33) and Campbelton (38).

→ Exceptions to the rule include the regions of Miramichi and St-Stephens (both with 57).

Table 1.10
Degree of Specialisation of Music Industry According to Geographic Distribution

Geographic Distribution	Specialisation Index
Acadian P.	32
Campbelton	38
Edmunston	20
Fredericton	50
Miramichi	57
Moncton	39
Saint John	60
St-Stephens	57
Woodstock	33
Total	44

Source: EEC Canada, 2003-2004

4.2 Profile of Singers and Performers

The previous section profiled various elements of the music industry as a whole. The present section deals exclusively with individuals for whom performing is either a primary or a secondary activity.

The profile covers the following elements: a demographic profile, a classification of respondents according to their primary and secondary activities, a measure of professional specialisation, training, classifications of performers according to the type of performance, whether or not they are signed to a label, employ a manager, touring activities as well as recordings and unit sales.

4.2.1 Demographic Profile

Table 2.1 presents the geographic distribution of performers in New Brunswick. The following observations can be made:

- The strongest concentration of performers in the province can be found in the Moncton region, which is home to 55.1%.
- The other two urban centres, namely Fredericton (17.4%) and Saint John (13%), combine to house a little over 30% of the provinces performers. Together, the three urban areas account for over 85% of all performers.
- Outside urban areas, performers can be found across the province in the following proportions: Miramichi (4.3%), the Campbelton area and the Acadian Peninsula (2.9% each), as well as the Edmunston, St-Stephens and Woodstock areas (1.4% each).

Table 2.1
Geographic Distribution of Performers

Region	%
Acadian P.	2.9
Campbelton	2.9
Edmunston	1.4
Fredericton	17.4
Miramichi	4.3
Moncton	55.1
Saint John	13.0
St-Stephens	1.4
Woodstock	1.4
Total	100

Source: EEC Canada, 2003-2004

Table 2.2 presents the age distribution of performers.

- As for the music industry as a whole, there appears a good balance of individuals across the various age groups, with 31.9% of performers between the ages of 20 and 30, 21.7% between the ages of 31 and 40, 24.6% between the ages of 41 and 50 and 15.9% over 50.

→ The proportion of the industry under 20 years old appears low at 5.8%.

Table 2.2
Age Distribution of Singers/Performers

Age	%
less than 20	5.8
20-30	31.9
31-40	21.7
41-50	24.6
51-60	11.6
more than 60	4.3
Total	100

Source: EEC Canada, 2003-2004

Table 2.3 presents the performers in terms of years experience. The following observations can be made:

- 72.5% of the music industry has over six years of experience, including close to 50% with over 10 years experience.
- 27.5% of the industry has less than 5 years experience.
- As for the industry as a whole, the proportion of respondents with less than 1-year experience appears low. It is possible that individuals with less than 1-year experience are not yet on industry lists and hence were not invited to respond to the survey. It could also be possible that there are few individuals with less than 1-year experience. Of course, the explanation could involve a combination of the two.

Table 2.3
Years Experience of Singers/Performers

Years	Number	%
less than 1	3	4.3
1-2	4	5.8
3-5	12	17.4
6-10	16	23.2
11-20	16	23.2
more than 20	18	26.1
Total	69	100

Source: EEC Canada, 2003-2004

4.2.2 Principal and Secondary Activities

Table 2.4 presents the percentage breakdown of individuals in the province who include performing as either their primary or secondary activity according to their primary activity. From the table, the following can be observed:

- The large majority of performers in the province (63.8%) selected performing music as their primary activity.
- Song writing constituted the second most important group (17.4%) as primary activities of performers.
- Other activities included recording albums (5.8%) and teaching music (4.3), while managing artists, producing albums, and publishing music each represented a mere 1.4% of the population.

Table 2.4
Primary Activity of Singers/Performers

Primary Activity	Table %
Song Writing	17.4
Performing Music	63.8
Managing Artists	1.4
Booking Concerts	0
Releasing Albums	0
Recording Albums	5.8
Distributing Albums	0
Producing Albums	1.4
Engineering Albums	0
Sound Technician	0
Music Teaching	4.3
Promoting Concerts	0
Publishing Music	1.4
Manufacturing Albums	0
Other	4.3
Total	100

Source: EEC Canada, 2003-2004

Table 2.5 presents the popularity of secondary activities of performers in the province. The following observations can be made:

- By far, the most common secondary activity is song writing, with 62.3% of performers engaged in the activity. Of course, the link between both activities can be expected.
- Perhaps more surprising is the fact that 40% of performers indicated recording albums as one of their secondary activities. The high incidence of recording amongst performers can be explained by its ever-increasing accessibility due to technological innovations. Indeed, a musician today requires little else than a good microphone and a home computer to record, arrange and mix good quality musical products (good quality should not be confused with professional quality).

→ 11.6% of performers indicated performing as their exclusive activity in the music industry.

Table 2.5
Secondary Activities of Singers/Performers

Secondary Activity	% of Performers
Song Writing	62.3
Performing Exclusively	11.6
Managing Artists	13.0
Booking Concerts	21.7
Releasing Albums	14.5
Recording Albums	40.6
Distributing Albums	11.6
Producing Albums	23.2
Engineering Albums	11.6
Sound Technician	13.0
Music Teaching	23.2
Promoting Concerts	11.6
Publishing Music	4.3
Manufacturing Albums	1.4

Source: EEC Canada, 2003-2004

Table 2.6 provides a more detailed picture of the secondary activities of performers in the industry. The most noteworthy observations include:

- 13.6% for whom performing is a principal activity claimed managing artists as one of their secondary activities. The only other professional category engaged in managing artists were songwriters, 8.3% of whom claimed to do so at a professional level.
- All managers involved in performing indicated booking and concert promotion as secondary activities.
- 59.1% of performers indicated song writing as a secondary activity. Other secondary activities popular among those for whom performing constituted a primary activity include booking concerts (25%), recording albums (43.2%), teaching music (25%), producing albums (22.7%) and distributing albums (11.4%).
- Another profession that demonstrates a wide range of secondary activities is sound recording. Indeed, 75% of sound recording professionals indicated song writing as well as engineering and producing albums as secondary activities. fifty percent of sound recording professionals indicated working as a sound technician as well.

Table 2.6
Secondary Activities of Performers According to Primary Activity (in %)

Primary Activity	Secondary Activities														
	Song Writing	Performing Music	Managing Artists	Booking Concerts	Releasing Albums	Recording Albums	Distributing Albums	Producing Albums	Engineering Albums	Sound Technician	Music Teaching	Promoting Concerts	Publishing Music	Manufacturing Albums	Other
Song Writing	n.a.	100	8.3	16.7	16.7	41.7	25.0	16.7	0	0	8.3	8.3	0	0	8.3
Performing Music	59.1	n.a.	13.6	25.0	15.9	43.2	11.4	22.7	9.1	15.9	25.0	11.4	4.5	2.3	0
Managing Artists	0	100	n.a.	100	0	0	0	0	0	0	0	100	0	0	0
Booking Concerts	0	0	0	n.a.	0	0	0	0	0	0	0	0	0	0	0
Releasing Albums	0	0	0	0	n.a.	0	0	0	0	0	0	0	0	0	0
Recording Albums	75.0	100	0	0	0	n.a.	0	75.0	75.0	50.0	0	0	0	0	0
Distributing Albums	0	0	0	0	0	0	n.a.	0	0	0	0	0	0	0	0
Producing Albums	0	100	0	0	0	0	0	n.a.	100	0	0	0	0	0	0
Engineering Albums	0	0	0	0	0	0	0	0	n.a.	0	0	0	0	0	0
Sound Technician	0	0	0	0	0	0	0	0	0	n.a.	0	0	0	0	0
Music Teaching	0	100	0	0	0	0	0	0	0	0	n.a.	0	0	0	0
Promoting Concerts	0	0	0	0	0	0	0	0	0	0	0	n.a.	0	0	0
Publishing Music	100	100	0	0	0	0	0	0	0	0	0	0	n.a.	0	0
Manufacturing Albums	0	0	0	0	0	0	0	0	0	0	0	0	0	n.a.	0
Total	62.3	100	13.0	21.7	14.5	40.6	11.6	23.2	11.6	13.0	23.2	11.6	4.3	1.4	2.9

Source: EEC Canada, 2003-2004

4.2.3 Degree of Specialisation

As explained in section 4.1.3, a specialisation index was calculated in order to measure the extent which industry professionals are specialised in their stated primary activity. This index considers the number of secondary activities players participate in vis-à-vis their primary activity. The higher the rating (with a maximum of 100) the greater the specialisation, the lower the rating, the less specialised the player, indicating their tendency to operate simultaneously in a wide range of activities within the music industry.

Table 2.7 provides specialisation indexes for the performers of the music industry according to the principal activity of the respondent. The following observations can be made:

- The highest level of specialisation, with an index rating of only 50, are music teachers
- Those who selected performing as their principal activity are the second most specialised group with an index rating of 44. Despite holding the second highest rating, the index suggests that performers tend to extend their efforts over a wide range of activities. Ultimately, this prevents performers from being able to concentrate on developing their talent fully.

- Artist managers indicated very low levels of specialisation (25), suggesting their need to provide a wide range of services to their clients.
- Another activity demonstrating low levels of specialisation is recording albums (23). As has been discussed earlier, given the general lack of qualified and committed infrastructure, those involved with recording artists are also in a position to provide clients with a wide range of services.
- Taken as a whole, all individuals involved in performing music demonstrated relatively low levels of specialisation (40). This rating was somewhat lower than the one recorded for the industry as a whole (44).

Table 2.7
Degree of Specialisation of Performers According to Primary Activity

Principal Activity	Specialisation Index
Song Writing	34
Performing Music	44
Managing Artists	25
Booking Concerts	n.a.
Releasing Albums	n.a.
Recording Albums	23
Distributing Albums	n.a.
Producing Albums	33
Engineering Albums	n.a.
Sound Technician	n.a.
Music Teaching	50
Promoting Concerts	n.a.
Publishing Music	33
Manufacturing Albums	n.a.
Total	40

Source: EEC Canada, 2003-2004

The specialisation index was calculated according to geographic origin of the performer. The results are presented below in **Table 2.8**. It is particularly interesting to note that:

- As was the case for the complete industry (refer to **Table 1.10**), higher degrees of specialisation were recorded in urban areas with Miramichi leading the way (57), followed by Saint John (55) and Fredericton (42). Moncton, however, was an exception to the rule with a rating of only 37, corresponding to 3 points lower than the provincial average.
- Indexes for regions such as Campbelton (38), the Acadian Peninsula (33), Woodstock (33) are moderate to low, while indexes for Edmunston (20) and St-Stephens (14) are very low, indicating that performers in those areas are involved in many simultaneous activities.
- The low levels for specialisation of performers outside urban centres can be understood as the need for such performers to take on many professional roles given the lack of committed and qualified infrastructure. This phenomenon could be expected.

- The fact that levels are also low in the urban areas reflects a greater problem province-wide and the need to incite individuals to enter such fields as well as assist them in acquiring the necessary training and expertise.

Table 2.8
Degree of Specialisation of Performers According to Geographic Distribution

Geographic Distribution	Specialisation Index
Acadian P.	33
Campbelton	38
Edmunston	20
Fredericton	42
Miramichi	57
Moncton	37
Saint John	55
St-Stephens	14
Woodstock	33
Total	40

Source: EEC Canada, 2003-2004

4.2.4 Training

Tables 2.9 to 2.11 indicate the level of musical training received by performers of the music industry in New Brunswick. **Table 2.9** presents the group as a whole, while **Tables 2.10** and **2.11** distribute the population according to their geographic distribution and number of years experience, respectively. It should be noted that apart from performers, who indicated no musical training (self-taught), respondents could select more than one response – which explains why totals often add up to more than 100%.

From the tables, we can observe the following:

- The large majority (76.8%) of the performers in the province received no training.
- Among the remaining 23.2% who did receive musical training, the majority learned in a private music school (26.1%), with approximately half that proportion learning music at the primary (14.5%), secondary (13%) or post-secondary (13%) school levels.

Table 2.9
Musical Training of Performers

Level	Table %
Self-Taught	76.8
Primary School	14.5
Secondary School	13.0
Post-Secondary School	13.0
Private Music School	26.1

Source: EEC Canada, 2003-2004

- Outside the three urban centres of Moncton, Fredericton and Saint John, performers received no musical training, with the exception of Miramichi, where two-thirds of the performers indicated attending a private music school
- Training at the primary, secondary and post-secondary levels in the Moncton, Fredericton and Saint John areas were minimal among performers with respondents claiming between 8.3% (primary school in Fredericton) and 21.1% (primary school in Moncton).

Table 2.10
Musical Training of Performers and Geographic Distribution

Level	Acadian P.	Campbelton	Edmunston	Fredericton	Miramichi	Moncton	Saint John	St-Stephens	Woodstock
Self Taught	100	100	100	83.3	33.3	76.3	66.7	100	100
Primary School	0	0	0	8.3	0	21.1	11.1	0	0
Secondary School	0	0	0	16.7	0	15.8	11.1	0	0
Post-Secondary School	0	0	0	16.7	0	15.8	11.1	0	0
Private Music School	0	0	0	33.3	66.7	23.7	33.3	0	0

Source: EEC Canada, 2003-2004

- The proportion of performers who receive musical training increases amongst those with more experience in the industry. Indeed, performers with 11-20 years experience are more likely to have received musical training at the primary, secondary and post-secondary school levels than any other group of performers.
- Such low levels of musical training received by professional performers, if representative of the province as a whole, suggests very low levels of musical training at the primary and secondary school levels in the province.

Table 2.11
Musical Training of Performers and Years Experience

Level	less than 1	1-2	3-5	6-10	11-20	more than 20
Self Taught	100	100	83.3	75.0	68.8	72.2
Primary School	0	25.0	0	6.3	31.3	16.7
Secondary School	0	0	0	6.3	12.5	33.3
Post-Secondary School	0	0	0	12.5	31.3	11.1
Private Music School	0	25.0	33.3	31.3	12.5	33.3

Source: EEC Canada, 2003-2004

4.2.5 Types of Performers

The following tables distribute performers according to the type of performance. Respondents were asked to specify their musical act (whether they perform solo or as a duo/group), the language of their performance, as well as musical genre.

Table 2.12 presents performers according to their musical act. Respondents were free to select solo, duo/group, or both, depending on their how they perform professionally. The table indicates that the majority of performers tend to pursue more than one musical career.

- 47.4% of respondents indicated that they worked professionally as a solo artist as well as part of a duo/group.
- 29.8% of respondents pursue their musical careers as part of a duo/band, while 22.8% exclusively perform solo.

Table 2.12
Musical Act of Performers (%)

Performs as...	%
...solo only	22.8
...duo/group only	29.8
...solo and duo/group	47.4
Total	100

Source: EEC Canada, 2003-2004

Table 2.13 presents the language of performance of solo and duo/group performers. The following can be observed:

- The majority of all performers performed in English. Indeed, 88.4% of all duo/groups indicated that they performed in English. The incidence for solo performers was 75%.
- About a third of performers indicated their performance was in French. The incidence was higher for duo/group performers (34.9%) than it was for solo performers (30%).
- A little less than a third of performers (30% for duo/groups and 27.5% of solo acts) performed instrumental music.
- Approximately 5% of performers performed in languages other than in French and English.

Table 2.13
Language of Performance According to Musical Act (%)

	Language of Solo Performance			
	French	English	Other	Instrumental
Solo	30.0	75.0	5.0	27.5
Duo/Group	34.9	88.4	4.7	30.2

Source: EEC Canada, 2003-2004

Finally, **Table 2.14** presents the musical genre of performers according to their musical act.

- Amongst solo performers, the most popular musical genre is pop (pop, rock, alternative, hard & rock) with 32.5% of the solo population. Roots (folk, blues, jazz & traditional) follow this group closely with 30%. The other important group is country music (20%), while classical accounted for 12.5% and world music and gospel/Christian music accounted for 2.5% each.
- Amongst respondents who indicated performing as a duo/group, the most popular musical genres were roots (45.5%) and pop (34.1%), followed more distantly by country (11.4%) and world music and classical (4.5% each).

Table 2.14
Musical Genre of Solo According to Musical Act (%)

	Musical Genre						Total
	Pop, Rock, Alternative, Hard & Rock	World Music	Country	Gospel, Christian	Roots (Folk, Blues, Jazz & Traditional)	Classical	
Solo	32.5	2.5	20.0	2.5	30.0	12.5	100
Duo/Group	34.1	4.5	11.4	0	45.5	4.5	100

Source: EEC Canada, 2003-2004

4.2.6 Performers Signed to a Label

Performers were asked to indicate whether they were currently signed to a label. It should be specified that the survey asked performers only to respond “yes” if they were not stakeholders of the label in question. The results to the question as well as cross-tabulations with other questions are presented in the following tables.

Table 2.15 indicates the proportion of performers currently signed to a label according to the type of musical act. The following observations can be made:

- None of the musicians who responded performing exclusively solo was currently signed to a label.
- Out of those that perform exclusively as duo/groups performers, close to a third of respondents (29.4) indicated currently being signed to a label. This category represented the largest category of musicians signed to a label.
- Of those who pursue a solo and a duo/group career, 7.4% are currently signed to a record label.

Table 2.15
Signed to Label According to Musical Act

Type of Performance	Currently Signed		
	Yes	No	Total
Solo Only	0	100	100
Duo/Group Only	29.4	70.6	100
Solo and Duo/Group	7.4	92.6	100
Total	12.3	87.7	100

Source: EEC Canada, 2003-2004

Tables 2.16a and 2.16b indicate the proportion of performers currently signed to a label according to the language of performance (**Table 2.16a** for solo performers and **Table 2.16b** for duo/group performers⁸). From the tables, we can observe the following:

⁸ Note that for these tables, as well as all other tables that present performers in two separate groups (solo and duo/group), artists who pursue both solo and duo/group careers have been considered as two separate individuals – one as a solo performer and one as a member of a duo/group. In the survey, variables related to a solo career have been compiled separately from variable related to a duo/group career, and as such, no double counting has occurred.

- None of the respondents included solo French-language performers who were signed to a label. However, 26.7% of duo/group French-language performers indicated that they were signed to a label.
- English-language solo performers were slightly more likely to be signed to a label than their French-language counterpart was. Indeed, 6.7% of solo English -language performers indicated that they were signed to a label. The same statistic was 18.4% for duo/group performers, which represented a lower proportion than French-language dup/group performers.
- The highest proportion of solo performers that were signed to a label belongs to instrumental performers with 9.1%. Of the instrumental performers who performed in a duo/group, 15.4% of them indicated that they were currently signed to a label.
- Overall, duo/group performers were approximately three times more likely to be signed to a record label than solo performers (16.3% and 5.0%, respectively).

Table 2.16a
Solo Performers Signed to Label According to Language of Performance

Solo	Performer is currently signed		
	Yes	No	Total
French	0	100	100
English	6.7	93.3	100
Other	0	100	100
Instrumental	9.1	90.9	100
Total	5.0	95.0	100

Source: EEC Canada, 2003-2004

Table 2.16b
Duo/Group Performers Signed to Label According to Language of Performance

Duo/Group	Performer is currently signed		
	Yes	No	Total
French	26.7	73.3	100
English	18.4	81.6	100
Other	0	100	100
Instrumental	15.4	84.6	100
Total	16.3	83.7	100

Source: EEC Canada, 2003-2004

Table 2.17 presents the proportion of performers currently signed to a label according to the geographic location.

Table 2.17
Performers Signed to Label According to Geographic Location

Geo	Solo Performers Currently Signed			Duo/Group Performers Currently Signed		
	Yes	No	Total	Yes	No	Total
Acadian P.	0	100	100	0	100	100
Campbelton	0	0	0	0	0	0
Edmunston	0	0	0	0	0	0
Fredericton	0	100	100	0	100	100
Miramichi	0	0	0	0	0	0
Moncton	5.3	94.7	100	10.5	89.5	100
Saint John	25.0	75.0	100	0	100.0	100
St-Stephens	0	0	0	0	0	0
Woodstock	0	0	0	0	0	0
Total	7.4	92.6	100	7.4	92.6	100

Source: EEC Canada, 2003-2004

4.2.7 Performers and Managers

Artists' managers are committed to promoting and advancing the interests and careers individual artists or duo/groups. Good management can often make the difference in whether a performer will reach their creative and commercial potential. The following sub-section focuses on the use of dedicated managers by New Brunswick performers.

Table 2.18 indicates the proportion of performers who employ a manager according to their music act. We can note that:

- Solo performers were most likely (30.8%) to employ the services of a professional manager.
- 22.2% of performers who performed solo as well as in a duo/group employed the services of a manager.
- Only 17.6% of duo/group performers worked with professional management.
- By far (77.2%), the majority of professional performers in the province do not employ the services of a manager.
- This means that artists wishing to further their careers must take time and effort away from the more creative aspects of their profession and attribute them to the business aspects, such as planning, promotion and organisation, of their careers. Although an artist may choose to do so (in order to control all aspects of their careers), most are forced into this role due to the lack of professional managers capable and willing to take on this very important task.

Table 2.18
Performers Who Employ A Manager According to Musical Act (%)

Type of Performance	Employ a Manager		
	Yes	No	Total
Solo Only	30.8	69.2	100
Duo/Group Only	17.6	82.4	100
Solo and Duo/Group	22.2	77.8	100
Total	22.8	77.2	100

Source: EEC Canada, 2003-2004

Table 2.19 indicates the proportion of performers who employ a manager according to the language of their performance. The following observations can be made:

- By far, the largest proportions of performers who employ a professional manager were duo/groups that performed in French. Indeed, 46.7% of this population employ a manager, compared to only 18.4% for English-language performers and 15.4% for instrumental performers.
- The proportions were more evenly distributed in the case of solo performers. One-third of French-language performers and 30% of English-language performers employed a manager, compared to 18.2% in the case of instrumental solo performers.
- Overall, 20.9% of duo/groups in the province indicated employing the services of a professional manager, compared to 25% for solo performers.

Table 2.19
Solo Performers Who Employ A Manager According to Language of Performance (%)

Language of Performance	Acts that employ a manager	
	Solo	Duo/group
French	33.3%	46.7%
English	30.0%	18.4%
Instrumental	18.2%	15.4%
Total	25.0%	20.9%

Source: EEC Canada, 2003-2004

4.2.8 Performers Signed to A Label and Employing A Manager

The following two tables are of particular interest as they consider the relationship between employing a manager and being signed to a label.

Table 2.20a presents the relationship between employing a manager and being signed to a label for solo performers. The following observations can be made:

- 2.6% of solo performers concurrently employ a manager and are signed to a label.
- 71.1% of performers do not employ a manager and are not signed to a label.

- 50% of those who are signed to a label employ a manager. Performers who are not signed to a label are less likely to employ a manager (75%).
- Over 90% of those who employ a manager are not currently signed. Although this proportion is high, performers who do employ a manager are less likely to be signed than those who do not (9.9% vs. 3.5%, respectively).

Table 2.20a
Solo Performers Who Employ A Manager and Currently Signed to a Label (%)

Currently Signed	Solo Performers Who Employ a Manager		
	Yes	No	Total
Yes	2.6	2.6	5.2
No	23.7	71.1	94.8
Total	26.3	73.7	100

Currently Signed	Solo Performers Who Employ a Manager		
	Yes	No	Total
Yes	50.0	50.0	100
No	25.0	75.0	100
Total	26.3	73.7	100

Currently Signed	Solo Performers Who Employ a Manager		
	Yes	No	Total
Yes	9.9	3.5	5.2
No	90.1	96.5	94.8
Total	100	100	100

Source: EEC Canada, 2003-2004

Table 2.20b presents the relationship between employing a manager and being signed to a label for duo/group performers. The following observations can be made:

- 12.2% of duo/group performers employ a manager and are currently signed to a label (compared to 2.6% for solo performers).
- 73.2% of duo/group performers do not employ a manager and are not signed to a label (virtually the same for solo performers).
- 71.3% of those who are signed to a label employ a manager. Performers who are not signed to a label are less likely to employ a manager (88.3%).
- 55.7% of those who employ a manager are currently signed. Performers who do not employ a manager are much less likely to be currently signed (6.3% vs. 93.7%).

Table 2.20b
Duo/Group Performers Who Employ A Manager and Currently Signed to a Label

Currently Signed	Duo/Group Performers Who Employ a Manager		
	Yes	No	Total
Yes	12.2	4.9	17.1
No	9.7	73.2	82.9
Total	21.9	78.1	100

Currently Signed	Duo/Group Performers Who Employ a Manager		
	Yes	No	Total
Yes	71.3	28.7	100
No	11.7	88.3	100
Total	21.9	78.1	100

Currently Signed	Duo/Group Performers Who Employ a Manager		
	Yes	No	Total
Yes	55.7	6.3	17.1
No	44.3	93.7	82.9
Total	100	100	100

Source: EEC Canada, 2003-2004

4.2.9 Previous Releases

The following sub-section examines the extent New Brunswick performers have previously released their musical recordings.

Table 2.21 illustrates that 61.5% of solo performers have indicated having a previous release. This proportion is substantially higher than for duo/group performers, 46.3% of whom indicated having a previous release.

Table 2.21
Performers With A Previous Release (%)

	Have Previous Release		Total
	Yes	No	
Solo	61.5	38.5	100
Duo/Group	46.3	53.7	100

Source: EEC Canada, 2003-2004

Table 2.22 indicates the proportion of performers with previous releases according to musical genre.

- All of the solo gospel/Christian music performers surveyed indicated having a previous release; none of the duo/group performers in the same musical genre indicated having one.
- 87.5% of solo country performers indicated having a previous release, compared to only 25% of duo/group performers.

- Practically the same proportion of solo and duo/group performers in the roots category have had previous releases (66.7% and 63.2%, respectively).
- Half of solo pop, rock, alternative and hard rock performers had a previous release, compared to 35.7% of duo/group performers.
- 40% of solo classical performers had a previous release.

Table 2.22
Performers With A Previous Release and Musical Genre (%)

Musical Genre	% with a previous release	
	Solo	Duo/Group
Pop, Rock, Alternative, Hard Rock	50.0	35.7
World Music	0	50.0
Country	87.5	25.0
Gospel/Christian	100	0
Roots (Folk, Blues, Jazz & Traditional)	66.7	63.2
Classical	40.0	0
Total	61.5	46.3

Source: EEC Canada, 2003-2004

Table 2.23 presents the proportion of performers with a previous release according to the language of their performance.

- It is interesting to note that French-language duo/group performers have a higher probability of having a previous release (76.9%) than their solo counterpart (58.3), whereas the reverse is true for English-language performers 51.4% and 65.5%, respectively).
- Approximately twice as many solo instrumental performers have a previous release than do duo/group instrumental performers (70% and 38.5%, respectively).

Table 2.23
Performers With A Previous Release and Language of Performance (%)

Language of performance	% with a previous release	
	Solo	Duo/Group
French	58.3	76.9
English	65.5	51.4
Instrumental	70.0	38.5
Total	61.5	46.3

Source: EEC Canada, 2003-2004

Table 2.24 presents the proportion of performers with a previous release according to whether they are currently signed to a label.

- It is not surprising that 100% of solo performers signed to a label have a previous release. In contrast, close to 30% of duo/group performers signed to a label have not yet released any albums.

- There is a greater proportion of solo performers who are not signed to a label who have a previous release than their duo/group counterpart (63.9% and 45.2%, respectively).

Table 2.24
Performers With Previous Release and Currently Signed to a Label (%)

Signed with a label	% with a previous release	
	Solo	Duo/Group
Yes	100	71.4
No	63.9	45.2
Total	61.5	46.3

Source: EEC Canada, 2003-2004

Finally, **Table 2.25** presents the proportion of performers with a previous release according to whether they employ a manager.

- All of the solo performers who employ the services of a professional manager indicated having a previous release. Less than two-thirds of duo/group performers with a manager indicated having a previous release.
- Of those who do not employ a manager, approximately half indicated that they had a previous release. The proportion was slightly higher for solo performers than for duo/group performers (51.9% and 46.7%, respectively).

Table 2.25
Performers With Previous Release and Employing a Manager (%)

Employ a manager	% with a previous release	
	Solo	Duo/Group
Yes	100	62.5
No	51.9	46.7
Total	61.5	46.3

Source: EEC Canada, 2003-2004

4.2.10 Album Sales

The following sub-section is dedicated to album sales as they were reported by performers who have had previous releases. In many of the tables that follow, average album sales (the average unit sales *per* album release) as well as minimum and maximum unit sales indicated by respondents are provided.

Table 2.26 presents average album sales of performers in New Brunswick according to the type of performance. The following observations can be made:

- Performers who perform exclusively as part of a duo/group indicated very comparable average album sales (777 units) that those who perform exclusively solo (875 units). In contrast, those who perform both solo and as a duo/group recorded album sales twice as high (1,720 units as a solo performer and 1,972 units as part of a duo/group for a combined 3,692 units).

- The range of album sales in the industry appears moderate. Minimum unit sales ranged from 100 to 300 units, while the maximum number of unit sales for single releases ranged from 1,625 to 5,000 units.
- The range between minimum and maximum album sales indicated moderate to high levels of risk associated with releasing musical products. Of course, this risk is endemic to the music industry at large, and does not exclusively characterise the New Brunswick industry. However, given the general lack of industry infrastructure in New Brunswick, as the low average unit sales volumes indicate, the risk is most probably higher in New Brunswick than in many other areas in Canada.

Table 2.26
Average Album Sales According to Musical Act

Musical Act	... as a solo performer			...as a duo/group performer		
	Min.	Max.	Avr.	Min.	Max.	Avr.
Solo Only	120	2,500	875	n.a.	n.a.	n.a.
Duo/Group Only	n.a.	n.a.	n.a.	100	1,625	777
Solo and Duo/Group	300	5,000	1,720	100	4,000	1,972

Source: EEC Canada, 2003-2004

Table 2.27 presents average album sales of performers in New Brunswick according to the language of performance. We can observe the following:

- Average album sales for all categories range from 1,250 units (French-language solo performers) to 1,965 units (French-language duo/group performers).
- In between this range, we find, in increasing order, duo/group instrumental performers (1,263 units), English language duo/group and solo performers (1,363 and 1,425 units, respectively) and solo instrumental performers (1,595 units).
- It can be noted that the highest minimum unit sales recorded by respondents belonged to instrumental performers (both solo and as a duo/group). Indeed, with minimum sales of 800 units and 900 units, respectively, the risk associated with releasing albums in that musical genre appears to be lower than the others are.

Table 2.27
Average Album Sales According to Language

Language	... as a solo performer			...as a duo/group performer		
	Min.	Max.	Avr.	Min.	Max.	Avr.
French	183	3,333	1,250	400	4,000	1,965
English	120	5,000	1,425	100	4,000	1,363
Instrumental	800	3,000	1,595	900	1,625	1,263

Source: EEC Canada, 2003-2004

Table 2.28 presents average album sales of performers in New Brunswick according to musical genre.

- As indicated by survey respondents, average album sales for all musical genres, with the exception of duo/group country and gospel/Christian music performers, were very comparable.
- The average number of album sales for all categories ranged between 1,018 units for duo/group pop music, 1,346 units for duo/group roots music, 1,353 units for solo country music, 1,469 units for solo roots music, and 1,533 units for solo classical performers.
- One duo/group country music performers indicated album sales of 3,333.

Table 2.28
Album Sales According to Musical Genre

Musical Genre	... as a solo performer			...as a duo/group performer		
	Min.	Max.	Avr.	Min.	Max.	Avr.
Pop/Rock/Alternative/Hard Rock	300	5,000	1,583	120	2,000	1,018
World Music	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Country	183	3,333	1,353	3,333	3,333	3,333
Gospel/Christian	120	120	120	n.a.	n.a.	n.a.
Roots (Folk, Blues, Jazz & Traditional)	350	3,000	1,469	100	4,000	1,346
Classical	817	2,250	1,533	n.a.	n.a.	n.a.

Source: EEC Canada, 2003-2004

Finally, **Table 2.29** presents average album sales of performers in New Brunswick according to whether they employ a manager.

- For solo performers, the incidence of a manager had an effect on album sales. Indeed, solo performers with a manager sold an average of 1,559 units per album, compared to 1,312 units for performers without management.
- The same could be said for duo/group performers. Indeed, duo/group performers with a manager sold an average of 1,500 units per album, compared to 1,363 units for performers without management.
- Where the services of a manager had an important effect on album sales was on the minimum number of unit sales. Indeed, by increasing the minimum number of unit sales, the presence of a manager serves to decrease the financial risks associated with releasing a musical product.

Table 2.29
Album Sales According to Whether Performer Employs A Manager

Employ Manager	... as a solo performer			...as a duo/group performer		
	Min.	Max.	Avr.	Min.	Max.	Avr.
Yes	300	5,000	1,559	1,500	1,500	1,500
No	120	3,333	1,312	100	4,000	1,363

Source: EEC Canada, 2003-2004

4.2.11 Touring

The following sub-section is devoted to touring. Like recording, touring is an integral part of the music industry. It remains the most effective process through which performers may promote themselves and extend their fan base. In addition, touring provides other opportunities to artists, such as developing their public image, as well as perfecting their stage presence and musicianship. Finally, it provides direct feedback for establishing a repertoire and a testing ground for new material. In the tables that follow, as for many previous tables regarding musical artists, data for solo performers has been separated from duo/group performers.

Table 2.30 presents the number of live performances in 2002 for performers according to the type of performance. Overall, the table illustrates that duo/group performers tend to give more live performances than do solo performers.

- A larger proportion of duo/group performers gave 21-50 performances (24.4%) and 50+ performances (34.1%) than did their solo counterpart (21.1% and 15.8%, respectively).
- A larger proportion of duo/group performers did not perform publicly in 2002 (7.3%) than did solo performers (2.6%).

Table 2.30
Number of Live Performances for Duo/Group Performers in 2002 (%)

Type of Performance	Number of Live Performances in 2002						Total
	0	1-5	6-10	11-20	21-50	50+	
Solo	2.6	15.8	23.7	21.1	21.1	15.8	100
Duo/Group	7.3	7.3	7.3	19.5	24.4	34.1	100

Source: EEC Canada, 2003-2004

Tables 2.31a and 2.31b present the geographic distribution of live performances by solo and duo/group performers, respectively. Overall, we can observe that the great majority of live performances for solo and duo/group performers were given either locally or within the province of New Brunswick. More specifically, we can make the following observations:

- Eighty percent of live performances made by solo performers were given within the province of New Brunswick. The same proportion for duo/group performers was 71%, demonstrating that groups tend to perform outside the province often than solo performers.
- Both solo and duo/group performers get few opportunities to tour outside the country. Only 3% of live performances for solo performers and 5% for duo/group performers were international. It is interesting to note that despite its proximity, international performances were more likely to take place elsewhere than the United States.
- As could be expected, the solo and duo/group performers who most often gave international performances were also those performed the most often for the year 2002. Indeed, considering only musical artists with more than 50 performances for the year, the proportion of international performances was 14% for solo performers; the proportion was 10% for duo/group performers.

- Generally, solo performers who give relatively few performances per year (1-10) travelled further (outside of New Brunswick) and more often than did their duo/group counterpart (10%-15% of total performances for solo and 0% for duo/group). However, as already mentioned, amongst performers who give many performances (more than 50), duo/groups tend to travel further and more often.

Table 2.31a
Geographic Distribution of Live Performances for Solo Performers in 2002 (%)

Number of Live Performances in 2002	Local	New Brunswick	Atlantic Canada	Rest of Canada	United States	Other	Total
1-5	46	40	6	4	0	4	100
6-10	63	22	4	11	0	0	100
11-20	46	40	5	8	0	0	100
21-50	41	31	14	12	0	1	100
more than 50	40	26	13	8	4	10	100
Total	49	31	8	9	1	2	100

Source: EEC Canada, 2003-2004

Table 2.31b
Geographic Distribution of Live Performances for Duo/Group Performers in 2002 (%)

Number of Live Performances in 2002	Local	New Brunswick	Atlantic Canada	Rest of Canada	United States	Other	Total
1-5	97	3	0	0	0	0	100
6-10	90	10	0	0	0	0	100
11-20	43	34	11	12	0	0	100
21-50	53	36	6	3	1	1	100
more than 50	17	27	22	25	1	9	100
Total	44	27	12	13	1	4	100

Source: EEC Canada, 2003-2004

Tables 2.32a and 2.32b provide information on the number of live performances given by musical artists for solo and duo/group performers according to who arranged the booking. We can make the following observations:

- All performers who gave more than 50 performances for 2002 called upon the services of booking agents. This observation applies both to solo and duo/group performers. This observation is particularly interesting and suggests that:
- booking agents are more interested in performers who give many performances;
 -
 - by calling upon the services of booking agents, performers may increase the number of live performances.
- Other than organised by a booking agent, there does not appear to be any significant difference in the number of performances given between solo and duo/group performers according to who arranges the booking other than the fact that family/friends and managers were never involved if the performer gives less than 5 performances.

Table 2.32a
Number of Live Performances According to Booking - Solo in 2002 (%)

Booker	Number of Live Performances in 2002					Total
	1-5	6-10	11-20	21-50	More than 50	
Yourself	15.4	30.8	15.4	15.4	23.1	100
Family/Friend	0	25.0	25.0	25.0	25.0	100
Manager	0	22.2	11.1	33.3	33.3	100
Booking Agent	0	0	0	0	100	100
Other	21.4	21.4	21.4	28.6	7.1	100
Total	14.7	26.5	20.6	23.5	14.7	100

Source: EEC Canada, 2003-2004

Table 2.32b
Number of Live Performances According to Booking – Duo/Group in 2002 (%)

Booker	Number of Live Performances in 2002					Total
	1-5	6-10	11-20	21-50	more than 50	
Member of Band	8.0	8.0	24.0	24.0	36.0	100
Friend/Family	0	0	33.3	33.3%	33.3	100
Manager	0	11.1	11.1	11.1	66.7	100
Booking Agent	0	0	0	0	100	100
Other	16.7	0	16.7	33.3	33.3	100
Total	8.1	8.1	21.6	24.3	37.8	100

Source: EEC Canada, 2003-2004

Finally, **Tables 2.33a and 2.33b** present the geographic distribution of live performances according to who arranges the booking.⁹

- It is interesting to note that 75% of performances by solo artists arranged by booking agents were for local performances, an additional 20% were within the province. This proportion differed significantly for duo/group performances, where 26% of live performances arranged by booking agents were local, with an additional 18% within the province.
- Managers and members of family and friends tend to get involved more in non-local performances than all the other categories; this is especially true for duo/group performers.

⁹ Note that if there is a slight discrepancy in figures between the horizontal totals in Tables 2.31a and 2.31b and Tables 2.33a and 2.33b, it is because Tables 2.31a and 2.31b consider the whole sample of performers, whereas Tables 2.33a and 2.33b exclusively consider those who responded to the question.

Table 2.33a
Geographic Distribution of Live Performances According to Booking – Solo (%)

Booker	Local	New Brunswick	Atlantic Canada	Rest of Canada	United States	Other	Total
Yourself	61	15	9	12	1	2	100
Family/Friend	38	34	14	10	1	3	100
Manager	32	43	13	10	1	1	100
Booking Agent	75	20	3	2	0	0	100
Other	41	38	6	10	1	4	100
Total	50	30	8	9	1	2	100

Source: EEC Canada, 2003-2004

Table 2.33b
Geographic Distribution of Live Performances According to Booking – Duo/Group (%)

Booker	Local	New Brunswick	Atlantic Canada	Rest of Canada	United States	Other	Total
Member of Band	46	33	9	10	1	1	100
Friend/Family	10	57	22	10	1	0	100
Manager	15	19	27	27	1	11	100
Booking Agent	26	18	21	29	0	6	100
Other	57	10	18	13	0	2	100
Total	43	27	12	13	1	4	100

Source: EEC Canada, 2003-2004

From the last set of tables, it can generally be concluded solo and duo/group performers in the province call upon a wide range of individuals to assist them in organising their live performances. Such individuals, including friends, members of their family and managers, appear to be used indiscriminately. The notable difference is for booking agents, who tend to associate themselves more closely with solo and duo/group performers who give live performances on a regular basis. However, the performances booked by such agents tend to be close to the place called home for the particular artist.

4.3 Profile of Artist Managers

The following section is dedicated to individuals who manage artists on a professional basis in New Brunswick. A manager is an individual or a company responsible for the day-to-day business of an artist or group. Overall management's responsibility is advancing the artists' interests and career (refer to the glossary at the end of the report for more information about the day-to-day responsibilities of a manager). As is made evident in the tables that follow, not many people in the province are able to undertake such tasks on a full-time basis.

Table 3.1 presents the principal activities of individuals managing artists in the province. The following observations can be made:

- Forty percent of individuals managing artists in the province consider their principal activity to be performing. It is likely that the majority of these performers manage themselves.
- Only 33% of artist managers consider managing as their principal activity.
- Those whose principal activities include song writing, producing albums and promoting concerts were also involved in managing artists.

Table 3.1
Individuals Managing Artists According to Principal Activity

Principal Activity	%
Song Writing	6.7
Performing Music	40.0
Managing Artists	33.3
Producing Albums	6.7
Promoting Concerts	6.7
Other	6.7
Total	100

Source: EEC Canada, 2003-2004

Table 3.2 presents the proportion of total time devoted to managing artists according to principal activity. We can observe the following:

- Although 40% of those involved in managing artists were performers (refer to Table 3.1), this group devoted an average of only 8% of their total time to managing.
- As could be expected, those whose principal activity was managing artists devoted the greatest proportion of their total time to the activity (73%).
- Album producers who manage artists devoted on average 50% of their total time to managing artists.

Table 3.2
Proportion of Total Time Devoted to Managing Artists According to Principal Activity

Principal Activity	% of Total Time
Song Writing	15
Performing Music	8
Managing Artists	73
Producing Albums	50
Promoting Concerts	15
Other	40
Total	36

Source: EEC Canada, 2003-2004

Table 3.3 presents the geographic distribution of individuals managing artists.

- Close to 75% of those involved in managing artists are based in the Moncton area. Although the majority of performers are also based in the Moncton area (55%, refer to Table 2.1), this proportion appears to be high.
- Fredericton, Saint John and the Acadian Peninsula are home to the remaining artist managers, with 13.3%, 6.7% and 6.7%, respectively.

Table 3.3
Geographic Distribution of Individuals Managing Artists

Area	%
Acadian P.	6.7
Fredericton	13.3
Moncton	73.3
Saint John	6.7
Total	100

Source: EEC Canada, 2003-2004

Table 3.4 presents the number of years experience of individuals involved in managing artists in New Brunswick.

- Overall, the range of experience managing artists in the province appears to be well distributed with approximately one third of managers at the beginning of their careers, another third in mid-career, and one final third towards the end of their career.
- The challenge for those interested in the development of the sector would be to ensure the transfer of experience and expertise from those at the end of their careers to those starting out.

Table 3.4
Years Experience in Music Industry of Individuals Managing Artists

Years Experience	%
1-2	26.7
3-5	13.3
6-10	26.7
11-20	26.7
more than 20	6.7
Total	100

Source: EEC Canada, 2003-2004

Finally, **Table 3.5** presents the number of artists represented by managers of the province.

- Two-thirds of managers represent only one artist. Many of these managers tend to be friends or relatives of an artist who decide to take on some of the responsibilities associated with managing part-time as they pursue another career on a full-time basis. These individuals usually start out with little or no experience and learn “on the job” as far as the career of the artist takes them. Once the artist stops performing, or finds more experienced and committed management elsewhere, few of these managers are incited to continue managing.
- Approximately 33% of managers in the province represent more than one artist: 16.7% represented two artists, with another 16.7% representing three or more.

Table 3.5
Number of Artists Represented

Number of Artists	%
1	66.7
2	16.7
3	8.3
4	0
5	0
more than 5	8.3
Total	100

Source: EEC Canada, 2003-2004

4.4 Profile of Album Producers

The following section is dedicated to individuals who produce albums on a professional basis in New Brunswick. A record producer is responsible for overseeing the recording process and bringing the creative product into tangible form. This means being responsible for maximizing the creative process (finding and selecting songs, deciding on arrangements, getting the right sound, etc.) and taking care of all the administration (booking studios, hiring musicians, staying within a budget, filing union reports, etc.). Producers may be associated with studios as employees/owners, or they may operate on an independent basis.

Table 4.1 presents the principal activities of individuals producing albums in the province. The following observations can be made:

- Fifty percent of individuals producing albums in the province consider their principal activity to be performing.
- Only 10% of those who produce albums consider producing to be their principal activity.
- Those whose principal activities included song writing (15%) and recording albums (20%) were also involved in producing albums.

Table 4.1
Individuals Producing Albums According to Principal Activity

Principal Activity	%
Song Writing	15.0
Performing Music	50.0
Recording Albums	20.0
Producing Albums	10.0
Other	5.0
Total	100

Source: EEC Canada, 2003-2004

Table 4.2 presents the proportion of total time devoted to producing albums according to principal activity. We can observe the following:

- As could be expected, those whose principal activity was producing albums devoted the greatest proportion of their total time to the activity, however, this proportion is quite small (22%).
- All other individuals involved in producing albums devoted between 10% and 16% of their total time to the activity.

Table 4.2
Proportion of Total Time Devoted to Producing Albums According to Principal Activity

Principal Activity	%
Song Writing	10
Performing Music	14
Recording Albums	16
Producing Albums	22
Other	10
Total	14

Source: EEC Canada, 2003-2004

Table 4.3 presents the geographic distribution of individuals producing albums.

- Approximately 50% of those involved in producing albums are based in the Moncton area.
- Fredericton, the Acadian Peninsula, Saint John, Miramichi, Campbelton were home to the remaining album producers, with 20%, 10% and 5% each for the last three, respectively.

Table 4.3
Geographic Distribution of Individuals Producing Albums

Area	%
Acadian P.	10.0
Campbelton	5.0
Fredericton	20.0
Miramichi	5.0
Moncton	50.0
Saint John	5.0
St-Stephens	5.0
Total	100

Source: EEC Canada, 2003-2004

Table 4.4 presents the number of years experience of individuals involved producing albums in New Brunswick.

- It is interesting to note that approximately 90% of those involved in producing albums have over 6 years experience; sixty percent have over 11 years experience; while close to a third stated having more than 20 years experience.
- Only 10% of respondents involved in producing albums have less than 2 years experience. It is hoped that these individuals find the means to learn from the more experience.
- Furthermore, As the more experienced approach the end of their careers, it is hoped that a new generation of aspiring producers will enter the field.

Table 4.4
Years Experience in Music Industry of Individuals Producing Albums

Years Experience	%
less than 1	5.0
1-2	5.0
6-10	30.0
11-20	30.0
more than 20	30.0
Total	100

Source: EEC Canada, 2003-2004

Finally, **Table 4.5** presents the average number of recordings produced by album producers per year.

- Approximately one-third of those who produce albums tend to produce less than one per year. These producers are most likely performers who produce their own albums.
- The largest group produce an average of 3-4 recordings per year, while 10% each work on 6-10 and 10-20 recordings.
- Five percent of those who produce albums work on over 20 albums per year.

Table 4.5
Average Number of Recordings Produced Per Year

	%
less than 1	30.0
1-2	20.0
3-4	25.0
6-10	10.0
10-20	10.0
more than 20	5.0
Total	100

Source: EEC Canada, 2003-2004

4.5 Profile of Record Labels

The following section is dedicated to individuals who release albums on a professional basis in New Brunswick. A record label is a business whose main function is to sign, develop and market musical artists. At times, they may also manufacture and distribute musical recordings as well.

Table 5.1 presents the principal activities of individuals releasing albums in the province. The following observations can be made:

- The most important observation is that there are no individuals in the province whose principal activity is releasing albums. This means that none of the individuals who take on this role in the province is committed to the activity.
- Close to 55% of individuals who release albums in the province are performers. This means that the majority of performers take on the responsibilities of a record label because there is no one else in the province that can do so.
- Those whose principal activities included song writing (15.4%), managing artists, producing albums and promoting concerts (each with 7.7%) were also involved in releasing albums.

Table 5.1
Individuals Releasing Albums According to Principal Activity

Principal Activity	%
Song Writing	15.4
Performing Music	53.8
Managing Artists	7.7
Producing Albums	7.7
Promoting Concerts	7.7
Other	7.7
Total	100

Source: EEC Canada, 2003-2004

Table 5.2 presents the proportion of total time devoted to releasing albums according to principal activity. We can observe the following:

- Despite the importance of releasing albums in the career of a performer, the table shows that those involved in releasing albums in the province devote, on average, only 10% of their total time to such activities.
- The proportion of total time devoted by songwriters and managers was 15% each, for performers it was 11%, while album producers and concert promoters devoted 5% each.

Table 5.2
Proportion of Total Time Devoted to Releasing Albums According to Principal Activity

Principal Activity	%
Song Writing	15
Performing Music	11
Managing Artists	15
Producing Albums	5
Promoting Concerts	5
Other	5
Total	10

Source: EEC Canada, 2003-2004

Table 5.3 presents the geographic distribution of individuals releasing albums.

- Approximately 62% of those involved in releasing albums are based in the Moncton area.
- Fredericton, the Acadian Peninsula, Edmunston and St-Stephens are home to the remaining respondents releasing albums, with 15.4% and 7.7% each for the last three, respectively.

Table 5.3
Geographic Distribution of Individuals Releasing Albums

Area	%
Acadian P.	7.7
Edmunston	7.7
Fredericton	15.4
Moncton	61.5
St-Stephens	7.7
Total	100

Source: EEC Canada, 2003-2004

Table 5.4 presents the number of years experience of individuals involved in releasing albums in New Brunswick.

- Although there are not many individuals releasing albums, and none of them that consider it a principal activity, those who do appear to have accumulated many years experience. Indeed, 82% of them have at least 6 years experience and close to 50% have more than 10 years experience.
- The presence of professionals in the province who have accumulated such experience releasing albums constitutes a veritable strength for the industry. These individuals represent a rich potential for training emerging professionals who might be interested in releasing albums on a full-time basis.

Table 5.4
Years Experience in Music Industry of Individuals Releasing Albums

Years Experience	%
3-5	7.7
6-10	46.2
11-20	30.8
more than 20	15.4
Total	100

Source: EEC Canada, 2003-2004

Table 5.5 presents the number of albums released by this group of individuals in 2002.

- It is interesting to note, and perhaps even curious considering that no one devotes more than 15% of their time to the activity, that a proportion of the population reported having released two, and even three albums during the year.
- The majority of the population (61.5%) did not release any albums during the year.
- Twenty-three percent released one album during 2002.

Table 5.5
Number of Albums Released in 2002

Number	%
less than 1	61.5
1	23.1
2	7.7
3	7.7
4	0
5	0
more than 5	0
Total	100

Source: EEC Canada, 2003-2004

Table 5.6 presents the proportion of major expense categories for a typical album release.

- Note the concentration of funds devoted to production, at the expense of promotion and touring.
- This concentration means that those who release albums do not have the resources to undertake a sustained marketing effort. This leaves the product little chance to reach its market.

Table 5.6
Breakdown of Various Expenses as Proportion of Total Budget

Expense	%
Production	71
Promotion	17
Touring	12
Total	100

Source: EEC Canada, 2003-2004

Table 5.7 presents the budget distribution of the last musical album released by respondents (includes production, promotion and touring expenses).

- Sixty percent of albums are released with a total budget of under \$15,000. Although the costs associated with recording have diminished with the advent of digital technologies, \$15,000 is insufficient to compete with the products that have been produced with budgets many times that amount.
- Approximately 30% of releases had a budget over \$30,000 and under \$75,000. The possibility for such budgets in the province is due, in large part, to the presence of the Sound Initiative.

Table 5.7
Total Budget for Last Release

Budget	%
less than 5,000	7.7
5,001-10,000	23.1
10,001-15,000	30.8
15,001-20,000	0
20,001-30,000	7.7
30,001-50,000	15.4
50,001-75,000	15.4
75,001-100,000	0
more than 100,000	0
Total	100

Source: EEC Canada, 2003-2004

The data provided in this section indicates that although funding sources such as the Sound Initiative make it possible for performers in the province to record musical products, such performers do not have adequate resources and professional support to release and promote them. This is a very important challenge for the industry, one that it will need to face if it wants to develop further.

4.6 Profile of Recording studios

The following section is dedicated to individuals who record albums on a professional basis in New Brunswick. A recording studio is used to house the physical equipment for recording music. Many studios are involved in activities other than recording music; they may be used for videos, for television, for feature film work and advertising.

Table 6.1 presents the principal activities of individuals recording albums in the province. The following observations can be made:

- Twenty percent of those involved in recording albums consider it their principal activity.
- Close to 55% of individuals who record albums in the province are performers. This group of performers most likely record albums professionally in order to supplement their overall income.
- Songwriters constitute 17.1% of those involved in recording.

Table 6.1
Individuals Recording Albums According to Principal Activity

Principal Activity	%
Song Writing	17.1
Performing Music	54.3
Managing Artists	2.9
Recording Albums	20.0
Producing Albums	2.9
Sound Technician	2.9
Total	100

Source: EEC Canada, 2003-2004

Table 6.2 presents the proportion of total time devoted to recording albums according to principal activity.

- Not surprisingly, those whose principal activity involved recording albums spent the largest proportion of their time (46%) to it.
- The other individuals spent between 5% (managers) and 20% (sound technicians) to recording.

Table 6.2
Proportion of Total Time Devoted to Recording Albums According to Principal Activity

Principal Activity	%
Song Writing	12
Performing Music	15
Managing Artists	5
Recording Albums	46
Producing Albums	10
Sound Technician	20
Total	20

Source: EEC Canada, 2003-2004

Table 6.3 presents the geographic distribution of individuals recording albums.

- Approximately 57.1% of those involved in recording albums are based in the Moncton area.
- Fredericton is home to the second largest population of those recording albums (14.3%), followed by the Acadian Peninsula and Saint John (8.6%), Campbellton, Edmunston, Miramichi and St-Stephens were also home to some recording activity.

Table 6.3
Geographic Distribution of Individuals Recording Albums

Area	%
Acadian P.	8.6
Campbelton	2.9
Edmunston	2.9
Fredericton	14.3
Miramichi	2.9
Moncton	57.1
Saint John	8.6
St-Stephens	2.9
Total	100

Source: EEC Canada, 2003-2004

Table 6.4 presents the number of years experience of individuals involved in recording albums in New Brunswick.

- The large majority of those recording albums (85%) have over 6 years experience working in the industry. More than 57% have over 11 years experience.

Table 6.4
Years Experience in Music Industry of Individuals Recording Albums

Years Experience	%
less than 1	5.7
1-2	2.9
3-5	5.7
6-10	28.6
11-20	34.3
more than 20	22.9
Total	100

Source: EEC Canada, 2003-2004

Table 6.5 presents the specialisation of those recording albums according to their market.

- Sixty-two percent of the population specialised in recording music albums.
- Advertising constituted the second largest market (15%), followed by television (8%), film (6%) and radio (5%).

Table 6.5
Specialisation According to Market

Market	%
Music Albums	62
Advertising	15
Film	6
Television	8
Radio	5
Other	4
Total	100

Source: EEC Canada, 2003-2004

Table 6.6 presents the number of demos recorded in 2002 by those involved in recording.

- Approximately 37% of the population recorded over 10 demos, with another 5.3% who recorded 9-10.
- The remainder of the population is distributed more or less equally between zero and 5-6 recordings (10.5% to 15.8%).

Table 6.6
Number of Demos Recorded in 2002

Number	%
0	15.8
1-2	15.8
3-4	15.8
5-6	10.5
7-8	0
9-10	5.3
more than 10	36.8
Total	100

Source: EEC Canada, 2003-2004

Table 6.7 presents the number of albums recorded in 2002 by those involved in recording.

- One-third did not record any musical albums in 2002.
- Approximately 11% recorded 5-6 albums. No one indicated having recorded more than six albums in 2002.

Table 6.7
Number of Albums Recorded in 2002

Number	%
0	33.3
1-2	27.8
3-4	27.8
5-6	11.1
7-8	0
9-10	0
more than 10	0
Total	100

Source: EEC Canada, 2003-2004

Finally, **Table 6.8** presents the geographic distribution of the clientele of those who record music in the province. Fifty-five percent of the clientele is local, approximately 75% come from New Brunswick, 11% come from Atlantic Canada, and 9% come from the rest of Canada, while 7% are international clients.

Table 6.8
Geographic Distribution of Clientele

	%
Local	55
New Brunswick	18
Atlantic Canada	11
Rest of Canada	9
International	7

Source: EEC Canada, 2003-2004

4.7 Profile of Distributors

The following section is dedicated to individuals who distribute albums on a professional basis in New Brunswick. Distributors are involved in moving products from the labels to the retailers. They may be independent or affiliated with labels or retailers. In New Brunswick, there is one full-time distributor. The remainder of the distributing activity is largely conducted by performers looking to move their own products.

Table 7.1 presents the principal activities of individuals distributing albums in the province. The following observations can be made:

- Approximately 11% of those involved in distributing albums consider it their principal activity.
- Close to 56% of individuals that distribute albums in the province are performers. This group of performers most likely distribute their own albums.
- Songwriters constitute 33.3% of those involved in distributing.

Table 7.1
Individuals Distributing Albums According to Principal Activity

Principal Activity	%
Song Writing	33.3%
Performing Music	55.6%
Distributing Albums	11.1%
Total	100.0%

Source: EEC Canada, 2003-2004

Table 7.2 presents the proportion of total time devoted to distributing albums according to principal activity.

- Those whose principal activity was distributing albums spent the largest proportion of their time (90%) to it.
- Songwriters spent 15% of their total time to distributing, while performers spent a total of 6%.

Table 7.2
Proportion of Total Time Devoted to Distributing Albums According to Principal Activity

Principal Activity	%
Song Writing	15
Performing Music	6
Distributing Albums	90
Total	18

Source: EEC Canada, 2003-2004

Table 7.3 presents the geographic distribution of individuals distributing albums.

→ Fredericton is home to the largest population of those distributing albums (33.3%), followed by the Acadian Peninsula and Moncton (22.2% each), Edmunston and St-Stephens are home to some recording activity as well.

Table 7.3
Geographic Distribution of Individuals Distributing Albums

Area	%
Acadian P.	22.2
Edmunston	11.1
Fredericton	33.3
Moncton	22.2
St-Stephens	11.1
Total	100

Source: EEC Canada, 2003-2004

Table 7.4 presents the number of years experience of individuals involved distributing albums in New Brunswick.

→ All those distributing albums have over 6 years experience working in the industry. Approximately 11% have more than 20 years experience.

Table 7.4
Years Experience in Music Industry of Individuals Distributing Albums

Years Experience	%
6-10	44.4
11-20	44.4
more than 20	11.1
Total	100

Source: EEC Canada, 2003-2004

4.8 Industry Size

One of the objectives of the present study includes estimating the size of the music industry of New Brunswick. Given the influence of the size of the industry in determining its economic impact on the provincial economy, the importance establishing a realistic estimate is critical.

In order to arrive at an estimate, several methods were used, including:

a. Consulting industry lists, documents and repertoires.

Particularly useful was a repertoire of industry players that are known to operate professionally in New Brunswick. This repertoire, recently compiled by MNB, was completed at the beginning of 2004. Under the supervision of MNB, numerous individuals very familiar with the music industry were employed to verify the list of industry players according to their professional activity.

b. Consulting key industry players

Several key industry players were consulted in order to verify the coverage of the industry lists.

c. Consulting the database

The estimates obtained from the various sources were considered and analysed in function of the database that was created for this study. After careful consideration, estimates were made and are presented in the sub-sections that follow.

4.8.1 Industry Size According to Principal Activity

Table 8.1 presents the number of professionals working in the music industry of New Brunswick according to principal activity (as defined section 4.1.2 *Principal and Secondary activities*).

The following observations can be made:

- It is estimated that 1,250 individuals work in the music industry at a professional level (by professional, here, as for elsewhere in this report, we mean has earned some money through music).
- Artists, that is, songwriters and performers, constitute 1,100 individuals, or 88% of the industry.
- Other professionals, that is, all individuals working in the industry in areas other than as an artist, constitute 150 individuals, or 12% of the industry.

Table 8.1
Individuals According to Principal Activity

Principal Activity	Individuals	%
Song Writing	265	21.2
Performing Music	835	66.8
Total Artists	1,100	88.0
Managing Artists	22	1.8
Booking Concerts	0	0.0
Releasing Albums	0	0.0
Recording Albums	32	2.5
Distributing Albums	1	0.1
Producing Albums	10	0.8
Engineering Albums	0	0.0
Sound Technician	9	0.7
Music Teaching	13	1.1
Promoting Concerts	22	1.8
Publishing Music	4	0.4
Manufacturing Albums	0	0.0
Other	36	2.9
Total Other Professionals	150	12.0
Total Industry	1,250	100.0

Source: EEC Canada, 2003-2004

4.8.2 Industry Size According to Full-Time Equivalents

The estimates above were made according to principal activity. However, as has been demonstrated throughout this report, not all individuals confine their professional activities to their principal activity. Although this is true for the music industry in general (an artist will sometimes produce their own records, a manager will book concerts, etc.) this is especially true in an industry the size and level of development as the one in New Brunswick.

In addition, many individuals in New Brunswick, although working at a professional level, do not devote their professional time exclusively to music-related activities. In fact, only few individuals in New Brunswick are able to devote all of their working time to music. Consequently, when it is pointed out that 1,250 individuals work in the music industry, this should not be taken to mean that 1,250 individuals work full-time.

Table 8.2 revises the estimates presented in **Table 8.1** by considering the actual time allocated to various activities by industry players. It is worth noting that other than the proportion of artists to other professionals, which has been consciously preserved; all other estimates have been modified according to the survey results.

- When secondary activities are considered, the proportion of songwriters to performers changes slightly in favour of songwriters, from 24.1% to 25%, respectively.
- However, when the actual time devoted to these activities is factored-in, the proportion to performers to songwriters swings clearly in favour of performers. Those who are involved in

writing songs tend to devote an average of 55.2% of their working time to music-related activities, this establishes the 274 individuals involved in song writing part-time to the equivalent 152 individuals working full-time.

- It is estimated that 826 individuals perform in the province, corresponding to 532 full-time equivalents.
- Other professionals tend to devote more of their working time to music than do artists, 64.5% to 61.8%, respectively.
- Although no one reported booking concerts, releasing albums, engineering albums or manufacturing albums as their principal activity, several members of the industry provide such services as secondary activities. Indeed, is estimated that the equivalent of 7 individuals working full-time (FTE) book concerts; 3 FTEs release albums (as a record label); 7 FTEs engineer albums; and 0.16 FTEs publish music.
- It is estimated that there are 97 FTEs working as other professionals in the New Brunswick industry.

Table 8.2
Full-Time Equivalents (FTE) According to Activity

Activity	Individuals According to Total Activities	Music Time / Total Time	Full-time equivalent (FTE)
Song Writing	274	55.2%	152
Performing Music	826	64.0%	528
Total Artists	1100	61.8%	680
Managing Artists	19	58.3%	11
Booking Concerts	10	63.9%	7
Releasing Albums	5	72.2%	3
Recording Albums	25	69.7%	17
Distributing Albums	6	86.3%	5
Producing Albums	10	63.5%	6
Engineering Albums	10	73.1%	7
Sound Technician	8	39.8%	3
Music Teaching	16	80.1%	13
Promoting Concerts	14	46.9%	6
Publishing Music	5	26.5%	1
Manufacturing Albums	0.18	90.0%	0.16
Other	24	70.5%	17
Total Other Professionals	150	64.5%	97
Total Industry	1250	62.1%	777

Source: EEC Canada, 2003-2004

Very important to note in this table is that the 1,250 individuals working in the industry corresponds to only 777 full-time equivalents.

4.9 Industry Revenues

Estimating industry revenues was one of the major objectives for this study. For this purpose, respondents were asked to indicate their revenues for the year 2002 according to pre-established revenue categories. The revenue estimates that are presented over the next few tables have been calculated based on their responses as well as on the population estimates presented previously (refer to section 4.8 *Industry Size*).

Table 8.3 presents the breakdown of music-related revenues according to revenue category for individuals working in New Brunswick. The following observations can be made:

- The most common revenue category for the entire industry is the “less than \$5,000” category. Indeed, 38% of respondents claimed their music-related revenues for the year 2002 fall within that spread.
- Over 50% of individuals working in the industry make less than \$10,000 from music in 2002.
- Approximately 25% of the industry is able to generate revenues of over \$20,000.
- Approximately 4% of the industry manages to generate between \$100,000 and \$500,000.

Table 8.3
Distribution of Industry Revenues for 2002

Revenue Category	%
less than \$5,000	38.0
\$5,001-\$10,000	14.1
\$10,001-\$20,000	20.7
\$20,001-\$30,000	12.0
\$30,001-\$40,000	6.5
\$40,001-\$50,000	1.1
\$50,001-\$75,000	3.3
\$75,001-\$100,000	0
\$100,001-\$500,000	4.4
Total	100

Source: EEC Canada, 2003-2004

Overall, the table demonstrates the difficulty industry players have in generating sufficient levels of income to warrant pursuing music-related activities on a full-time basis. Indeed, as will be shown in the next section, a great number of industry players complement their music-related revenues from sectors of the economy unrelated to music.

4.9.1 Industry Revenues According to Principal Activity

In order to obtain discrete revenue amounts, the median from each revenue category was used. This amount was then extrapolated according to estimates of industry size.

Table 8.4 presents the industry revenues for the music industry of New Brunswick for 2002 according to the stated principal activity of respondents. We can make the following observations:

- With revenues of close to \$10.5 million, individuals whose stated principal activity is performing music, generate over half of music industry revenues (52.5%).
- Together with those, whose principal activity is song writing (\$2.3 million), the stated income for total musical artists in the province in 2002 is approximately \$12.8 million, or over 64% of music industry revenues.
- Total revenues for “other professionals” amount to a little over \$7 million in 2002, or 35.8% of total revenues. This proportion of total revenue is quite high considering this group only represents 12% of the total population (refer to Table 8.1).
- Amongst the group of “other professionals,” those whose principal activity is managing artists and promoting concerts have the highest revenues from music, \$1.7 million (8.5% of total) and \$1 million (5.3%), respectively.

Table 8.4
Music Industry Revenues According to Principal Activity for 2002

Principal Activity	\$	%
Song Writing	\$2,324,879	11.7
Performing Music	\$10,438,233	52.5
Total Artists	\$12,763,112	64.2
Managing Artists	\$1,696,533	8.5
Booking Concerts	n.a.	n.a.
Releasing Albums	n.a.	n.a.
Recording Albums	\$572,855	2.9
Distributing Albums	xxx	xxx
Producing Albums	\$77,115	0.4
Engineering Albums	n.a.	n.a.
Sound Technician	\$286,428	1.4
Music Teaching	\$154,230	0.8
Promoting Concerts	\$1,057,579	5.3
Publishing Music	\$11,016	0.1
Manufacturing Albums	n.a.	n.a.
Other	xxx	xxx
Total Other Professionals	\$7,116,627	35.8
Total Industry	\$19,879,740	100.0

Source: EEC Canada, 2003-2004

→ In all, revenues generated from the music industry in New Brunswick in 2002 amount to \$19.9 million.

Table 8.5 presents the proportion of music-related revenues to total revenues¹⁰ as well as the total revenues for the music industry of New Brunswick for 2002 according to the stated principal activity of respondents.

We can make the following observations:

- Overall, music-related revenues represented less than a third (31%) of total revenues for music industry professionals.
- Music-related revenues represented 26% of total revenues for musical artists; this proportion was much higher for other professionals (47%).
- That whose principal activity was distributing albums derives 100% of their revenues from music. Other professional categories that derived the majority of their revenues from music include music teachers (63%) and managers (59%).

Table 8.5
Total Revenues According to Principal Activity for 2002

Principal Activity	Music / Total Revenues (%)	Total Revenues
Song Writing	27	\$8,696,268
Performing Music	26	\$39,790,675
Total Artists	26	\$48,486,943
Managing Artists	59	\$2,897,327
Booking Concerts	n.a.	n.a.
Releasing Albums	n.a.	n.a.
Recording Albums	42	\$1,369,100
Distributing Albums	xxx	xxx
Producing Albums	22	\$344,264
Engineering Albums	n.a.	n.a.
Sound Technician	23	\$1,239,351
Music Teaching	63	\$245,509
Promoting Concerts	29	\$3,617,068
Publishing Music	5	\$220,329
Manufacturing Albums	n.a.	n.a.
Other	xxx	xxx
Total Other Professionals	47	\$15,224,985
Total Industry	31	\$63,711,928

Source: EEC Canada, 2003-2004

Table 8.6 presents per capita music-related and total revenues according to the stated principal activity of respondents. It should be reiterated, however, that the table is organised according to what respondents considered their principal activity. It should not be taken to mean that

¹⁰ Total revenues include revenues generated from activities unrelated to the music industry.

individuals from a particular category necessarily grossed the corresponding per capita amount from that activity.

Table 8.6
Per Capita Revenues According to Principal Activity

Principal Activity	Per Capita Music Revenues	Per Capita Total Revenues
Song Writing	\$8,760	\$32,767
Performing Music	\$12,507	\$47,676
Total Artists	\$11,603	\$44,079
Managing Artists	\$77,496	\$132,347
Booking Concerts	n.a.	n.a.
Releasing Albums	n.a.	n.a.
Recording Albums	\$18,593	\$44,436
Distributing Albums	xxx	xxx
Producing Albums	\$8,646	\$38,599
Engineering Albums	n.a.	n.a.
Sound Technician	\$32,115	\$138,958
Music Teaching	\$11,528	\$18,351
Promoting Concerts	\$48,309	\$165,224
Publishing Music	\$2,470	\$49,407
Manufacturing Albums	n.a.	n.a.
Other	xxx	xxx
Total Other Professionals	\$47,444	\$101,500
Total Industry	\$15,904	\$50,970

Source: EEC Canada, 2003-2004

For a more accurate look at total and per capita revenues from music-related activities in New Brunswick, revenues according to full-time equivalents should be considered (refer to sub-sections 4.9.2 and 4.9.3).

4.9.2 Industry Revenues According to Market

The previous section presented industry revenues according to the stated principal activity of respondents. As stated above, the limitations of such a presentation are:

- a. Respondents' principal activities do not reflect the range and extent of their secondary activities in the music industry;
- b. Revenues organised according to principal activities do not reflect the actual activities in which they were generated.

By organising revenues according to their source, the current section presents a more precise account of industry revenues. **Table 8.7** presents industry revenues according to revenue source in dollar amounts, while **Tables 8.8** and **8.9** present the percentage breakdown of the same information. In addition, the tables divide the revenues according to whether musical artists

(songwriters and performers) generated them or other professionals (managers, bookers, etc.). We can observe the following:

- The largest revenue generating activity is performing music (\$9.30 million), followed by song writing (\$1.09 million), album sales (\$0.92 million), promoting concerts (\$0.90 million), teaching (\$0.85 million), booking concerts (\$0.83 million) and managing artists (\$0.73 million).
- The smallest music-related markets in the province included manufacturing (\$7,712), distributing albums (\$79,384) and engineering albums (\$97,938).

Table 8.7
Music Industry Revenues According to Activity for 2002

Activity (transactions)	Artists (songwriters and performers)	Other Professionals	Total market
Song Writing	\$1,027,217	\$61,692	\$1,088,909
Performing Music	\$9,086,008	\$212,618	\$9,298,625
Managing Artists	\$14,234	\$713,315	\$727,549
Booking Concerts	\$99,638	\$726,535	\$826,173
Album Sales	\$860,680	\$61,692	\$922,372
Royalties	\$311,249	\$194,991	\$506,240
Recording Albums	\$256,211	\$314,630	\$570,841
Distributing Albums	\$13,285	\$66,099	\$79,384
Producing Albums	\$17,081	\$271,666	\$288,746
Record Engineering	\$35,585	\$62,353	\$97,938
Sound Technician	\$91,097	\$154,230	\$245,328
Teaching	\$523,810	\$328,511	\$852,320
Promoting Concerts	\$56,936	\$842,208	\$899,144
Publishing Music	\$14,234	\$168,552	\$182,786
Manufacturing	\$0	\$7,712	\$7,712
Other	\$355,849	\$2,929,825	\$3,285,674
Total	\$12,763,112	\$7,116,627	\$19,879,740

Source: EEC Canada, 2003-2004

Table 8.8
Music Industry Revenues According to Activity (%)

Activity (transactions)	Artists (songwriters and performers)	Other Professionals	Total
Song Writing	94	6	100
Performing Music	98	2	100
Managing Artists	2	98	100
Booking Concerts	12	88	100
Album Sales	93	7	100
Royalties	61	39	100
Recording Albums	45	55	100
Distributing Albums	17	83	100
Producing Albums	6	94	100
Record Engineering	36	64	100
Sound Technician	37	63	100
Teaching	61	39	100
Promoting Concerts	6	94	100
100Publishing Music	8	92	100
Manufacturing	0	100	100
Other	11	89	100
Total	64	36	100

Source: EEC Canada, 2003-2004

Table 8.9
Music Industry Revenues According to Activity (%)

Activity (transactions)	Artists (songwriters and performers)	Other Professionals	Total market
Song Writing	8.05	0.87	5.48
Performing Music	71.19	2.99	46.77
Managing Artists	0.11	10.0	3.66
Booking Concerts	0.78	10.21	4.16
Album Sales	6.74	0.87	4.64
Royalties	2.44	2.74	2.55
Recording Albums	2.01	4.42	2.87
Distributing Albums	0.10	0.93	0.40
Producing Albums	0.13	3.82	1.45
Record Engineering	0.28	0.88	0.49
Sound Technician	0.71	2.17	1.23
Teaching	4.10	4.62	4.29
Promoting Concerts	0.45	11.83	4.52
Publishing Music	0.11	2.37	0.92
Manufacturing	0.00	0.11	0.04
Other	2.79	41.17	16.53
Total	100	100	100

Source: EEC Canada, 2003-2004

-
- The great majority of song writing and performing revenues are generated by songwriters and performers (94% and 98%, respectively). However, musical artists received only 61% royalties, the other 39% going to other professionals.
 - Close to 80% of music-related revenues generated by artists came from song writing (8%) and performing (71%). Other revenue generating activities included album sales (6.7%) and teaching music (4%).
 - Revenues from such activities such as manufacturing (100%) managing artists (98%), producing albums and promoting concerts (94%), publishing music (92%) and booking concerts (88%) were heavily concentrated in the hands of non-artistic professionals.
 - Excluding the “other” category (concert venues, retail, producing and directing music videos, radio, etc.), which was responsible for generating 41% of revenues from non-artistic professionals, promoting concerts (12%) and booking concerts (10%) represented the highest music-related revenue generating activities for the group.
 - Musical artists were responsible for a significant portion of revenues from recording albums (45%), as sound technicians (37%) and engineering albums (36%).

4.9.3 Industry Revenues According to Full-Time Equivalents

The present section looks at industry revenues according to full-time equivalents. This means that revenues are matched according to the activities that generated them (as in section 4.9.2 Industry Revenues According to Market) and then presented on a per capita basis as if the individuals who performed them did so on a full-time basis.

Industry revenues according to FTEs is very useful in that it provides an indication of the types of revenues available in the province if industry players committed 100% of their working time to music related activities and were 100% specialised in that activity.

Table 8.10 presents music-related revenues according to FTEs in New Brunswick for the year 2002. The first two columns, dealing with the number of FTEs and revenue amounts per activity, have already been commented upon in previous sections (refer to 4.8.2 *Industry According to Full-Time Equivalents* and 4.9.2 *Industry Revenues According to Market*, respectively).

The following observations can be made concerning revenues per FTE.

- Per capita FTE revenues for musical artists were approximately \$16,000, including a little over \$7,000 for songwriters and \$18,500 for performers.
- Per capita FTE revenues for other professionals were close to \$93,000. This amount is close to 6 times greater than for artists.
- The highest per capita revenues belonged to activities associated with releasing albums (record label) with \$269,187, promoting concerts (\$140,500), music publishing (\$131,400) and booking concerts (\$125,500).

It is very interesting to remind the reader that despite the high levels of per capita FTE revenues registered for releasing albums and booking concerts, no respondents indicated either of these activities as their principal activity.

Table 8.10
Revenues According to Full-Time Equivalents for 2002

Activity (transactions)	# FTE	Revenue	Per Capita FTE Revenues
Song Writing	152	\$1,088,909	\$7,183
Performing Music	534	\$9,804,865	\$18,560
Total Artists	680	\$10,893,775	\$16,023
Managing Artists	11	\$727,549	\$66,319
Booking Concerts	7	\$826,173	\$125,481
Releasing Albums	3	\$922,372	\$269,187
Recording Albums	17	\$570,841	\$33,105
Distributing Albums	5	\$79,384	\$16,052
Producing Albums	6	\$288,746	\$46,031
Engineering Albums	7	\$97,938	\$13,704
Sound Technician	3	\$245,328	\$80,059
Music Teaching	13	\$852,320	\$67,823
Promoting Concerts	6	\$899,144	\$140,542
Publishing Music	1	\$182,786	\$131,439
Manufacturing Albums	0.16	\$7,712	\$48,737
Other	17	\$3,285,674	\$197,766
Total Other Professionals	97	\$8,985,965	\$92,849
Total Industry	777	\$19,879,740	\$25,597

Source: EEC Canada, 2003-2004

5.0 Economic Impact

There are two steps involved in determining the total economic impact of the music industry on the economy of New Brunswick.

- I. The first consists of estimating the direct impact of the industry, that is to say, the sum of salaries and revenues of individual workers and profits from companies working in the music industry.
- II. The second step consists of estimating the indirect (and induced) impact of the industry, in other words, the impact the music industry has on other sectors of the economy.

5.1.1 Direct Impact

The data used to estimate the direct impact of the music industry on the provincial economy stems from a variety of sources.

Data concerning salaries, revenues and profits from song writing, performing, managing artists, booking concerts, selling albums (excluding retail), royalties, recording, distributing, producing, engineering albums, sound technician, teaching music (excluding teaching in schools and universities), promoting concerts and publishing music is derived from the survey that was administered for this study.

Data concerning salaries and profits from professional arts organisations (for example the New Brunswick Symphony), community arts organisations and associations related to music is derived from the databases of the Arts Development Branch of the Culture and Sports Secretariat of New Brunswick.

The total direct impact from artists, industry professionals and companies working in the music industry is \$16,594,066.

This amount corresponds to the total industry revenues estimated from the survey (\$19,879,740) less the amount generated from activities grouped under the “other” category (\$3,285,674).

The total direct impact from professional arts organisations, festivals, community arts organisations and associations working in the music industry is \$3,200,370.

This amount is broken down as follows: profits from professional arts organisations (\$774,070), the music portion of festivals (\$1,810,594) and community arts organisations and associations (\$615,706).

The total direct impact from the music industry on the provincial economy is \$19,794,436.

5.1.2 Indirect Impact

Due to the nature of its activities, the music industry is in constant interface with several sectors of the economy. For example, music industry professionals regularly call upon the services of lawyers, accountants, photographers, graphic designers and printers when it comes to signing a contract, preparing financial statements and releasing a musical product.

Furthermore, the impact of the music industry on the sale of musical instruments, the sale of musical albums (CD's, cassettes, records, etc.), performance venues, broadcast media such as television and radio, the film and video industries are evident.

Through a series of complex yet very logical series of transactions, the music industry also has an important impact on industries and businesses such as tourism, retail, restaurants, hotels, transportation and bars.

Finally, it should be considered that each person who is exposed to the music industry via a transaction (from a lawyer who prepares a contract, to a waiter who receives a tip from a tourist visiting the region to attend a music festival) in turn also consumes from the monies received indirectly through music.

This cumulative reinforcing interaction between consumption and production whose origin is the music industry is referred to as *indirect* and *induced economic impact*. The process is simply based on the circular flow involved when people receive income by producing goods and then spend this income on additional production.

As could be imagined, this circular flow as it pertains to the music industry of New Brunswick in particular would be very difficult to track. Consequently, for the purposes of this study, we decided to use a multiplier that was provided by Statistics Canada specifically for the music industry. A 'multiplier' is an estimate of the indirect and induced effects of a particular activity on the overall economy. It was produced by setting up a complex set of input-output tables regarding the music industry.

The multiplier supplied by Statistics Canada for the music industry ranged from 1.68 (to estimate the minimum indirect impact) to 1.98 (to estimate the maximum indirect impact).

The total indirect impact from the music industry on the provincial economy using the minimum multiplier is \$13,460,217.

The total indirect impact from the music industry on the provincial economy using the maximum multiplier is \$19,398,548.

5.1.3 Total Economic Impact

The total impact from the music industry on the provincial economy is estimated to fall between \$33,254,653 (minimum) and \$39,192,984 (maximum).

6.0 Observations and Conclusions

The following section is divided into two parts. The first part presents observations on the music industry as a whole, while the second part provides EEC Canada's recommendations.

Observations

The present analysis is largely based on key indicators presented in the report. Relevant data taken from other sources and reports, used to confirm or reinforce the current analysis, was also considered. For the sake of clarity, observations will be numbered and presented in proposition form.

1. **The number of musical artists (songwriters and performers) reported in New Brunswick, 1,100, appears sufficient and appropriate given the population of the province** (approximately 750,000 inhabitants according to Statistics Canada).

If we were to consider musical artists originally from New Brunswick who have pursued their careers outside the province, the number would have been higher.

2. **The number of professionals (also referred to as professional infrastructure) reported in New Brunswick committed to supporting musical artists, 150, is low.**

The proportion of professionals to musical artists, 12% (or approximately 9% once the 3% from 'other' has been rightly excluded), is insufficient to adequately support the number of musical artists.

3. Industry revenues generated from song writing, performing and royalties amounted to \$10,893,775 in 2002. This means that the 1,100 musical artists were able to earn an average of close to \$9,900 from their principal activity.

Such per capita revenues are very low. However, they are *to be expected* given the overwhelming lack of professional infrastructure in the province.

4. **From a cultural perspective, the real consequence of the lack of industry infrastructure is that musical artists are unable to develop their creative and commercial potential while remaining in the province.**

In real terms, this means that musical artists who are more ambitious (regardless their level of talent) feel it is necessary to leave the province and pursue their careers elsewhere *because they cannot find the necessary infrastructure in New Brunswick*.

5. **From an economic perspective, the real consequence of the lack of industry infrastructure is that the potential added-value from exploiting the province's musical talent is not realised.**

In real terms, this means that the provincial economy could benefit significantly with the proper infrastructure in place to develop this potential.

6. At this point, a few questions beg to be asked:

Q1: Are New Brunswick musical artists talented enough to warrant a greater infrastructural base?

Behind this simple question is the notion that perhaps the level of success of musical artists working in New Brunswick is more a function of their talent than any structural insufficiencies of the industry.

This is a valid argument. However, if we consider the number of talented New Brunswick artists in recent history that have moved on to attain national and international success, we find that the argument does not stand up to the facts.¹¹

The reality is that New Brunswick has been home to more than its share of successful musical artists, and there is no reason to believe that it will not be home to more. There will be more. **The point is, whether these musical artists will be able to develop their talent and careers in New Brunswick, and whether the New Brunswick economy will benefit from these careers.**

This point leads us to the second question:

Q2: Is New Brunswick large enough to support a larger music industry?

This is also a valid question. The fact may be that New Brunswick is too small a province to aspire retaining its musical talent. Perhaps it is natural that talented musical artists who wish to attain their creative and commercial potential should need to leave the province to do so.

There are two ways to tackle this question.

One way consists of creating an econometric model with the characteristics of the New Brunswick economy and playing with it to see whether the province is large enough to support a music industry that demonstrates sufficient and necessary industry dynamics. This task is outside the scope of the present study.

A simpler, yet equally conclusive way involves comparing the music industry of New Brunswick to another music industry with characteristics comparable to those of New Brunswick.

Due to its proximity, comparability with respects to size, as well as the availability of relatively recent data,¹² we compared the music industry of New Brunswick with that of Nova Scotia.

¹¹ In case there is any doubt, the following list, although incomplete, should convince even the most hardened sceptic: Chris Commings, Marie-Jo Therio, Janine Boudreau, Julie Doiron, Pierre Robichaud, Lina Boudreau, Julian Austin, Sherley Myers, Jean-Francois Breau, Nathalie Renault, Michel Theriault, Natasha St-Pierre and Rock Voisine. Bands in New Brunswick that are being managed or booked by outside agencies include Glamour Puss, J.P. Leblanc, Danny Boudreau, Mathieu D'astout and Edith Butler.

¹² Data on the Nova Scotia music industry has been taken from the document entitled *1999 Music Industry Survey: Assessment of the Nova Scotia Music Industry*, prepared by Lyle Tilley Davidson.

The Case of Nova Scotia

Nova Scotia has a population of 936,878 inhabitants. In 1999, the direct economic impact of its industry was estimated to fall between **\$52.4 and \$58.6 million** (once music teachers have been subtracted).

New Brunswick has a population of 750,460 inhabitants. The direct economic impact of the music industry of New Brunswick has estimated in the currently study to represent **\$20 million**.

The population of Nova Scotia is 187,000 more than that of New Brunswick (approximately 25% more).

Although it is difficult to compare both figures (due to important methodological differences and because Nova Scotia figures are in 1999 dollars), we can observe a difference of 250% between the two provinces in terms of direct economic impact (the difference would have been 300% if the less conservative estimate was considered).

In other words, with a population base 25% greater than that of New Brunswick, Nova Scotia's music industry has an economic impact that is at least 250% larger.

What this simple comparison conclusively demonstrates, is that the music industry of New Brunswick has room to grow.

7. How much the New Brunswick music industry can grow, and its rate of growth, will largely depend on the measures taken to promote the development of the industry

Even so, EEC Canada is confident that there are sufficient talented musical artists in the province to attain an economic impact that is much larger than its current impact, and that path to increasing the economic impact is by strengthening the industry's infrastructural base.

Once important lapses in the industry's infrastructural base have been successfully addressed, EEC Canada estimates the music industry of New Brunswick could double its direct economic impact to over \$40 million. This represents a total economic impact ranging from \$67 to \$79 million.

Recommendations

Based on its findings, EEC Canada was asked to provide recommendations to the music industry of New Brunswick. Two points deserve mention:

1. **Future industry initiatives seeking to develop the music industry further should concentrate on strengthening the infrastructural base.**

Over the past few years, the province of New Brunswick made a considerable effort to promote the sound recording sector of the music industry. Indeed, since it established the Sound Initiative, administered by the Arts Development Branch of the Culture and Sports Secretariat, experienced and emerging performers with talent were able to look to its own province to finance sound recording projects. Also through the program, recording studios

were able to invest in state-of-the-art equipment in order to guarantee the quality of these recordings.

However, performers cannot find record labels within the province to ensure a proper release and a sustained and effective marketing effort for their quality recordings. Nor can the performers find booking agents to organise tours so that their releases may be properly promoted. Most likely, musical artists will take care of such tasks themselves. To make matters worse, they are hard pressed to find competent and committed managers to help them do it.

For these reasons, EEC Canada recommends that the province take the next step in developing the music industry, which involves strengthening the infrastructural base.

As was demonstrated above in point 5 (refer to the section entitled *Observations*), strengthening the industry's infrastructural base would not only be good for the industry from a cultural perspective, but it would also represent an interesting economic investment, one that promises an interesting return for the province.

Concretely, this means that the province should allocate additional resources to this end. Simply adding financial resources to strengthening the infrastructural base is not enough. Rather, the province should think in terms of establishing the necessary conditions for individuals who have accumulated experience releasing albums, promoting artists, booking tours and managing artists to emerge and form the basis for an infrastructural core.

Details concerning the exact configuration and organisational structure that would be required to create this core have yet to be determined. Nevertheless, it is clear that it would need to bring together artists and professionals together with the common goal of promoting careers, and establishing a dynamic nucleus from which the future development of the industry could emerge.

2. Monitor the development of the New Brunswick music industry on a regular basis.

Thanks to the deployment of the industry-wide survey, policy makers, interested institutions and motivated individuals interested in the future development of the industry now have valuable quantitative and qualitative data on the music industry in New Brunswick at their disposal to inform critical policy decisions that will have an impact on the future of the industry.

EEC Canada recommends the monitoring of the music industry of New Brunswick on a regular basis (say every 5 years) in order to measure the future development of the industry as well as to inform the relative success of all future initiatives.

Appendix A

Resume of Focus Group:

Exploring the Potential for Partnerships Between the Tourism and Music Industries

**Resume of Focus Group:
Exploring the Potential for Partnerships Between the Tourism and Music Industries**

On Wednesday, November 5, 2003, representatives of various organisations playing roles in the New Brunswick music industry came together in Moncton with representatives of Tourism New Brunswick, to participate in a focus group discussing ways to develop partnerships and exploit potential synergies between the two industries. The meeting was organised by Music New Brunswick (MNB) and facilitated by Étude Économique Conseil (EEC Canada) as part of a mandate to develop a profile of the New Brunswick music industry, to evaluate its impact on the economy as a whole, and to suggest the best paths for its future development and growth.

There was some initial distance between the two camps, which reflected a historical situation in which the music industry felt that tourism failed to place enough emphasis on music in their marketing of the province, and had showed little interest in collaborating with musicians or their representatives. For their part, Tourism New Brunswick pointed out that all of their decisions are based on research, and until quite recently, their research showed that music was not what visitors to New Brunswick were most interested in.

Nevertheless, what is important and emerged quickly in the discussion was that the situation has changed. Although Tourism New Brunswick does not believe that many of their clientele will come to New Brunswick for music, they now believe that it could be an important part of what will make visitors stay longer, and they have therefore begun to make New Brunswick's musical culture a part of their marketing efforts. For instance, they bring local musicians with them when they go on tour (to Europe, New York, Quebec and Ontario) to promote New Brunswick as a destination. They have begun to include profiles of major festivals and events in the marketing material they distribute, and to use New Brunswick talent in their TV campaigns.

Some areas for potential development were identified over the course of the discussion, areas that had caused frustration in the past but with a little bit of effort might provide big gains in the near future. For instance, Tourism cited experiences that had made them doubt the market-readiness of New Brunswick musicians. However, they acknowledged that that situation was improving and they suggested that with some effort the music industry could develop some attractive packages to offer to tour operators. They pointed out that there are bus tours and cruise ships bringing many thousands of visitors to New Brunswick, and that the operators would love to be able to include musical experiences in their itinerary.

This led to a discussion of what is required to create "packages" that would be acceptable to tour operators, and an expression of frustration on the part of the music industry at not knowing what is required or not being able to meet the requirements (e.g., knowing schedules and/or pricing six months in advance). Tourism pointed out that you do not necessarily need to sell specific performances if you can develop a "brand" to sell instead.

Some of these difficulties seem to arise from New Brunswick lacking the usual music "businessmen" (agents, promoters, venue operators) who would normally operate as mediators between the businesspersons of the tourism industry and the frequently less business-oriented musicians. While nobody seemed to believe that this situation could quickly be changed, the discussion around this point suggested that increased partnership between musicians and tourism would demonstrate the mutual advantages each has to offer the other, would help to "professionalize" musicians, and might gradually foster the emergence of the underdeveloped business-oriented segment of New Brunswick's music industry.

Other ideas put forward included partnering with hotels to host “kitchen parties” and creating venues and events to target the visitors where they already are (e.g. campgrounds near the ocean, 85 000 cruise ship passengers that pass through Saint John every year). Regional showcases to present local musicians to a region’s tourism industry were suggested as a way to get the two industries working together. A best practices mission, where representatives of both industries visit a place that sells music tourism very well (e.g. Savannah, New Orleans), was proposed by Tourism New Brunswick. They also cited the need for a central repository of information about musicians available to perform, a need which Music New Brunswick is working to fulfill.

Overall, the discussion demonstrated that both industries recognize they have a lot to gain from working together. In a few short hours, many ideas for developing partnerships were proposed, and a genuine enthusiasm for pursuing these opportunities was evident. Further contact is required to identify the most effective and feasible ideas and to see that concrete action is taken.

Appendix B
Survey Questionnaire

**Questionnaire:
Profiling the New Brunswick Music Industry**

Prepared by EEC Canada
for Music NB inc.

December 3, 2003

1. Name of respondent: _____
2. If you are responding on behalf of a company/enterprise, please indicate the name of the company/enterprise:

3. What do you consider to be your principal activity in music and sound recording? (select only one):

Note: Refer to the glossary for more information on selected activities.

- a. Song writing
- b. Singing/Playing music
- c. Managing artists
- d. Booking concerts
- e. Releasing albums (activity of a record label)
- f. Recording albums (activity of a recording studio)
- g. Distributing albums
- h. Producing albums
- i. Engineering records
- j. Sound technician
- k. Music teaching
- l. Promoting concerts
- m. Publishing music
- n. Manufacturing albums
- o. Other , please specify _____

4. What services (include principal activity) do you provide in music at a professional level? Select as many that apply, and indicate what percentage you allocate to each category of your total working time that is dedicated to music:

Note: In this survey, the term “professional” is used to characterise an activity that is associated with a financial transaction, in other words, an activity that is remunerated.

- a. Song writing _____%
- b. Singing/playing music _____%
- c. Managing artists _____%
- d. Booking concerts _____%
- e. Releasing albums _____%
- f. Recording albums _____%
- g. Distributing albums _____%
- h. Producing albums _____%
- i. Engineering records _____%
- j. Sound technician _____%
- k. Music teaching _____%
- l. Promoting concerts _____%
- m. Publishing music _____%
- n. Manufacturing albums _____%
- o. Other _____%, please specify _____
- p. Other _____%, please specify _____

5. In what part of New Brunswick are you based? (choose the city/region that is closest to you):

- a. Acadian Peninsula
- b. Campbelton region
- c. Edmunston region
- d. Fredericton region
- e. Miramichi region
- f. Moncton region
- g. St-John region
- h. St-Stephens region
- i. Woodstock region

6. Indicate your age group:

- a. less than 20
- b. 20-30
- c. 31-40
- d. 41-50
- e. 51-60
- f. more than 60

7. How many years have you been involved in music on a professional basis?

- a. less than 1
- b. 1-2
- c. 3-5
- d. 6-10
- e. 11-20
- f. more than 20

Singers, Musicians (if you included response “b” to question 4)

8. Indicate the extent of your musical training. (if you are not self-taught, you may choose more than one):

- a. Self-taught
- b. Primary school
- c. Secondary school
- d. Post-secondary school
- e. Private music school

9. Are you a solo musician, or do you record/perform as a duo/group? (you may check one or both):

- a. solo
- b. duo/group

if solo (you responded “a” to question 9)

10. What is the name of your solo act? (if the name of your solo act is the same as the name indicated in question 1, rewrite the name indicated in question 1):

11. In what language do you record/perform?

- a. French
- b. English
- c. Other , please specify _____
- d. Instrumental

12. What kind of music do you record/perform?

- a. Pop / Rock / Alternative / Hard Rock
- b. World Music
- c. Country
- d. Gospel / Christian Music
- e. Roots (Folk, Blues, Jazz, & Traditional)
- f. Classical

13. Have you ever released a full-length album? (only consider albums in which you are featured – do not include albums in which you collaborated or provided services as session musician):

- a. yes
- b. no

If you responded “yes” to question 13, respond to questions 14 and 15 and go on to question 16. If you responded “no” to question 13, go straight to question 16.

14. How many full-length albums have you have released?

- a. 1
- b. 2
- c. 3
- d. 4
- e. 5
- f. more than 5

15. Indicate the year and the approximate number of copies sold for each release:

Year _____ Number of copies sold _____
 Year _____ Number of copies sold _____
 Year _____ Number of copies sold _____
 Year _____ Number of copies sold _____
 Year _____ Number of copies sold _____
 Year _____ Number of copies sold _____
 Year _____ Number of copies sold _____

16. Are you currently signed with a record label? (only respond “yes” if you are signed to a record label with whom you are not a stakeholder):

- a. yes
- b. no

If you responded “yes” to question 16, respond to question 17 and go on to question 18. If you responded “no” to question 16, go straight to question 18.

17. Do you or does your record label currently have an agreement with a distributor?

- a. yes
- b. no

18. Do you employ the services of a professional manager?

- a. yes
- b. no

19. Indicate the approximate number of live performances you gave in 2002.

- a. 0
- b. 1-5
- c. 6-10
- d. 11-20
- e. 21-50
- f. more than 50

20. Indicate the geographic breakdown for your live performances in 2002:

Note: “Local” refers to the town/city in which you are based, “New Brunswick” refers to anywhere in the province outside of your town/city.

- a. Local _____ %
 - b. New Brunswick _____ %
 - c. Atlantic Canada _____ %
 - d. Rest of Canada _____ %
 - e. United States _____ %
 - f. Other _____ %
- 100 %

21. Who usually does the booking for your live performances?

- a. Member of your duo/group
- b. Friend /family
- c. Manager
- d. Booking agent
- e. Other , please specify _____

if duo/group (you responded “b” to question 9)

22. What is the name of your duo/group?

23. In what language does your duo/group record/perform?

- a. French
- b. English
- c. Other , please specify _____
- d. Instrumental

24. What kind of music does your duo/group record/perform?

- a. Pop / Rock / Alternative / Hard Rock
- b. World Music
- c. Country
- d. Gospel / Christian Music
- e. Roots (Folk, Blues, Jazz, & Traditional)
- f. Classical
- g. Other , please specify _____

25. Has your duo/group ever released a full-length album? (only consider albums in which your duo/group is featured – do not include albums in which your duo/group collaborated or provided services as session musicians):

- a. yes
- b. no

If you responded “yes” to question 25, respond to questions 26 and 27 and go on to question 28. If you responded “no” to question 25, go straight to question 28.

26. How many full-length albums has your duo/group released?

- a. 1
- b. 2
- c. 3
- d. 4
- e. 5
- f. more than 5

27. Indicate the year and the approximate number of copies sold for each release:

Year _____ Number of copies sold _____
 Year _____ Number of copies sold _____
 Year _____ Number of copies sold _____
 Year _____ Number of copies sold _____
 Year _____ Number of copies sold _____
 Year _____ Number of copies sold _____
 Year _____ Number of copies sold _____

28. Is your duo/group currently signed with a record label? (only respond “yes” if your duo/group is signed to a record label with whom individuals from your duo/group are not stakeholders):

- a. yes
- b. no

If you responded “yes” to question 28, respond to question 29 and go on to question 30. If you responded “no” to question 28, go straight to question 30.

29. Does your duo/group’s record label currently have a distribution agreement with a distributor?

- a. yes
- b. no

30. Does your duo/group employ the services of a professional manager?

- a. yes
- b. no

31. Indicate the approximate number of live performances your duo/group gave in 2002.

- a. 0
- b. 1-5
- c. 6-10
- d. 11-20
- e. 21-50
- f. more than 50

32. Indicate the regional breakdown for your duo/group’s live performances in 2002:

Note: “Local” refers to the town/city in which your duo/group is based, “New Brunswick” refers to anywhere in the province outside of your town/city.

- a. Local %
 - b. New Brunswick %
 - c. Atlantic Canada %
 - d. Rest of Canada %
 - e. United States %
 - f. Other %
- 100 %

33. Who usually does the booking for your duo/group’s live performances?

- a. Member of your duo/group
- b. Friend /family
- c. Manager
- d. Booking agent
- e. Other , please specify _____

Artist Managers (if you included response “c” to question 4)

34. How many artists/groups do you represent?

Note: Include yourself, if you are your own manager or if you are the manager of your duo/group.

- a. 1
- b. 2
- c. 3
- d. 4
- e. 5
- f. more than 5

Record Producers (if you included response "h" to question 4)

35. On average, how many recordings do you produce a year?

Note: Include yourself, if you are your own manager or if you are the manager of your duo/group.

- a. less than 1
- b. 1-2
- c. 3-4
- d. 6-10
- e. 10-20
- f. more than 20

Enterprises (if you included response "c" "d" "e" "f" or "g" "l" "m" "n" to question 4)

36. How many individuals do you employ on a full-time basis?

Note: Please convert part-time staff into full-time equivalents.

- a. less than 1
- b. 1
- c. 2
- d. 3
- e. 4
- f. 5
- g. 6-10
- h. more than 10

Record Labels (if you included response "e" to question 4)

37. How many albums did you release in 2002?

- a. less than 1
- b. 1
- c. 2
- d. 3
- e. 4
- f. 5
- g. more than 5

38. For the last album you released, indicate the expenses as a percentage of your total budget for the following categories:

- a. production _____ %
- b. promotion _____ %
- c. touring _____ %
- d. other _____ %, please specify _____
- e. other _____ %, please specify _____
- f. other _____ %, please specify _____

39. Indicate the total budget for last album you released:

Note: Indicate all aspects of the release, including production, promotion, touring, etc.

- a. less than \$5,000
- b. \$5,001-\$10,000
- c. \$10,001-\$15,000
- d. \$15,001-\$20,000
- e. \$20,001-\$30,000
- f. \$30,001-\$50,000
- g. \$50,001-\$75,000
- h. \$75,001-\$100,000
- i. more than \$100,000

40. Indicate the financial sources for the last album you released:

- a. FACTOR/Musicaction _____%
- b. Canada Council of the Arts _____%
- c. NB Culture and Sports Secretariat _____%
- d. NB Art Board _____%
- e. VideoFACT _____%
- f. PromoFACT _____%
- g. SOCAN Foundation _____%
- h. Radio Starmaker Fund _____%
- i. other _____%, please specify _____
- j. other _____%, please specify _____
- k. other _____%, please specify _____

Recording Studios (if you included response "f" to question 4)

41. In what markets does your studio specialise? Please indicate the percentage of each category:

- a. Music albums _____%
- b. Advertising _____%
- c. Film _____%
- d. Television _____%
- e. Radio _____%
- f. Other _____%, please specify _____

42. How many music demos did you record in 2002?

- a. none
- b. 1-2
- c. 3-4
- d. 5-6
- e. 7-8
- f. 9-10
- g. more than 10

43. How many albums did you record in 2002?

- a. none
- b. 1-2
- c. 3-4
- d. 5-6
- e. 7-8
- f. 9-10
- g. more than 10

44. Indicate the geographic breakdown of your clients:

Note: "Local" refers to the town/city in which your duo/group is based, "New Brunswick" refers to anywhere in the province outside of your town/city.

- a. Local _____%
- b. New Brunswick _____%
- c. Atlantic Canada _____%
- d. Canada _____%
- e. International _____%

Distributors (if you included response “g” to question 4)

45. Indicate the language breakdown of your repertoire:

- a. French _____%
- b. English _____%
- c. Other _____%
- d. Instrumental _____%

46. Indicate the regional breakdown of your repertoire:

- a. New Brunswick _____%
- b. Atlantic Canada _____%
- c. rest of Canada _____%
- d. International _____%

All respondents should answer the following questions

47. What percentage of your working time did you devote to music related activities in 2002?

Note: Indicate the time devoted to music as a percentage of your time devoted to all revenue generating activities.

_____%

48. What percentage of your total revenue in 2002 came from music related activities?

- a. Music _____%
 - b. Other than music _____%
- 100 %

49. What was your total revenue that came solely from music related activities in 2002?

- a. less than \$5,000
- b. \$5,001-\$10,000
- c. \$10,001-\$20,000
- d. \$20,001-\$30,000
- e. \$30,001-\$40,000
- f. \$40,001-\$50,000
- g. \$50,001-\$75,000
- h. \$75,001-\$100,000
- i. \$100,001-\$250,000
- j. \$250,001-\$500,000
- k. more than \$500,000

50. Indicate the sources of your music related revenues and indicate their relative share to your total music related revenues for 2002:

- a. Song writing _____%
- b. Singing/playing music _____%
- c. Managing artists _____%
- d. Booking concerts _____%
- e. Album sales _____%
- f. Royalties _____%
- g. Performing _____%
- h. Recording albums _____%
- i. Distributing albums _____%
- j. Producing albums _____%
- k. Record engineering _____%
- l. Sound technician _____%
- m. Teaching music _____%
- n. Promoting concerts _____%
- o. Publishing music _____%

- p. Manufacturing albums _____ %
- q. Other _____ %, please specify _____
- r. Other _____ %, please specify _____

51. What are your major challenges to furthering your career in the music industry?

- a. _____

- b. _____

- c. _____

52. Are you a member of any professional associations?

- a. yes , which ones: _____

- b. no

53. What types of services do you require/expect from professional associations?

- a. _____

- b. _____

- c. _____

54. Do you have any comments/suggestions regarding Music NB Inc. (Music Industry Association of New Brunswick)?

- a. _____

- b. _____

- c. _____

Questionnaire
Profil de l'industrie de la musique au Nouveau-Brunswick

Préparé par EEC Canada
pour Music NB inc.

le 3 décembre 2003

1. Nom du répondant : _____
2. Si vous répondez au nom d'une entreprise / société, veuillez indiquer le nom de cette entreprise :

3. Quelle est votre activité principale dans l'industrie de la musique et de l'enregistrement sonore? (Choisissez une seule option) :

Note : vous référez au glossaire pour plus d'information sur les activités sélectionnées

- | | | |
|-----------------------------------|--------------------------|---|
| a. auteur-compositeur | <input type="checkbox"/> | |
| b. chanteur / musicien | <input type="checkbox"/> | |
| c. gérance d'artiste | <input type="checkbox"/> | |
| d. agence de spectacle | <input type="checkbox"/> | |
| e. lancement d'albums | <input type="checkbox"/> | (activité d'une maison de disque) |
| f. enregistrement d'albums | <input type="checkbox"/> | (activité d'un studio d'enregistrement) |
| g. distribution d'albums | <input type="checkbox"/> | |
| h. production d'albums | <input type="checkbox"/> | |
| i. ingénieur du son | <input type="checkbox"/> | |
| j. technicien du son | <input type="checkbox"/> | |
| k. professeur de musique | <input type="checkbox"/> | |
| l. promotion d'événement | <input type="checkbox"/> | |
| m. éditeur de musique | <input type="checkbox"/> | |
| n. pressage/reproduction d'albums | <input type="checkbox"/> | |
| o. autre | <input type="checkbox"/> | , veuillez spécifier _____ |

4. Quels services professionnels se rapportant à l'industrie de la musique (incluant votre activité principale) offrez-vous? Vous pouvez sélectionner plusieurs choix s'ils s'appliquent, tout en indiquant pour chacun la portion de votre temps de travail dédié à la musique que vous y allouez.

Note: Dans ce questionnaire, le terme « professionnel » est utilisé pour indiquer une activité liée à une transaction commerciale; en d'autres mots, une activité rémunérée.

- | | | |
|-----------------------------------|--------------------------|-----------------------------------|
| a. auteur-compositeur | <input type="checkbox"/> | _____ % |
| b. chanteur / musicien | <input type="checkbox"/> | _____ % |
| c. gérance d'artiste | <input type="checkbox"/> | _____ % |
| d. agence de spectacle | <input type="checkbox"/> | _____ % |
| e. lancement d'albums | <input type="checkbox"/> | _____ % |
| f. enregistrement d'albums | <input type="checkbox"/> | _____ % |
| g. distribution d'albums | <input type="checkbox"/> | _____ % |
| h. production d'albums | <input type="checkbox"/> | _____ % |
| i. ingénieur du son | <input type="checkbox"/> | _____ % |
| j. technicien du son | <input type="checkbox"/> | _____ % |
| k. professeur de musique | <input type="checkbox"/> | _____ % |
| l. promotion d'événement | <input type="checkbox"/> | _____ % |
| m. éditeur de musique | <input type="checkbox"/> | _____ % |
| n. pressage/reproduction d'albums | <input type="checkbox"/> | _____ % |
| o. Autre | <input type="checkbox"/> | _____ %, veuillez spécifier _____ |
| p. Autre | <input type="checkbox"/> | _____ %, veuillez spécifier _____ |

5. Dans quelle région du Nouveau Brunswick travaillez-vous principalement? (Choisissez la ville / région la plus proche de votre localisation) :

- | | |
|--------------------------|--------------------------|
| a. Péninsule acadienne | <input type="checkbox"/> |
| b. Région de Campbellton | <input type="checkbox"/> |
| c. Région d'Edmunston | <input type="checkbox"/> |
| d. Région de Fredericton | <input type="checkbox"/> |
| e. Région de Miramichi | <input type="checkbox"/> |
| f. Région de Moncton | <input type="checkbox"/> |
| g. Région de St-John | <input type="checkbox"/> |
| h. Région de St-Stephens | <input type="checkbox"/> |
| i. Région de Woodstock | <input type="checkbox"/> |

6. Indiquez votre groupe d'âge :

- a. moins de 20
- b. 20-30
- c. 31-40
- d. 41-50
- e. 51-60
- f. plus de 60

7. Depuis combien d'années êtes-vous professionnel dans l'industrie de la musique?

- g. moins de 1
- h. 1-2
- i. 3-5
- j. 6-10
- k. 11-20
- l. plus de 20

Auteurs-compositeurs, chanteurs, musiciens (si vous avez répondu « b » à la question 4)

8. Indiquez la formation musicale que vous avez reçue (si votre réponse n'est pas « apprentissage autonome », vous pouvez sélectionner plusieurs choix):

- a. apprentissage autonome
- b. école primaire
- c. école secondaire
- d. école postsecondaire
- e. école privée de musique

9. Êtes-vous musicien soliste, ou avez-vous enregistré / donné des spectacles comme membre d'un duo ou d'un groupe? (vous pouvez cocher les deux choix s'ils s'appliquent) :

- a. soliste
- b. duo / groupe

si vous êtes soliste (vous avez répondu « a » à la question 9)

10. Quel est le nom de votre acte solo? (s'il s'agit du même nom que celui donné en réponse à la question 1, veuillez le réécrire ici) :

11. Dans quelle langue enregistrez-vous / chantez-vous?

- a. français
- b. anglais
- c. autre , veuillez spécifier _____
- d. instrumental

12. Quel style de musique enregistrez-vous / jouez-vous?

- a. Pop / Rock / Alternatif / Hard Rock
- b. World Music
- c. Country
- d. Gospel / musique sacrée
- e. Folk, Blues, Jazz et Traditionnel
- f. Classique
- g. Autre , veuillez spécifier _____

13. Avez-vous déjà mis sur le marché un enregistrement de longue durée? (Ne pas tenir compte des enregistrements mettant en vedette d'autres artistes et auxquels vous auriez participé ou pour lesquels vous auriez offert vos services en tant que musicien de studio):

- a. oui
b. non

Si vous avez répondu non à la question 13, alors passez directement à la question 16; si vous avez répondu oui, veuillez répondre aussi aux questions 14 et 15.

14. Combien de vos enregistrements de longue durée ont été mis sur le marché?

- g. 1
h. 2
i. 3
j. 4
k. 5
l. plus de 5

15. Indiquez, pour chaque enregistrement, l'année et le nombre approximatif de copies vendues :

Année _____	Nombre de copies vendues _____
Année _____	Nombre de copies vendues _____
Année _____	Nombre de copies vendues _____
Année _____	Nombre de copies vendues _____
Année _____	Nombre de copies vendues _____
Année _____	Nombre de copies vendues _____
Année _____	Nombre de copies vendues _____

16. Êtes-vous présentement sous contrat avec une maison de disque? (Répondre oui seulement si vous êtes sous contrat avec une maison de disque dans laquelle vous ne détenez pas des parts) :

- a. oui
b. non

Si vous avez répondu non à la question 16, passez directement à la question 18; si vous avez répondu oui à 16, répondez aussi à la question 17.

17. Est-ce que vous ou votre maison de disque détenez une entente de distribution avec un distributeur?

- a. oui
b. non

18. Employez-vous les services d'un gérant professionnel?

- a. oui
b. non

19. Indiquez le nombre approximatif de spectacles pour l'année 2002 :

- a. 0
b. 1-5
c. 6-10
d. 11-20
e. 21-50
f. plus de 50

20. Indiquez la répartition géographique de vos spectacles en 2002 :

Note: "Local" se rapporte à la ville dans laquelle vous travaillez principalement, "Nouveau-Brunswick" inclut toute la province à l'exception de la ville où vous travaillez principalement.

- | | | |
|-------------------------------------|-------|---|
| a. local | _____ | % |
| b. Nouveau-Brunswick | _____ | % |
| c. autres provinces de l'Atlantique | _____ | % |
| d. reste du Canada | _____ | % |
| e. États-Unis | _____ | % |
| f. autre | _____ | % |
| | 100 | % |

21. Qui s'occupe habituellement de vos bookings de spectacles?

- | | |
|---------------------------------|---|
| a. membre de votre duo / groupe | <input type="checkbox"/> |
| b. ami / famille | <input type="checkbox"/> |
| c. gérant | <input type="checkbox"/> |
| d. agence de spectacle | <input type="checkbox"/> |
| e. autre | <input type="checkbox"/> , veuillez spécifier _____ |

si duo/group (vous avez répondu « b » à la question 9)

22. Quel est le nom de votre duo / groupe?

23. Dans quelle langue enregistrez-vous / chantez-vous?

- | | |
|-----------------|---|
| a. français | <input type="checkbox"/> |
| b. anglais | <input type="checkbox"/> |
| c. autre | <input type="checkbox"/> , veuillez spécifier _____ |
| d. instrumental | <input type="checkbox"/> |

24. Quel style de musique votre duo / groupe enregistre-t-il / joue-t-il?

- | | |
|--|--------------------------|
| a. Pop / Rock / Alternatif / Hard Rock | <input type="checkbox"/> |
| b. World Music | <input type="checkbox"/> |
| c. Country | <input type="checkbox"/> |
| d. Gospel / musique sacrée | <input type="checkbox"/> |
| e. Folk, Blues, Jazz et Traditionnel | <input type="checkbox"/> |
| f. Classique | <input type="checkbox"/> |

25. Votre duo / groupe a-t-il déjà mis sur le marché un enregistrement de longue durée? (Ne pas tenir compte des enregistrements mettant en vedette d'autres artistes et auxquels votre duo / groupe aurait participé ou pour lesquels votre formation aurait offert ses services en tant que musiciens de studio) :

- | | |
|--------|--------------------------|
| a. oui | <input type="checkbox"/> |
| b. non | <input type="checkbox"/> |

Si vous avez répondu non à la question 25, alors passez directement à la question 28; si vous avez répondu oui, veuillez répondre aussi aux questions 26 et 27.

26. Combien d'enregistrements de longue durée votre duo / groupe a-t-il mis en marché?

- | | |
|--------------|--------------------------|
| a. 1 | <input type="checkbox"/> |
| b. 2 | <input type="checkbox"/> |
| c. 3 | <input type="checkbox"/> |
| d. 4 | <input type="checkbox"/> |
| e. 5 | <input type="checkbox"/> |
| f. plus de 5 | <input type="checkbox"/> |

27. Indiquez, pour chaque enregistrement, l'année et le nombre approximatif de copies vendues :

Année _____	Nombre de copies vendues _____
Année _____	Nombre de copies vendues _____
Année _____	Nombre de copies vendues _____
Année _____	Nombre de copies vendues _____
Année _____	Nombre de copies vendues _____
Année _____	Nombre de copies vendues _____
Année _____	Nombre de copies vendues _____
Année _____	Nombre de copies vendues _____

28. Votre duo / groupe est-il présentement sous contrat avec une maison de disque? (Répondre oui seulement si votre duo / groupe est sous contrat avec une maison de disque dans laquelle un ou des membre(s) de votre formation ne détient pas des parts) :

- a. oui
- b. non

Si vous avez répondu non à la question 28, passez directement à la question 30; si vous avez répondu oui à 28, répondez aussi à la question 29.

29. La maison de disque de votre duo / groupe détient-elle une entente avec un distributeur?

- a. oui
- b. non

30. Votre duo / groupe emploie-t-il les services d'un gérant professionnel?

- a. oui
- b. non

31. Indiquez le nombre approximatif des spectacles donnés par votre duo / groupe pour l'année 2002 :

- a. 0
- b. 1-5
- c. 6-10
- d. 11-20
- e. 21-50
- f. plus de 50

32. Indiquez la répartition géographique des spectacles de votre duo / groupe en 2002 :

Note: "Local" se rapporte à la ville dans laquelle vous travaillez principalement, "Nouveau-Brunswick" inclut toute la province à l'exception de la ville où vous travaillez principalement.

- | | | |
|-------------------------------------|-------|---|
| a. local | _____ | % |
| b. Nouveau-Brunswick | _____ | % |
| c. autres provinces de l'Atlantique | _____ | % |
| d. reste du Canada | _____ | % |
| e. États-Unis | _____ | % |
| f. autre | _____ | % |
| | 100 | % |

33. Qui s'occupe habituellement de vos bookings de spectacles?

- a. membre de votre duo / groupe
- b. ami / famille
- c. gérant
- d. agence de spectacle
- e. autre , veuillez spécifier _____

Gérants d'artiste (si vous avez répondu « c » à la question 4)

34. Combien d'artistes / formations représentez-vous?

Note: inclure votre acte solo ou votre duo / groupe, si vous vous auto-gérez.

- a. 1
- b. 2
- c. 3
- d. 4
- e. 5
- f. plus de 5

Producteur de disque (si vous avez répondu « h » à la question 4)

35. En moyenne, combien d'albums produisez-vous par année?

Note: Vous inclure vous-même, ou votre duo / groupe, si vous produisez vos propres enregistrements.

- g. moins de 1
- h. 1-2
- i. 3-4
- j. 6-10
- k. 10-20
- l. plus de 20

Entreprises (si vous avez répondu « c », « d », « e », « f » or « g », « l », « m », « n » à la question 4)

36. Combien de personnes à temps plein employez-vous?

Note: Veuillez convertir le personnel à temps partiel en leur équivalent à temps plein.

- a. moins de 1
- b. 1
- c. 2
- d. 3
- e. 4
- f. 5
- g. 6-10
- h. plus de 10

Maisons de disque (si vous avez répondu « e » à la question 4)

37. Combien d'albums ont été produits sous votre étiquette en 2002?

- a. moins de 1
- b. 1
- c. 2
- d. 3
- e. 4
- f. 5
- g. plus de 5

38. Pour le dernier album sorti sous votre étiquette, indiquer, en pourcentage, le ratio dépenses / budget total pour les catégories suivantes :

- a. production _____ %
- b. promotion _____ %
- c. tournée _____ %
- d. autre _____ %, veuillez spécifier _____
- e. autre _____ %, veuillez spécifier _____
- f. autre _____ %, veuillez spécifier _____

39. Indiquez le budget total du dernier album sorti sous votre étiquette :

Note: Indiquer tous les coûts de cette parution, incluant la production, la promotion, les tournées, etc.

- a. moins de 5 000 \$
- b. 5 001 \$-10 000 \$
- c. 10 001 \$-15 000 \$
- d. 15 001 \$-20 000 \$
- e. 20 001 \$-30 000 \$
- f. 30 001 \$-50 000 \$
- g. 50 001 \$-75 000 \$
- h. 75 001 \$-100 000 \$
- i. plus de 100 000 \$

40. Indiquez les sources d'appui financier du dernier album paru sous votre étiquette :

- a. FACTOR/Musicaction _____%
- b. Conseil des Arts du Canada _____%
- c. Secrétariat à la Culture et aux Sports du N.-B. _____%
- d. Conseil des Arts du N.-B. _____%
- e. VideoFACT _____%
- f. PromoFACT _____%
- g. Fondation SOCAN _____%
- h. Fonds pour la Radio Starmaker _____%
- i. autre _____%, veuillez spécifier _____
- j. autre _____%, veuillez spécifier _____
- k. autre _____%, veuillez spécifier _____

Studios d'enregistrement (si vous avez répondu « f » à la question 4)

41. Dans quels marchés votre studio œuvre-t-il principalement? Veuillez indiquer le pourcentage pour chaque catégorie :

- a. albums de musique _____%
- b. publicité _____%
- c. film _____%
- d. télévision _____%
- e. radio _____%
- f. autre _____%, veuillez spécifier _____

42. Combien de démos avez-vous enregistrés en 2002?

- a. aucun
- b. 1-2
- c. 3-4
- d. 5-6
- e. 7-8
- f. 9-10
- g. plus de 10

43. Combien d'albums avez-vous enregistrés en 2002?

- a. aucun
- b. 1-2
- c. 3-4
- d. 5-6
- e. 7-8
- f. 9-10
- g. plus de 10

44. Indiquez la répartition géographique de votre clientèle :

Note: "Local" se rapporte à la ville dans laquelle vous travaillez principalement, "Nouveau-Brunswick" inclut toute la province à l'exception de la ville où vous travaillez principalement.

- a. local _____%
- b. Nouveau-Brunswick _____%
- c. autres provinces de l'Atlantique _____%
- d. Canada _____%
- e. international _____%

Distributeurs (if respondent included response "g" for question 4)

45. Indiquez, en pourcentage, la répartition par langue de votre répertoire :

- a. français _____%
- b. anglais _____%
- c. autre _____%
- d. instrumental _____%

46. Indiquez la répartition géographique de votre répertoire:

- a. Nouveau-Brunswick _____%
- b. autres provinces de l'Atlantique _____%
- c. reste du Canada _____%
- d. international _____%

Les répondants de toutes les catégories peuvent répondre aux questions suivantes

47. Quel pourcentage de vos heures de travail avez-vous alloué à des activités musicales en 2002?

Note: Indiquer le temps alloué à la musique par rapport à toutes vos activités génératrices de revenu.

_____%

48. Quel pourcentage de votre revenu total en 2002 provient de vos activités musicales?

- a. musique _____%
 - b. autre que musique _____%
- 100 %

49. Quel était votre revenu total provenant exclusivement de vos activités musicales en 2002?

- a. Moins de 5 000 \$
- b. 5 001 \$-10 000 \$
- c. 10 001 \$-20 000 \$
- d. 20 001 \$-30 000 \$
- e. 30 001 \$-40 000 \$
- f. 40 001 \$-50 000 \$
- g. 50 001 \$-75 000 \$
- h. 75 001 \$-100 000 \$
- i. 100 001 \$-250 000 \$
- j. 250 001 \$-500 000 \$
- k. plus de 500 000 \$

50. Pour 2002, Indiquez plus précisément les sources des revenus générés par vos activités musicales, et indiquez en pourcentage l'importance relative de chacune de ces sources comparée au revenu total généré par des activités musicales :

- | | | |
|-------------------------------------|--------------------------|-----------------------------------|
| a. auteur-compositeur | <input type="checkbox"/> | _____ % |
| b. chanteur / musicien | <input type="checkbox"/> | _____ % |
| c. gérance d'artistes | <input type="checkbox"/> | _____ % |
| d. engagements concerts | <input type="checkbox"/> | _____ % |
| e. ventes d'albums | <input type="checkbox"/> | _____ % |
| f. redevances | <input type="checkbox"/> | _____ % |
| g. performances | <input type="checkbox"/> | _____ % |
| h. enregistrement d'albums | <input type="checkbox"/> | _____ % |
| i. distribution d'albums | <input type="checkbox"/> | _____ % |
| j. production d'albums | <input type="checkbox"/> | _____ % |
| k. ingénieur du son | <input type="checkbox"/> | _____ % |
| l. technicien du son | <input type="checkbox"/> | _____ % |
| m. enseignement de la musique | <input type="checkbox"/> | _____ % |
| n. promotion de concerts | <input type="checkbox"/> | _____ % |
| o. édition de musique, partitions | <input type="checkbox"/> | _____ % |
| p. pressage / reproduction d'albums | <input type="checkbox"/> | _____ % |
| q. autre | <input type="checkbox"/> | _____ %, veuillez spécifier _____ |
| r. autre | <input type="checkbox"/> | _____ %, veuillez spécifier _____ |

51. Identifiez les défis les plus importants à relever afin de faire avancer votre carrière dans l'industrie de la musique :

- a. _____
- b. _____
- c. _____

52. Êtes-vous membre d'une ou de plusieurs associations professionnelles?

- a. oui , lesquelles : _____
- b. non

53. Quels types de services auriez-vous besoin ou aimeriez-vous obtenir auprès d'associations professionnelles?

- a. _____
- b. _____
- c. _____

54. Avez-vous des commentaires ou des suggestions concernant Musique Nouveau-Brunswick Inc. (Association de l'Industrie de la Musique du Nouveau-Brunswick)?

- a. _____
- b. _____
- c. _____

Appendix C

Glossary

Glossary

Songwriter:	A Songwriter is an individual who composes or writes the lyrics or musical score of a song or an instrumental work.
Artists:	In this report, Artists refer to songwriters and performers.
Artist Manager:	An Artist Manager individual or a company that is responsible for the day-to-day business of an artist or group. The overall responsibility of management is to advance the artists' interests and career. Their activities include the planning and implementation of marketing and business plans, including activities such as revenue and expense controls, radio promotion, print promotion, television appearances, arranging live concerts and booking, arranging distribution, pursuing label's A&R representatives, and other activities associated with the running of a music business. An artists' Personal Manager is the person in charge of the artists' career. He or she is the general manager and chief operating officer of the artists' enterprise. An artists' Business Manager is the person who handles the financial aspect of the artists' enterprise, general accounting and bookkeeping, cash flow management, payroll, Provincial and Federal tax remission and general reconciliation of tours, recordings and investments.
Booking Agent:	A Booking Agent is a person involved almost exclusively in booking live personal appearances (concerts) and sometimes in commercials, tour sponsorship, television specials, and other areas.
Record Label:	A Record Label is a business whose main function is to sign, develop, market, manufacture and distribute the work of musical artists. Some, but not all major record labels own their own replication plants and do their own manufacturing. All forms of record labels provide some or all of the above-described activities.
Recording Studio:	A Recording Studio is the premises used to house the physical equipment for recording music. Many studios are involved in activities other than recording musical albums; they may be used for videos, for television, for feature film work and for advertising.
Distributor:	A Distributor is a company whose primary activity moving musical products from the labels to the retailers. Distributors may be independent or affiliated with labels or retailers. The major labels' distributors generally also distribute product on behalf of the independent labels, who themselves lack an ability to reach national markets.
Record Producer:	A Record Producer is responsible for overseeing and bringing the creative product into tangible form (a recording). This includes being responsible for maximizing the creative process (finding and selecting songs, deciding on arrangements, getting the right vocal sound, etc.) and taking care of all the administration (booking studios, hiring musicians, staying within a budget, filing union reports, etc.). Producers may be associated with studios (as employees/owners) or they may operate on an independent basis.
Sound Technician:	A Sound Technician is a person who mixes the live sound on stage (monitors) and for the audience (front-of-house). As well, the sound technician or soundman generally coordinates all the sound/audio elements of a performance.
Concert Promoter:	A Concert Promoter is a person who assumes, in whole or in part, the financial risk and the management of events with performances by various artists, for which he/she is the holder or joint holder of the rights and of which he/she is not the performer.
Publisher:	A Music Publisher is an individual or company whose main function is to publish musical or instrumental works and to manage catalogues. Some artists will set up their own publishing companies to control the management of their catalogues. Additionally, publishers print and distribute music and exploit the copyrights. They are often associated with a major label and are involved in representing and promoting works composed by the composer and lyricist.