

**SaskMusic  
Economic Impact Assessment  
of the Saskatchewan Music Industry  
Final report  
September 15, 2008**

**kisquared**



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**Table of Contents**

INTRODUCTION ..... 4

EXECUTIVE SUMMARY ..... 6

    Size of the Saskatchewan music industry ..... 6

    Economic impact ..... 7

        Overall ..... 7

        Impact on Saskatchewan GDP ..... 7

        Impact on labour income and employment ..... 7

        Impact of one dollar of spending by the Saskatchewan music industry ..... 7

GLOSSARY OF TERMS ..... 8

SASKATCHEWAN MUSIC INDUSTRY PROFILE AND ECONOMIC IMPACT ..... 10

    Size of the Saskatchewan music industry ..... 10

        Music industry activity ..... 10

        Group size ..... 11

    Economic impact analysis ..... 12

        Summary of economic impact ..... 12

        Music industry expenditures ..... 13

        Impact on Saskatchewan GDP ..... 14

        Impact on labour income and employment ..... 15

        Impact of one dollar of spending by the Saskatchewan music industry ..... 16

    Employment and wages in the Saskatchewan music industry ..... 17

        Employment in the industry ..... 17

        Percent of industry employment directly related to music ..... 18

        Wages in the Saskatchewan music industry ..... 19

        Distribution of full-time equivalent employment ..... 20

    Goods and Services Tax (GST) remittances and refunds ..... 21

INDUSTRY REVENUES AND EXPENDITURES ..... 22

    Music industry overview ..... 22

        Overview of music industry revenues ..... 22

        Overview of music industry expenditures ..... 23

    Artist revenues ..... 24

        Artist revenues – sales/performance ..... 25

        Artist revenues – music industry services ..... 26

    Artist expenditures ..... 27

        Artist expenditures – equipment ..... 27

        Artist expenditures – travel and transportation ..... 29

        Artist expenditures – outsourced professional services ..... 30

        Artist expenditures – office and other business expenditures ..... 32

    Service provider revenues ..... 33

    Service provider expenditures ..... 35

        Service provider expenditures – equipment ..... 35

        Service provider expenditures – travel and transportation ..... 37

        Service provider expenditures – outsourced professional services ..... 38

        Service provider expenditures – office and other business expenditures ..... 39

SOURCES OF FINANCING .....	42
Grants / government funding.....	42
<i>Industry overall</i> .....	42
<i>Distribution of funding</i> .....	42
Loans and credit .....	43
<i>Industry overall</i> .....	43
<i>Artist loans and credit</i> .....	43
<i>Service provider loans and credit</i> .....	43
RECOMMENDATIONS FOR ONGOING DATA COLLECTION .....	44
<i>Use industry tested definition</i> .....	44
<i>Ensure comparability across jurisdictions</i> .....	44
<i>Count the population</i> .....	45
APPENDIX A: COMPARATIVE REVIEW OF PAST MUSIC INDUSTRY STUDIES .....	46
Past Saskatchewan music industry studies .....	46
Other provincial and territorial music industries .....	47
APPENDIX B: STUDY PARAMETERS.....	49
Scope and definition of industry .....	49
Sample development .....	50
Counting artists and service providers .....	50
Questionnaire design .....	51
Data collection .....	52
Data cleaning, organization and analysis.....	52
Economic impact analysis – method and rationale .....	53
Recommendation for ongoing data collection .....	55
APPENDIX C: RESPONDENT PROFILE.....	56
<i>Role</i> .....	56
<i>Region</i> .....	57
<i>Gender</i> .....	57
<i>Age</i> .....	58
<i>Years in music industry</i> .....	58
<i>Respondent interest in survey findings</i> .....	59
APPENDIX D: QUESTIONNAIRES .....	60
Qualifying (screening) questionnaire.....	60
Solo artist questionnaire.....	64
Group questionnaire .....	73
Service provider questionnaire.....	84

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## Introduction

In April 2008, SaskMusic, the Saskatchewan Recording Industry Association, engaged **kisquared** to conduct an economic impact assessment of the Saskatchewan music industry, which had never before been thoroughly undertaken. A study of Saskatchewan's music industry was conducted in 2007 (Saskatchewan Music Industry Review); however, there are several key differences between the studies.

The 2007 music industry review provided rich data regarding the internal workings, practices and attitudes of music industry participants. Data included roles played, time spent on different activities, the importance placed on various types of funding support, satisfaction with the same supports, perceptions of the industry in Saskatchewan, relationships with service providers, promotional strategies, and participation in programs and activities.

This 2008 economic impact study builds on those results by providing data that was not collected in the 2007 study – namely, economic data that illustrates how activities of those same music industry players generate economic growth and employment in the province of Saskatchewan. Where the 2007 study was largely focused on the internal organization and perceptions of the industry, this study focuses on how the industry interacts with and generates economic growth in other industries.

This report illustrates who accounts for the bulk of that economic impact, where the money goes and how much is spent in-province, so the route of a hypothetical \$1 expenditure is traced from the industry to new jobs and economic growth in the province. This study is important for informing future decisions on funding and supports for the Saskatchewan music industry.

More specifically, this economic impact study collected the following data that was not collected in the 2007 study:

- Accurate estimates of the size of the Saskatchewan music industry, including the number of service providers, groups, and solo artists/songwriters;
- A detailed summary of the total revenues earned by music industry players, with an itemized breakdown by category;
- A reported list of funding sources, as well as sources of loans and credit used by music industry establishments;
- A detailed summary of the total expenditures incurred by music industry players, with an itemized breakdown by category;
- A detailed summary of the total *in-province* expenditures incurred by music industry players, with an itemized breakdown by category;
- Employment, in number of full-time equivalent positions, generated by the industry with a breakdown into both music-related and non-music related employment;
- Total wages and salaries earned by direct music industry employees;
- GST remittances and refunds earned by music industry establishments; and

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- An estimate of indirect economic impact, or spin-off, associated with music industry activity in the province of Saskatchewan in the form of contribution to GDP and provincial employment.

**kisquared**, with assistance from SaskMusic, developed the music industry sample, based on existing industry databases, organizational and guild membership lists, contact directories, and other secondary sources. In addition, “snowball” recruiting was used throughout interviewing to elicit as many contacts as possible and thereby expand the total sample to achieve a reliable population estimate.

**kisquared**, working in close consultation with SaskMusic, designed a comprehensive questionnaire administered to industry participants, which was subsequently validated through consultation sessions with artists and service providers.

Music industry revenue and expenditures data was collected for 2007 in the belief that respondents overall are best able to conceive of and provide figures for a standard calendar year (a best practice used in three other economic impact studies conducted by **kisquared** to-date).

**kisquared** completed a total of 446 telephone interviews, comprised of 160 solo artists (of an estimated population of 1,150 for a margin of error of  $\pm 6.67\%$ ), 121 group artists (of an estimated population of 394 for a margin of error of  $\pm 6.17\%$ ), and 165 service providers (of an estimated population of 542 for a margin of error of  $\pm 5.31\%$ ). The overall margin of error for the study, based on the three population estimates, is  $\pm 4.95\%$  at the 95% confidence level. The combined margin of error for both solo and group artists, findings for which are combined through most of the report, is  $\pm 4.78\%$ .

Readers should also note that, unless otherwise indicated, all figures in the body of this report are weighted to the music industry population size of 2,087, the derivation of which is discussed in *Appendix B: Study parameters*. This report is structured as follows:

- **Introduction** – overview of project objectives, methodology and terminology.
- **Executive summary** – overview of principal study findings.
- **Saskatchewan music industry profile and economic impact** – comprehensive findings regarding size of the industry; employment and wage data; estimates of impact on aggregate demand.
- **Industry revenues and expenditures** – comprehensive findings regarding revenue and expense data by category and industry role, and discussion of results.
- **Sources of financing** – comprehensive findings detailing sources of financing data by category and industry role; discussion of results.
- **Recommendation for ongoing data collection** – recommendations for future data collection and data management.
- **Appendices** – Appendix A: Comparative review of past music industry studies, Appendix B: Study parameters (background and objectives, methodology, reporting); Appendix C: Respondent profile; and Appendix D: Questionnaires.

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## Executive summary

In April 2008, SaskMusic, the Saskatchewan Recording Industry Association engaged **kisquared** to conduct an economic impact assessment of the Saskatchewan music industry. Results are based on 446 interviews with members of the Saskatchewan’s music industry. Except where noted, figures are weighted to the music industry population size of 2,087.

### Size of the Saskatchewan music industry

- The estimated population of the Saskatchewan music industry is 2,087 (counting both artists and service providers).

**Figure 1 SASKATCHEWAN MUSIC INDUSTRY – COUNTS BY CATEGORY**

Category	Sub-category	Count
Artists (1,544)	Solo artists	1,150
	Groups	394
Service providers (542)	Accounting, consulting, writing and legal services	23
	Booking agencies and management	38
	Gear, instruments and media (sales, service and manufacturing)	59
	Media, design, promotions and technical services	43
	Music instructors	156
	Music organizations	20
	Production, publishing, distribution and record companies	65
	Recording studios	52
	Talent buyers	39
	Venues	47
<b>Total</b>		<b>2,087</b>

**Note:** The figures in this table should *not* be interpreted as full-time equivalent (FTE) employment counts. Totals may not equal the sum of their components due to rounding.

- In terms of industry role, 55% are solo artists, 19% are members of groups, and 26% represent service providers. Fifty-eight percent have been in the music industry for more than ten years, while five percent have been in the industry for less than two years. Thirty-eight percent are based in Regina, while thirty-six percent are based in Saskatoon.
- The gender ratio is 71% male to 29% female. The average respondent is 42 years old.

## Economic impact

### Overall

- Saskatchewan music industry revenues in 2007 total \$82.8 million. Service providers together earn \$65.6 million, while artists earn the remaining \$17.2 million. Expenditures total \$81.3 million (including \$18.8 million in salaries and wages).
- Of all expenditures, \$63.9 million or 79% is spent in Saskatchewan, directly benefiting Saskatchewan suppliers. Service providers typically spend a higher proportion of their total expenditures in Saskatchewan (80%) than do artists (74%), but when salaries are excluded, the share is 72% for both artists and service providers.

### Impact on Saskatchewan GDP

- The sum of both direct and indirect (“spin-off”) effects constituted \$26.2 million or 0.05% of the province’s \$50.96 billion GDP (in current dollars) in 2007.

### Impact on labour income and employment

- The Saskatchewan music industry spent \$18.8 million in wages and salaries in 2007. Service providers account for 96% (\$17.9 million), while artists account for 4% (\$0.8 million).
- Venues are the largest generators of music-related wages and salaries, at \$7.9 million, or 42% of total industry music-related wages and salaries.
- Direct and indirect effects of music industry spending produce \$19.4 million in Saskatchewan labour income. This represents 74% of the industry’s positive impact on GDP.
- Employment generated by the industry totals 1,314 person-years when music industry employment (759 FTEs) is combined with the direct and indirect effects of its expenditures (555 person-years). Note that the units (FTEs and person-years) are not perfectly equivalent.

### Impact of one dollar of spending by the Saskatchewan music industry

- Each \$1 expenditure made by the Saskatchewan music industry increases Saskatchewan’s GDP by 32¢ when direct and indirect economic effects are considered. Of this 32¢, 24¢ is in the form of additional Saskatchewan labour income. Of every \$1 spent by the industry, 21¢ is spent outside of Saskatchewan.
- The number of jobs created by the industry is 6.8 person-years per \$1 million expenditure.

## Glossary of terms

Some terms used in this report may be unfamiliar to some readers. Definitions are as follows:

- **Artist:** for the purposes of this study, the term “artist” refers to solo performers and composers, including DJs, as well as any collection of two or more individuals pursuing those activities. Where the terms “solo artist” or “group artist” are used, they signify an individual or a collectivity accordingly (see Figure 40 under *Scope and definition of industry*, in *Appendix B: Study parameters*).
- **ASCAP:** stands for the American Society of Composers, Authors and Publishers. ASCAP is a membership association of over 250,000 U.S. composers, songwriters, lyricists, and music publishers of every kind of music.
- **BMI:** Broadcast Music, Inc. is an American performing rights organization that represents more than 300,000 songwriters, composers and music publishers in all genres of music. It collects license fees for the “public performances” of its repertoire, which are then distributed as royalties to writers, composers and copyright holders it represents.
- **Direct effects:** means the impact on firms that expand or reduce production in *direct* response to a change in demand, in this case to demand exercised by music industry artists and service providers.
- **Direct leakage:** is the portion of music industry expenditure that is spent outside of Saskatchewan. Capturing this data is an important part of this study’s methodology, because provincial economic impact can only be calculated on Saskatchewan-based expenditures.
- **Distribution Rights:** this is the right to distribute published copies of a piece of music. This right is exercised by the publisher, and the publisher pays the composer a royalty for same.
- **FACTOR:** is the Foundation to Assist Canadian Talent on Records. It is a private non-profit organization that provides assistance toward the growth and development of the Canadian independent recording industry.
- **Gross Domestic Product (GDP) at basic prices:** means the total unduplicated value of the goods and services produced in a given province or country during a given period. GDP at basic prices refers to valuation in terms of the factors of production (capital, labour), plus taxes on production. The valuation at basic price is the internationally preferred method to value the cost of factors of production used in the production process. It differs from GDP at market prices in excluding subsidies and indirect taxes on products (such as sales taxes). It does, however, include net indirect taxes on production – i.e., taxes such as property and business taxes that are not levied on products directly but which are typically passed on to consumers in the pricing of those products.
- **Gross Domestic Product (GDP) at market prices:** means the total unduplicated value of the goods and services produced in a given province or country during a given period. GDP at market prices refers to valuation in terms of prices paid by the purchaser, that is, after all applicable taxes and subsidies have been added.
- **Indirect effects:** refers to the ripple or “spin-off” effect of directly impacted firms placing increased or decreased demands on their suppliers. In this study, the spin-off for the entire Saskatchewan music industry is estimated.



- **Labour Income:** is an important contributor to economic growth, and is a large component of GDP. Labour income represents the sum of wages and salaries, supplementary labour income (such as employers' social contributions), and mixed income (the net income of unincorporated businesses).
- **Mechanical Rights:** this is the right to reproduce and distribute a performance of a composition on CD, record, or tape. The first time a piece is recorded the recording company must have permission from the mechanical rights holder (usually the publisher) but all subsequent recordings can be without permission so long as the standard fee is paid to the mechanical rights holder.
- **Mechanical royalties/other royalties:** a royalty is a sum paid to the creator of performance art for the use of that art. Mechanical royalties are paid for the reproduction of songs.
- **PA system or equipment:** a public address system (or PA system) is an electronic amplification system used as a communication system in public areas. It is an amplification setup with an amplifier and loudspeakers, used to reinforce a given sound so that the audience can hear it clearly. The PA system is controlled from a mixer that blends the incoming signals from microphones and musical instruments, modifies the tone, and controls the overall level of the signal that is sent to the amplifier.
- **Performance Rights:** this refers to the right to perform a work at public concerts. Collection of fees for performance rights is done by performing rights organizations such as ASCAP, BMI and SOCAN and is accomplished by annual blanket licenses or one-time special licenses for all concert uses of any music represented by the licensing agency.
- **Purchasers' price:** the valuation of a commodity at the point of delivery to the purchaser. The purchasers' price includes trade and transportation margins (to move the commodity from the producers' 'factory gate' to the purchaser), and commodity taxes levied after leaving the producers' plant.
- **Producer prices:** the equivalent of sales price at the 'factory gate' (i.e., where the commodity is produced or manufactured), which excludes trade and transportation margins.
- **SOCAN:** the Society of Composers, Authors and Music Publishers of Canada is an organization that administers the communication and performing rights of virtually the world's entire repertoire of copyright-protected music when it is used in Canada. SOCAN collects license fees, then distributes the fees as royalties to its members and affiliated performing rights organizations.
- **Service provider:** for the purposes of this study, "service provider" is used to refer to an individual, business, organization, or venue that supplies goods and/or services related to the music industry (see Figure 40 in *Appendix B: Study parameters*).
- **Synchronization Rights:** the right to use a composition in film, TV, or video. It is negotiated by the publisher if the publisher is the copyright holder, and the revenues received by the publisher are distributed according to agreement between the publisher and the composer.
- **Total Open (Type I) Impacts:** the sum of direct and indirect effects.

As necessary, the above definitions have been adapted from Statistics Canada, *The Input-Output Structure of the Canadian Economy, 2003-2004*; Northwest Territories Bureau of Statistics, *NWT Input-Output Model: An Overview*, June 2006; and Manitoba Bureau of Statistics, *Manitoba Economic Multipliers*, 2004.

## Saskatchewan music industry profile and economic impact

The Saskatchewan music industry profile and economic impact findings presented here are meant not only to describe the characteristics of the industry in the province, but also to provide some “hard numbers” placing the Saskatchewan music industry in the context of the economy as a whole.

The industry profile begins with the size of the music industry in Saskatchewan, illustrating the numbers of artists and businesses active in the industry (including the size of music groups). It then discusses the economic impact of the Saskatchewan industry, including its impact on GDP, labour income and employment.

Following the economic impact discussion, this section then shows direct employment in terms of full-time equivalent employees (FTEs) along with wages and salaries generated by the industry in the province.

Some terms used in this report may be unfamiliar to some readers; for assistance, readers may consult the *Glossary of terms* that precedes this section.

### Size of the Saskatchewan music industry

#### Music industry activity

Figure 2 below provides a breakdown of the numbers of artists and service providers operating as part of the Saskatchewan music industry. The music industry in Saskatchewan is first divided into two broad categories of artist and service provider, then into descriptive sub-categories.

It is important to note that the counts provided in Figure 2 do **not** directly reflect the number of **persons** employed in a given industry category, but rather indicate numbers of businesses or organizations associated with that category.

Therefore, although the count of 1,150 in the sub-category of solo artists *does* correspond to 1,150 *persons* in that sub-category, the count of 156 in the sub-category of music instructors signifies 156 *entities* providing music instruction, some of which are businesses or other organizations employing a number of individuals.

**Figure 2 SASKATCHEWAN MUSIC INDUSTRY – COUNTS BY CATEGORY**

Category	Sub-category	Count
Artists (1,544)	Solo artists	1,150
	Groups	394
Service providers (542)	Accounting, consulting, writing and legal services	23
	Booking agencies and management	38
	Gear, instruments and media (sales, service and manufacturing)	59
	Media, design, promotions and technical services	43
	Music instructors	156
	Music organizations	20
	Production, publishing, distribution and record companies	65
	Recording studios	52
	Talent buyers	39
	Venues	47
<b>Total</b>		<b>2,087</b>

Note: The figures in this table should *not* be interpreted as full-time equivalent (FTE) employment counts. Totals may not equal the sum of their components due to rounding.

### Group size

Figure 3 provides a breakdown of the Saskatchewan music industry by group size. Group artists (as distinct from solo artists, which are included below) range in size from two to 102 members; the average group size is 6.95 members.

In total, Saskatchewan’s 394 groups (i.e., artist-entities having two or more members) have an active membership of 2,736. Thus, the artist segment of Saskatchewan’s music industry at present comprises some 2,896 “roles” for solo artists (160) and group members (2,736). It should be noted that these roles are not necessarily exclusive; for example, an individual who is a solo artist, as well as a member of a group would be counted twice, or designated as having two roles.

**Figure 3 GROUP SIZE**

Group make-up	Number of groups	Percent of artists
Solo artists	1,150	75%
2 members	46	3%
3 members	68	4%
4 members	140	9%
5 members	42	3%
6 members	49	3%
7 members	13	1%
8 members or more	36	2%
<b>Total</b>	<b>1,544</b>	<b>100%</b>

Note: Percentage totals may not equal 100% due to rounding.

## Economic impact analysis

The breadth of data gathered in this study allows for estimation of the total impact of the Saskatchewan music industry on the province's economy. This report section presents and describes economic impact indicators generated from the current study. Additional information on the methodology used in calculating such results is provided in *Appendix B: Study parameters* to this report.

### Summary of economic impact

Figure 4 below, summarizes the impact of the Saskatchewan music industry on the province's economy in 2007. Total economic impact figures for the industry are provided, along with a breakdown by industry role (artists and service providers). These figures are discussed further following Figure 4. Economic impact calculations were made using 2004 multipliers purchased from Statistics Canada. Further details are found in *Appendix B: Study parameters* to this report, under the heading *Economic impact analysis – method and rationale*.

**Figure 4 SUMMARY OF ECONOMIC IMPACT ON SASKATCHEWAN ECONOMY, 2007**

Economic measure		Artists	Service providers	Total
Total expenditures		\$15,436,524	\$65,892,709	\$81,329,233
Total expenditures in Saskatchewan		\$11,378,938	\$52,474,194	\$63,853,132
Total adjusted expenditures in Saskatchewan (purchaser prices) <sup>1</sup>		\$6,053,210	\$29,219,839	\$35,273,050
Margins and taxes <sup>2</sup>		\$1,768,761	\$4,071,154	\$5,839,915
Total adjusted expenditures in Saskatchewan (producer prices) <sup>1</sup>		\$4,284,449	\$25,148,685	\$29,433,135
Total direct impacts	GDP at market prices	\$2,691,543	\$16,847,791	\$19,539,334
	GDP at basic prices	\$2,654,237	\$16,723,094	\$19,377,331
	Government net revenues	\$37,305	\$124,697	\$162,003
	Saskatchewan total labour income	\$1,967,734	\$13,041,456	\$15,009,190
	Employment (person-years)	98.7	328.2	426.9
Total open (type I) impacts (direct + indirect)	GDP at market prices	\$4,013,219	\$22,146,515	\$26,159,734
	GDP at basic prices	\$3,970,476	\$22,029,319	\$25,999,795
	Government net revenues	\$42,743	\$117,197	\$159,940
	Saskatchewan total labour income	\$2,833,650	\$16,605,838	\$19,439,488
	Employment (person-years)	125.6	429.7	555.4
Total employment generated <sup>3</sup>		216.5	1,097.9	1,314.4

Note: For a definition of terms, please see the *Glossary of terms* that precedes this report section. Methodological considerations are discussed in *Appendix B*.

<sup>1</sup> The adjustments correct for double counting of expenditures, for example, in cases where expenditures of one industry participant go to another industry participant whose own expenditures are also recorded.

<sup>2</sup> This includes retail, wholesale and transportation margins as well as indirect taxes levied on the product. This amount is equal to the difference between purchaser and producer prices.

<sup>3</sup> Total employment generated is based on the number of employees working for music industry artists and service providers, plus direct and indirect spinoff-generated employment.

## Music industry expenditures

As the above figure shows, the Saskatchewan music industry spent \$81.3 million in 2007, of which \$63.9 million (79%) was spent in-province. Service providers typically spend a higher proportion of their expenditures in Saskatchewan (80%, or \$52.5 million out of \$65.9 million) than do artists (74%, or \$11.4 million out of \$15.4 million), though when only non-salary expenditures are considered, the share is 72% for both artists and service providers. Overall expenditures and the share spent outside Saskatchewan (“direct leakage”) are depicted in Figure 5 below.

Of the \$63.9 million spent in Saskatchewan, approximately \$28.6 million is spent with suppliers who are also members of the Saskatchewan music industry and \$35.3 million is spent with non-industry suppliers. Just over \$5.8 million is levied on top of the non-industry producers’ prices in the form of indirect taxes and retail, wholesale, and transportation margins. The net \$29.4 million of output supplied by these suppliers to the music industry generates the net economic impact that is measured in this report.

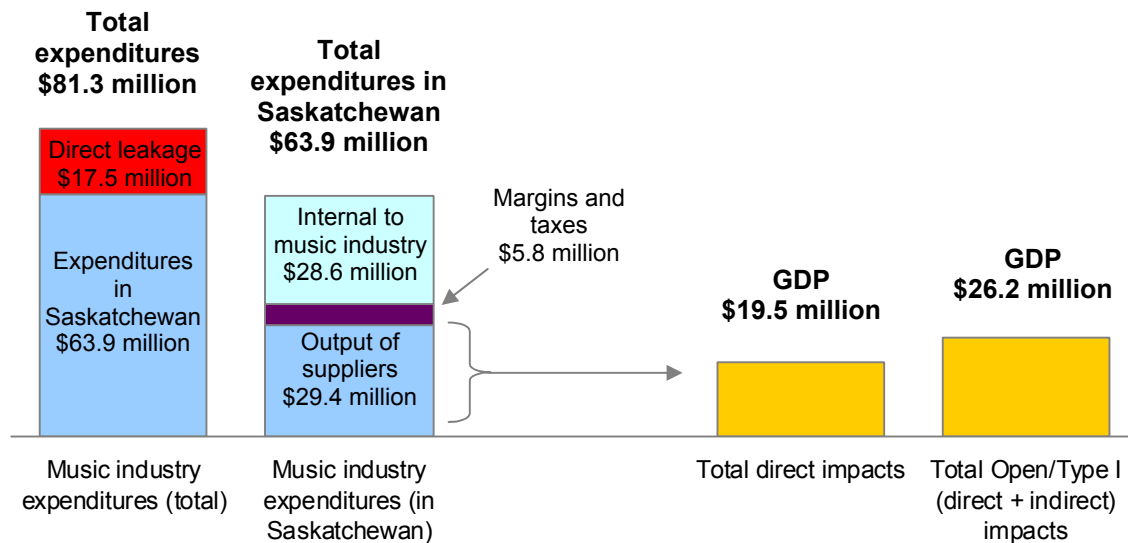
Considerable further detail on music industry expenditures is provided in the appropriate sections further on in this report (starting on page 23). Those sections immediately following this one describe in further detail the economic impact of the expenditures on the Saskatchewan economy.

**Impact on Saskatchewan GDP**

Spending in Saskatchewan produces both direct and indirect (or “spin-off”) effects that benefit the Saskatchewan economy. As shown in Figure 4 above, the sum of these effects (as a result of such spending) is a net positive impact of \$26.2 million on the province’s GDP. To put this figure in perspective, \$26.2 million represents about 0.05% of Saskatchewan’s 2007 GDP of \$50.96 billion (Saskatchewan Bureau of Statistics, *Economic Review 2007*, June 2008). These figures are shown in Figure 5, below.

Induced effects (consumer spending as a result of labour income) are not estimated for methodological reasons (see discussion in *Appendix B: Study parameters* to this report), though the consumer spending behind such effects undoubtedly produces additional benefits for the province’s GDP.

**Figure 5 GDP IMPACT OF EXPENDITURES BY SASKATCHEWAN’S MUSIC INDUSTRY, 2007**



Note: For a definition of terms, please see the *Glossary of terms* on page 8. Methodological considerations are discussed in *Appendix B: Study parameters*.

## Impact on labour income and employment

Most of the music industry's positive impact on GDP is the result of its effect on labour income (i.e., wages and salaries, employer-funded social benefits, and the income of unincorporated businesses). As shown in Figure 4, direct and indirect effects of music industry spending produce \$19.4 million in Saskatchewan labour income. This represents 74% of the industry's positive impact on GDP.

Employment generated by the industry totals 1,314 person-years when music industry employment is combined with the direct and indirect effects of its expenditures. Though not directly comparable, employment data for Saskatchewan (Saskatchewan Bureau of Statistics, *Monthly Statistical Review*, September 2008) shows 519,600 persons employed on average in August 2008.

**Impact of one dollar of spending by the Saskatchewan music industry**

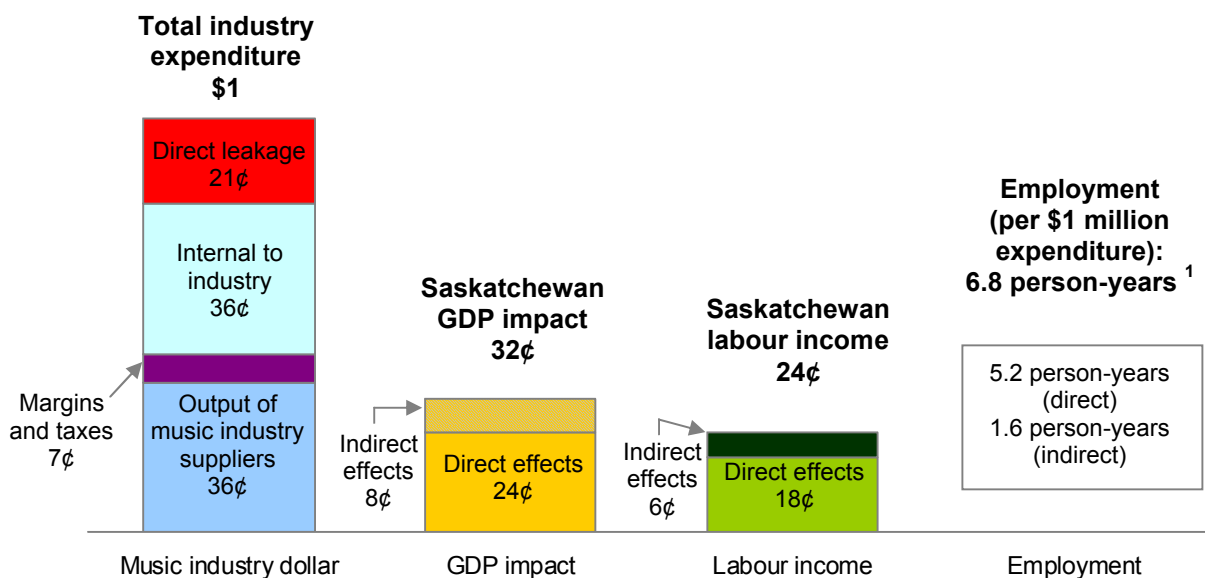
Figure 6, below, portrays the economic impact of a hypothetical \$1 expenditure by the Saskatchewan music industry, based on data presented above in Figure 4 and Figure 5.

On average, about 36¢ of every dollar spent by the industry benefits non-industry local suppliers and another 36¢ goes to other Saskatchewan music industry members. The remainder flows out of the province through direct leakage (21¢) or goes to taxes and margins (7¢). When direct and indirect economic impacts are taken into consideration, this increases Saskatchewan’s total GDP by 32¢.

The benefit of each \$1 expenditure in terms of Saskatchewan labour income (i.e., wages and salaries) is 24¢.

The number of jobs created by the industry is 6.8 person-years per \$1 million expenditure, not including those employed by the music industry itself.

**Figure 6 ECONOMIC IMPACT OF \$1 EXPENDITURE BY MUSIC INDUSTRY, 2007**



Note: For a definition of terms, please see the *Glossary of terms* on page 8. Methodological considerations are discussed in *Appendix B: Study parameters*. Totals may not equal the sum of their components due to rounding.

<sup>1</sup> Employment figures reflect the impact of a \$1 expenditure by the music industry and, as such, do not include employees of the industry itself (i.e., the employees of the music industry’s suppliers and of the music industry’s suppliers’ suppliers are included, but not those of the music industry itself). Employment per \$1 million expenditure is calculated by dividing the estimated employment impact by total industry expenditures, and then multiplying the result by \$1 million. Due to “employment” being measured in person-years rather than as a proportion of \$1 expenditure, it is not presented in bar graph format.



## Employment and wages in the Saskatchewan music industry

The following sections present employment and wage information related to the Saskatchewan music industry. This includes an estimate of employment in the industry (based on provided payroll data), earned wages in the industry (also based on payroll data), and a breakdown of organizations distributed according to average number of FTE employees.

It should be noted that the counts provided in this section are based on full-time equivalent employees (FTEs), which does not equate to *persons* so employed. For example, a business employing 100 persons at half-time rates would appear here as an employer of 50 FTEs. Also, because employment data is based on payroll data, it should be noted that only registered businesses (including both artists and service providers) provided data for this section.

### Employment in the industry

Figure 7 below provides a breakdown of music industry-related employment in the service provider category, and also includes artists (solo artists and groups) that are registered as businesses. This breakdown is based on respondent-provided payroll data. Some organizations have employment that is not specifically music-related; for such organizations, only music industry-related employment is included.

Venues employ 270 FTE positions, representing 36% of industry employment. Followed next are gear, instruments and media with 127 FTE positions (17%) and talent buyers with 120 FTE positions (16%). Artists employ 91 FTEs or 12% of industry employment. In total, the industry is estimated to employ 759 FTE positions.

**Figure 7 SASKATCHEWAN MUSIC INDUSTRY EMPLOYMENT (FTE) BY BUSINESSES**

Industry Role		Total		
		Average number of FTE employees	Total FTE employment	Percent of total industry employment
Artists		1	91	12%
Service providers	Accounting, consulting, writing and legal services	<1	7	<1%
	Booking agencies and management	2	19	4%
	Gear, instruments and media (sales, service and manufacturing)	3	37	17%
	Media, design, promotions and technical services	2	18	5%
	Music instructors	1	14	2%
	Music organizations	1	11	1%
	Production, publishing, distribution and record companies	2	26	5%
	Recording studios	1	17	3%
	Talent buyers	7	18	16%
	Venues	7	39	36%
<b>Total for industry</b>		<b>3</b>	<b>298</b>	<b>100%</b>

Note: The figures reported in this table are based on respondent-provided payroll data. Percentage totals may not equal 100% due to rounding.

### Percent of industry employment directly related to music

Figure 7 above shows only music industry-specific employment of the businesses and organizations in the Saskatchewan music industry. Information on the total employment of these businesses and organizations was also collected. For most industry role categories, FTE counts of total employment and FTE counts of music industry-specific employment are identical, though there are some notable exceptions.

For the average venue, 55% of their employment is directly related to music. This is not surprising, bearing in mind that most venues will have a number of non-music related employees, such as office managers, security, cleaning, or concession staff, whose work is required whether that venue's events are music-related or not.

The other two exceptions are the media, design, promotions and technical services segment and the accounting, consulting, writing and legal services segment. Although these segments provide services to the music industry, many employees in these categories (such as graphic designers, photographers, lawyers and accountants) have no necessary connection to music *per se*. Therefore, in these categories, it is understandable that only 47% and 26% respectively, of the average firm's employment is directly related to the music industry.

### Wages in the Saskatchewan music industry

The Saskatchewan music industry produced \$18.75 million in wages and salaries in the past year (see Figure 8 below; these reflect wages and salaries for music industry-specific employment only). Of this amount, most is from employment created by service providers, at \$17.9 million (96%), compared to just over \$812,000 from employment created by artists (4%). As Figure 7 above shows, artists generate 12% of FTEs in the industry; however, they only make 4% of the total industry wages.

The largest generators of wages and salaries in the industry, apart from venues (\$7.9 million, representing 42% of total industry wages), are talent buyers at over \$2.6 million (14% of total industry wages).

**Figure 8 SASKATCHEWAN MUSIC INDUSTRY WAGES AND SALARIES PAID BY BUSINESSES**

Industry Role	Total			
	Average wage or salary bill	Total wages and salaries	Percent of total industry wages	
Artists	\$8,904	\$812,707	4%	
Service providers	Accounting, consulting, writing and legal services	\$5,100	\$34,210	<1%
	Booking agencies and management	\$19,580	\$371,819	2%
	Gear, instruments and media (sales, service and manufacturing)	\$74,599	\$2,773,208	15%
	Media, design, promotions and technical services	\$78,997	\$1,444,066	8%
	Music instructors	\$84,667	\$1,198,804	6%
	Music organizations	\$31,140	\$348,768	2%
	Production, publishing, distribution and record companies	\$30,914	\$793,432	4%
	Recording studios	\$25,901	\$428,052	2%
	Talent buyers	\$143,732	\$2,633,539	14%
	Venues	\$200,458	\$7,912,980	42%
<b>Total for industry</b>	<b>\$62,972</b>	<b>\$18,751,584</b>	<b>100%</b>	

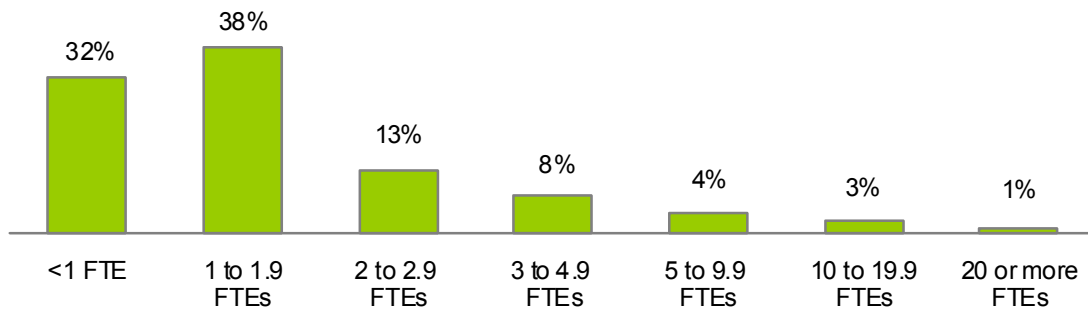
Note: The figures reported in this table are based on respondent-provided payroll data. Percentage totals may not equal 100% due to rounding.

**Distribution of full-time equivalent employment**

Figure 9 below presents the distribution of FTE employment as a percentage of businesses or organizations in the Saskatchewan music industry. Seven out of ten (70%) have less than two full-time equivalent positions and few have many more. The vast majority (91%) employ fewer than five FTEs.

Again, it should be remembered that “full-time equivalents” does not mean “full-time employees.” In Figure 9, for example, 70% of businesses report having less than two FTEs. This explains the finding for artists (which accounted for 91 FTEs – see Figure 7 above): many groups have several members who work part-time, but overall this is equivalent to very few full-time employees.

**Figure 9 BREAKDOWN OF EMPLOYMENT ON FTE BASIS**



Note: Percentage totals may not equal 100% due to rounding.

## Goods and Services Tax (GST) remittances and refunds

Survey respondents were asked to report on their GST remittance or refund for 2007. Service providers are more likely than artists to have had either a GST remittance or refund in 2007 (see Figure 10).

**Figure 10 GST REMITTANCES AND REFUNDS BY INDUSTRY ROLE**

Category	Remittance	Refund	No remittance or refund
Artists	31%	19%	50%
Service providers	49%	27%	24%
<b>Total for industry</b>	<b>41%</b>	<b>24%</b>	<b>35%</b>

Note: “Percent” refers to the percentage of total GST revenue earned.

Figure 11 below provides a summary of net GST remittances and refunds. Slightly over \$680,000 in GST remittances were generated in 2007 by the Saskatchewan music industry (see Figure 11). Of that amount, service providers generated 91%, while artists produced the remaining 9%. Lower income norms for artists may explain this finding.

**Figure 11 NET GOODS AND SERVICES TAX REMITTANCES BY INDUSTRY ROLE**

Category	Mean (\$)	Median (\$)	Total (\$)	Percent
Artists	\$586	\$0	\$63,652	9%
Service providers	\$4,566	\$0	\$618,604	91%
<b>Total for industry</b>	<b>\$2,795</b>	<b>\$0</b>	<b>\$682,256</b>	<b>100%</b>

Note: “Percent” refers to the percentage of total GST remittances.

## Industry revenues and expenditures

### Music industry overview

In 2007, the Saskatchewan music industry, as indicated by the following figures, played a significant role in the overall strength of the province's economy. This section of the report provides an overview of the Saskatchewan music industry's total revenue and expenditures. The table immediately below (Figure 12) shows the total estimated industry revenue generated by artists and service providers, in dollar amounts and total industry percentages.

Figure 13 shows an overview of total industry expenditures, broken out by general expense categories (outsourced professional services, office and business expenditures, equipment, travel and transportation, site or venue-related costs, and salary and wages). Figure 13 also shows the sub-total of all expenditures excluding salary and wages, as well as a grand total including salary and wages.

Readers should note that, unless otherwise indicated, all figures presented in the body of this report have been weighted to the estimated industry population size of 2,087. Furthermore, readers are not advised to make conclusions about the profits or losses of music industry participants based on the data presented herein: issues of sampling, margins of error, the inconsistency between firms' fiscal years and this study period, and the potential of one-time capital costs influencing expenditure figures make such conclusions inadvisable.

### Overview of music industry revenues

The total for all revenues generated by artists and service providers in 2007 is estimated at \$82.8 million (Figure 12).

As illustrated below, service providers (e.g., businesses and venues) received the most revenue: \$65.6 million, or approximately 79% of the total. Artists, on the other hand, received \$17.2 million each year, or approximately 21% of total industry revenue. It should be noted that industry funding (in the form of grants and government support, as well as loans and credit) is included in the calculation of artist and service provider revenue overall.

**Figure 12 OVERVIEW OF TOTAL INDUSTRY REVENUE**

Category	Total revenues	Percent
Service providers	\$65,632,338	79%
Artists	\$17,168,356	21%
<b>Total</b>	<b>\$82,800,695</b>	<b>100%</b>

Note: Revenue figures include financing and agency / government funding. Totals may not add up due to rounding.

**Overview of music industry expenditures**

The Saskatchewan music industry is an important contributor to economic activity. The estimated total of all expenditures for artists and service providers in 2007 is \$81.3 million (Figure 13).

Expenditures have been categorized as follows: outsourced professional services, office and other business expenditures, equipment, travel and transportation, site or venue-related costs and salaries/wages. Results are shown in Figure 13, below.

The largest share of music industry expenditures in Saskatchewan comes from outsourced professional services (\$25.1 million) followed by salary and wages at \$18.8 million; and office and other business expenditures (\$13.6 million).

Service providers' expenditures, at \$65.9 million, exceed those of artists (\$15.4 million) overall and in each category.

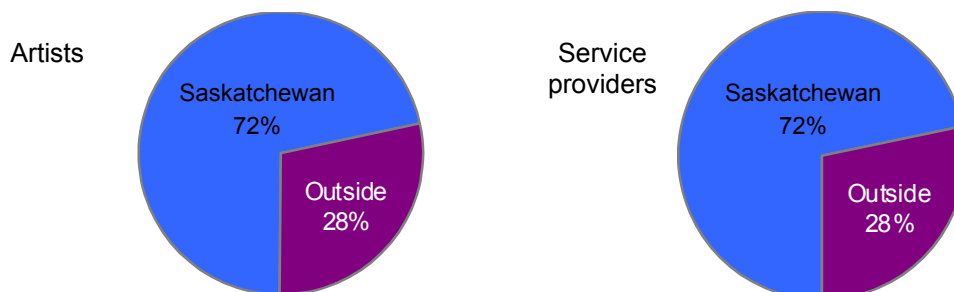
Figure 14 shows the share of non-salary expenditures of artists and service providers that were spent in Saskatchewan. Service providers typically purchase the same share of their expenditures in Saskatchewan as do artists (72%).

A detailed breakdown of expenditures by category is provided in the sections that follow, as well as a breakdown of the percentage of expenditures spent directly in Saskatchewan.

**Figure 13 OVERVIEW OF TOTAL INDUSTRY EXPENDITURES**

Expense category	Artists	Service providers	Total
Outsourced professional services	\$5,885,755	\$19,204,300	\$25,090,055
Office and other business expenditures	\$2,046,217	\$11,536,971	\$13,583,188
Equipment	\$3,011,212	\$6,817,540	\$9,828,752
Travel and transportation	\$3,680,634	\$3,704,529	\$7,385,163
Site or venue-related costs	\$0	\$6,690,493	\$6,690,493
<b>Subtotal</b>	<b>\$14,623,817</b>	<b>\$47,953,832</b>	<b>\$62,577,650</b>
Salary and wages	\$812,707	\$17,938,877	\$18,751,584
<b>Grand total</b>	<b>\$15,436,524</b>	<b>\$65,892,709</b>	<b>\$81,329,233</b>

**Figure 14 TOTAL NON-SALARY EXPENDITURES – PERCENTAGE SPENT IN SASKATCHEWAN**



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Figure 15 below shows the relative proportions of artists and service providers across various brackets of revenue and expenditure. Not surprisingly, only a small percentage (5%) of artists had revenues over \$50,000 in 2007, whereas a greater proportion (30%) of service providers did. Similarly, a much larger proportion of service providers (53%) had expenditures (including salaries/wages) over \$10,000 in 2007, whereas only 24% of artists had expenditures that high.

**Figure 15 REVENUE AND EXPENDITURE LEVELS**

	Revenues		Expenditures (excluding salary and wages)		Expenditures (including salary and wages)	
	Artists	Service providers	Artists	Service providers	Artists	Service providers
None	12%	5%	6%	8%	6%	7%
\$1 to \$500	17%	12%	14%	11%	14%	11%
\$501 to \$1,000	9%	2%	9%	3%	9%	3%
\$1,001 to \$5,000	24%	20%	38%	19%	37%	16%
\$5,001 to \$10,000	16%	8%	10%	12%	10%	10%
\$10,001 to \$50,000	17%	23%	20%	24%	21%	24%
\$50,001 to \$100,000	3%	12%	2%	8%	2%	8%
\$100,001 to \$500,000	2%	14%	2%	13%	2%	16%
\$500,001 to \$1,000,000	0%	2%	0%	1%	0%	3%
\$1,000,001 to \$5,000,000	0%	3%	0%	2%	0%	3%
<b>Total</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Note: Percentage totals may not equal 100% due to rounding.

## Artist revenues

This section examines artist revenue from sales and performances (Figure 16) and artist revenue from music industry services (Figure 17). Figure 16 shows the relationship between various sources of revenue in the area of sales/performance, ranging from major sources such as live performance fees and recording/distribution deals, to minor ones such as synch and licensing fees. Figure 17 indicates revenues received by artists from providing music industry related services, such as teaching, promoting, managing, or producing other artists.

Artist revenues from sales/performances and from music industry services were responsible for nearly \$14.5 million out of \$17.2 million received in 2007, with the balance coming from industry funding (grants and government support) and artist loans / credit.



**Artist revenues – sales/performance**

By far the biggest source of artist revenue is live performance fees, which, at \$9.6 million, is more than eight times the amount from the next largest source, selling or distributing CDs, tapes, or other recordings (\$1.2 million). In total, 74% of artists received live performance fees, which account for 71% of all artist sales/performance revenues.

The only other sales/performance-related source that yielded more than \$1 million for artists in 2007 is payments from performing rights organizations, such as SOCAN (\$1.1 million).

All other sales/performance revenue sources combined account for approximately 12% of total artist revenues (see Figure 16).

**Figure 16 ARTIST REVENUES – SALES/PERFORMANCE**

Source of revenue	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Live performance fees	74%	\$8,395	\$2,500	\$9,614,031	71%
Selling or distributing CDs, tapes, or other recordings	31%	\$2,503	\$500	\$1,192,270	9%
Payments from performing rights organizations such as SOCAN, BMI or ASCAP	16%	\$4,384	\$300	\$1,111,547	8%
Speaking engagements, workshops or other training	10%	\$2,742	\$1,500	438,711	3%
Commissions or fees for composing music or lyrics or other publishing revenue	6%	\$4,570	\$2,000	\$385,060	3%
Selling promotional merchandise	11%	\$1,935	\$400	\$341,036	3%
Fees from radio/television performances, or film/video broadcasts	15%	\$1,305	\$500	294,775	2%
Royalties from your record sales	4%	\$957	\$270	\$58,723	<1%
Winnings from songwriting or talent contests	1%	\$1,735	\$633	\$35,356	<1%
Synch fees and licensing fees	2%	\$772	\$610	\$17,930	<1%
Mechanical royalties	2%	\$437	\$400	\$11,047	<1%
An advance on a record or distribution deal	<1%	\$2,500	\$2,500	\$8,144	<1%
<b>Total</b>	<b>83%</b>	<b>\$10,535</b>	<b>\$3,125</b>	<b>\$13,508,629</b>	<b>100%</b>

Note: “Frequency” refers to the percentage of artists who reported receiving revenue from the source indicated. Percentages in the Frequency column, when summed, may exceed the total shown because multiple responses were accepted. Totals in the “Percent of total” column may not equal 100% due to rounding. Amounts less than 0.5% are shown as <1%.

**Artist revenues – music industry services**

Of the total \$17.1 million artist revenue in 2007, \$957,000 came from music industry services provided by artists to other artists. As a whole, services to other artists account for a much lower percentage of total revenue earned by Saskatchewan artists than do revenues earned directly through sales and performance. However, although total service-related revenues are less than sales/performance revenues, many artists are actively providing revenue-producing music industry services (see Figure 17).

The largest source of service-related revenue is teaching music, which produced \$276,703 in 2007, followed by per diems or salary from a record label or group (\$212,945) and managing an artist other than themselves (\$188,869). Revenues in the remaining sub-categories are considerably less. Artists reported no revenue from producing promotional merchandise for an artist other than themselves, rental income from a venue, manufacturing another artist’s sound recording, publishing or licensing another artist’s music or fees from music therapy.

**Figure 17 ARTIST REVENUES – MUSIC INDUSTRY SERVICES**

Source of revenue	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Teaching music	5%	\$3,605	\$2,500	\$276,703	29%
Per diems or salary from your record label or group	3%	\$4,829	\$750	\$212,945	22%
Managing an artist other than yourself	1%	\$8,567	\$500	\$188,869	20%
Engineering, mastering or producing another artist’s sound recording	<1%	\$3,298	\$2,479	\$62,518	7%
Technical services like doing sound, lighting or production for live music performances	1%	\$3,539	\$5,985	\$49,071	5%
Registration, processing or membership fees	<1%	\$14,200	\$14,200	\$46,257	5%
Professional services, like website design, legal or accounting services	2%	\$1,469	\$500	\$37,168	4%
Sponsorship or advertising for live performances	2%	\$1,128	\$400	\$32,221	3%
Commissions for providing talent for a live music venue or festival	1%	\$1,650	\$200	\$29,901	3%
Operating a sound recording studio	1%	\$7,000	\$7,000	\$7,000	1%
Fees paid for adjudicating at a music festival or contest	1%	\$600	\$600	\$4,409	<1%
Renting out rehearsal space or studio space	1%	\$400	\$400	\$2,940	<1%
Distributing another artist’s sound recording	1%	\$400	\$400	\$2,940	<1%
Manufacturing, renting, selling, repairing or servicing music instruments or accessories	<1%	\$700	\$700	\$2,280	<1%
Arranging other artists’ music	1%	\$120	\$70	\$1,882	<1%
<b>Total</b>	<b>15%</b>	<b>\$4,242</b>	<b>\$1,500</b>	<b>\$957,104</b>	<b>100%</b>

Note: “Frequency” refers to the percentage of artists who reported receiving revenue from the source indicated. Percentages in the Frequency column, when summed, may exceed the total shown because multiple responses were accepted. Totals in the “Percent of total” column may not equal 100% due to rounding. Amounts of less than 0.5% are shown as <1%.

## Artist expenditures

This section describes artist expenditures, categorized as equipment, travel/transportation, outsourced professional services and office or other business expenditures.

Artist expenditures total over \$15.4 million *including* salaries and wages, or \$14.6 million when salaries/wages are left out. Artists spent the most on outsourced professional services: nearly \$5.9 million.

Excluding salaries/wages, the second largest expense for artists is travel and transportation (approximately \$3.7 million), followed by equipment (over \$3 million) and office and other business expenditures (over \$2 million).

In the past year, artists allocated over \$812,000 toward salaries/wages, which is less than that allocated to any other expense category.

### Artist expenditures – equipment

Artist expenditures on equipment amounted to more than \$3 million in 2007, which is approximately 21% of total artist expenditures overall, excluding salary and wages. Artists are responsible for 31% of total equipment expenditures in the music industry.

The heaviest equipment expenditure area for artists, as one might anticipate, is direct spending on musical instruments and accessories (\$1.2 million), followed by live sound reinforcement and P.A. or lighting equipment and accessories (over \$484,000) and recording equipment and accessories (nearly \$460,000).

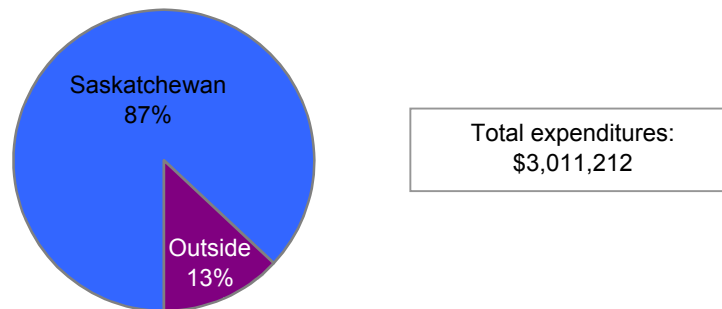
**Figure 18 ARTIST EXPENDITURES – EQUIPMENT**

Source of expenditures	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Musical instruments and accessories	41%	\$1,954	\$1,000	\$1,246,010	41%
Live sound reinforcement and P.A. or lighting equipment and accessories	21%	\$1,465	\$600	\$484,828	16%
Recording equipment and accessories, including recorders, mixers, etc.	23%	\$1,313	\$400	\$458,947	15%
Specialized hardware and software, including interfaces, controllers, etc.	17%	\$1,022	\$600	\$270,091	9%
Equipment and musical instrument repair and maintenance	42%	\$412	\$200	\$270,003	9%
Tents, staging, halls, building or other venue rentals	9%	\$973	\$400	\$141,214	5%
DJ equipment and accessories, such as CD or MP3 players, turntables, effects, etc.	6%	\$835	\$400	\$75,629	3%
Video software and editing equipment	2%	\$1,260	\$150	\$30,840	1%
Photographic equipment	4%	\$430	\$400	\$27,744	1%
CD duplication machinery	2%	\$233	\$176	\$5,903	0%
<b>Total</b>	<b>72%</b>	<b>\$2,693</b>	<b>\$1,200</b>	<b>\$3,011,212</b>	<b>100%</b>

Note: “Frequency” refers to the percentage of artists who reported expenditure in the area indicated. Percentages in the Frequency column, when summed, may exceed the total shown because multiple responses were accepted. Totals in the “Percent of total” column may not equal 100% due to rounding. Amounts of less than 0.5% are shown as <1%.

The majority of equipment expenditures were spent within Saskatchewan (87%, see Figure 19).

**Figure 19 ARTIST EQUIPMENT EXPENDITURES – PERCENT IN SASKATCHEWAN**



**Artist expenditures – travel and transportation**

Artists reported spending almost \$3.7 million on travel and transportation in 2007. This represents one-half of the entire industry’s travel and transportation expenditures (50%), and 25% of overall artist expenditures (excluding salary and wages).

Of the various subcategories of expenditures under this heading, the leader is vehicle operation, repair, and maintenance (\$1.4 million) followed by passenger/cargo vehicle purchase, rental, or leasing (\$875,000), then out-of-town food and hospitality (see Figure 20).

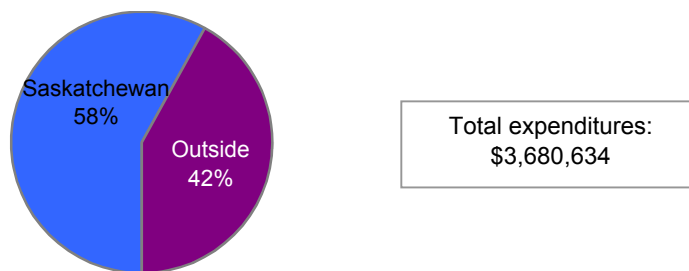
**Figure 20 ARTIST EXPENDITURES – TRAVEL AND TRANSPORTATION**

Source of expenditures	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Vehicle operation, repair and maintenance, including registration, insurance, gas and oil	59%	\$1,572	\$500	\$1,437,342	39%
Passenger or cargo vehicle/trailer purchase, rental, or leasing	11%	\$4,985	\$1,400	\$875,083	24%
Out-of-town food and hospitality	35%	\$938	\$275	\$502,331	14%
Airfare	13%	\$1,933	\$1,691	\$391,679	11%
Hotel, motel or other accommodations	19%	\$931	\$500	\$271,923	7%
Conference and showcase fees	11%	\$486	\$250	\$83,097	2%
Bus, taxi, and other ground transportation fares	10%	\$415	\$215	\$66,745	2%
Shipping charges associated with out-of-town equipment needs	4%	\$353	\$200	\$24,145	1%
Parking charges and toll fees	10%	\$123	\$50	\$19,029	1%
Visa or work permit fees	1%	\$417	\$300	\$9,261	0%
<b>Total</b>	<b>66%</b>	<b>\$3,630</b>	<b>\$884</b>	<b>\$3,680,634</b>	<b>100%</b>

Note: “Frequency” refers to the percentage of artists who reported expenditure in the area indicated. Percentages in the Frequency column, when summed, may exceed the total shown because multiple responses were accepted. Totals in the “Percent of total” column may not equal 100% due to rounding. Amounts of less than 0.5% are shown as <1%.

Just over one-half of travel and transportation-related artist expenditures (58%) remained in Saskatchewan (see Figure 21).

**Figure 21 ARTIST TRAVEL / TRANSPORTATION EXPENDITURES – PERCENT IN SASKATCHEWAN**



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**Artist expenditures – outsourced professional services**

Artist expenditures on outsourced professional services amounted to nearly \$5.9 million in 2007, close to one-quarter (23%) of what the entire Saskatchewan music industry spent in this area. Expenditures on outsourced professional services represent 38% of all artist expenditures.

Figure 22 below shows these expenditures broken down into subcategories. The largest is session players, sidemen, roadies, lighting/sound/merchandise, or other crew at \$1.3 million followed by CD/DVD/tape recording or production, at \$1.1 million.

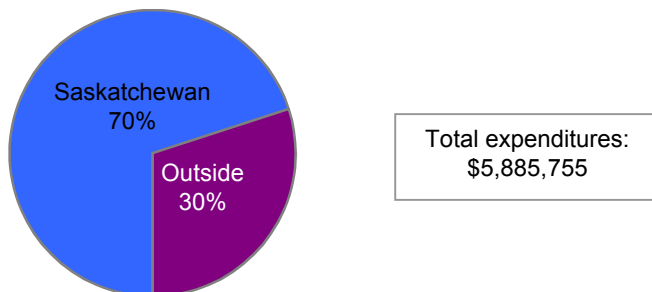
**Figure 22 ARTIST EXPENDITURES – OUTSOURCED PROFESSIONAL SERVICES**

Source of expenditures	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Session players, sidemen, roadies, lighting / sound / merchandise or other crew	16%	\$5,181	\$1,000	\$1,311,491	22%
CD / DVD / tape recording or production	18%	\$3,957	\$2,400	\$1,124,005	19%
Agency fees and management fees	6%	\$7,276	\$1,500	\$659,303	11%
Contracted professional services	9%	\$4,794	\$500	\$655,791	11%
Fees for advertising, promotion, and publicity	21%	\$1,519	\$300	\$481,210	8%
CD / DVD / tape manufacturing	14%	\$2,025	\$1,500	\$431,508	7%
Fees for grooming, image consulting, wardrobe purchase and upkeep	21%	\$836	\$500	\$271,414	5%
Fees for graphics, web design video, or photography	15%	\$817	\$600	\$194,336	3%
Professional fundraising or sales	<1%	\$46,000	\$46,000	\$149,846	3%
Vocal or instrumental coaching and other professional development fees	13%	\$679	\$400	\$133,024	2%
Merchandise purchase, including equipment purchases for resale	5%	\$1,474	\$1,000	\$102,404	2%
Union or other trade association dues	31%	\$200	\$150	\$95,974	2%
Legal and accounting services	12%	\$396	\$250	\$72,921	1%
Sheet music and music books	21%	\$223	\$102	\$70,552	1%
Merchandise production	4%	\$769	\$800	\$45,140	1%
Fees for commissioning a music composition or lyrics	1%	\$1,573	\$400	\$34,687	1%
Non-travel related accommodation and hospitality	2%	\$789	\$225	\$27,669	<1%
Set dressing and design	2%	\$720	\$665	\$24,481	<1%
<b>Total</b>	<b>65%</b>	<b>\$5,862</b>	<b>\$1,000</b>	<b>\$5,885,755</b>	<b>100%</b>

Note: “Frequency” refers to the percentage of artists who reported expenditure in the area indicated. Percentages in the Frequency column, when summed, may exceed the total indicated because multiple responses were accepted. Totals in the “Percent of total” column may not equal 100% due to rounding. Amounts of less than 0.5% are shown as <1%.

As Figure 23 below illustrates, 70% of artist expenditures on outsourced professional services stayed in Saskatchewan, while 30% went outside the province.

**Figure 23 ARTIST PROFESSIONAL SERVICES EXPENDITURES – PERCENT IN SASKATCHEWAN**



**Artist expenditures – office and other business expenditures**

Artist office and other business expenditures were slightly more than \$2 million in 2007, which is 13% of artist expenditures overall (excluding salary and wages), and 15% of office and business expenditures for the entire industry.

Of that \$2 million, the largest share (almost \$478,000, or 23%) went toward common office expenditures, such as paper, postage, and website hosting. Rent (including utilities) is another major expense, at nearly \$400,000. Tapes, CDs, DVDs, records and video purchases took some \$300,000 of artist spending on common office expenditures.

**Figure 24 ARTIST EXPENDITURES – OFFICE AND BUSINESS EXPENDITURES**

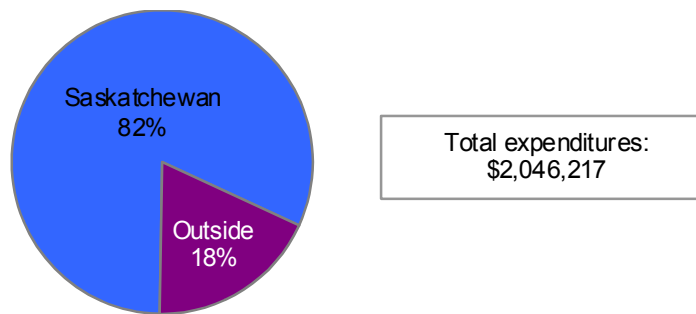
Source of expenditures	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Common office expenditures like paper, postage, Internet, website hosting, etc.	46%	\$678	\$300	\$477,727	23%
Rent including utilities	15%	\$1,730	\$1,200	\$394,117	19%
Tapes, CDs, DVDs, records and video purchases	34%	\$567	\$200	\$299,069	15%
Bank and other financial service fees including loan or credit card interest	15%	\$902	\$200	\$215,014	11%
Marketing costs, including press kits	11%	\$1,131	\$300	\$184,699	9%
All insurance costs	19%	\$519	\$300	\$153,373	7%
Computers	10%	\$912	\$700	\$137,003	7%
Application fees or submission fees (for Sonicbids, etc.)	15%	\$277	\$200	\$63,061	3%
Artist label CD purchases	4%	\$811	\$100	\$43,685	2%
Project grants, operating grants, awards or bursaries	<1%	\$7,000	\$7,000	\$22,803	1%
Office furniture	4%	\$387	\$154	\$22,448	1%
Online retail fees such as for processing or shipping	8%	\$82	\$50	\$10,010	<1%
Licensing fees	2%	\$350	\$95	\$9,693	<1%
Duty, brokerage and import fees	2%	\$177	\$200	\$6,371	<1%
Sponsorship or donation	1%	\$500	\$500	\$3,674	<1%
Funding and advance recoupment	<1%	\$2,000	\$2,000	\$2,000	<1%
Artist fees	1%	\$200	\$200	\$1,470	<1%
<b>Total</b>	<b>66%</b>	<b>\$1,999</b>	<b>\$700</b>	<b>\$2,046,217</b>	<b>100%</b>

Note: “Frequency” refers to the percentage of artists who reported expenditure in the area indicated. Percentages in the Frequency column, when summed, may exceed the total shown because multiple responses were accepted. Totals in the “Percent of total” column may not equal 100% due to rounding. Amounts of less than 0.5% are shown as <1%.



The majority of office expenditures, 82%, remained in Saskatchewan (see Figure 25).

**Figure 25 ARTIST OFFICE EXPENDITURES – PERCENT IN SASKATCHEWAN**



## Service provider revenues

Figure 26 below shows total service provider revenues by type of revenue. Service providers in the Saskatchewan music industry received \$57.1 million in overall revenue in 2007. Readers should note that this amount excludes funding and financing revenues that, when added to this amount, increase total service provider revenues to \$65.6 million (see *Sources of Financing* section of this report for more information).

Manufacturing, renting, selling, repairing, or servicing music instruments/accessories, at over \$16.8 million, or 29%, was the largest source of service provider revenues for 2007. The second biggest source was parking, food and refreshment income from live performances (\$8.1 million), followed by teaching music (\$6.9 million) and managing, booking, or promoting an artist (\$6.6 million).

**Figure 26 SERVICE PROVIDER REVENUES**

Source of revenue	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Manufacturing/renting/selling/repairing/servicing instruments	20%	\$153,050	\$10,000	\$16,837,990	29%
Parking, food, refreshment or other income from live performances	10%	\$76,782	\$9,140	\$8,143,653	14%
Teaching music	42%	\$30,488	\$3,853	\$6,911,843	12%
Managing, booking, promoting an artist	18%	\$67,513	\$5,700	\$6,643,683	12%
Agency fees	1%	\$64,062	\$32,352	\$3,394,555	6%
Technical services such as sound, lighting or production	22%	\$23,504	\$1,102	\$2,755,239	5%
Manufacturing another artist's sound recording	4%	\$108,428	\$9,000	\$2,562,794	4%
Operating a sound recording studio	13%	\$33,332	\$2,000	\$2,263,606	4%
Engineering/producing another artist's sound recording	12%	\$30,613	\$3,000	\$1,943,023	3%
Sponsorship or advertising for live performances	7%	\$48,105	\$3,839	\$1,794,688	3%
Professional services, (e.g., design, legal, marketing)	13%	\$16,434	\$1,351	\$1,153,899	2%
Commissions for providing talent for a music venue/festival	6%	\$20,093	\$6,191	\$601,781	1%
Producing promo merchandise for another artist	8%	\$11,276	\$2,781	\$514,127	1%
Arranging other artists' music	11%	\$8,507	\$1,000	\$498,705	1%
Publishing/licensing another artist's music	5%	\$17,849	\$3,000	\$441,537	1%
Rental income from venue/facility	8%	\$10,140	\$3,000	\$420,366	1%
Registration/processing/membership fees	4%	\$10,088	\$2,178	\$234,182	<1%
Distributing another artist's sound recording	5%	\$7,561	\$4,000	\$187,632	<1%
Renting out rehearsal space	6%	\$3,640	\$1,951	\$113,553	<1%
Fees for adjudication at a music festival or contest	1%	\$11,000	\$11,000	\$42,747	<1%
Building improvement fees	1%	\$7,000	\$7,000	\$22,155	<1%
Ticket sales for live music	20%	\$1,000	\$1,000	\$3,152	<1%
Per diems or salary from your record label or group	1%	\$800	\$800	\$2,832	<1%
Other	<1%	\$355	\$355	\$795	<1%
<b>Total</b>	<b>94%</b>	<b>\$111,720</b>	<b>\$15,500</b>	<b>\$57,113,536</b>	<b>100%</b>

Note: "Frequency" refers to the percentage of service providers who reported receiving revenue from the source indicated. Percentages in the Frequency column, when summed, may exceed the total shown because multiple responses were accepted. Total percentage in the "Percent of total" column may not equal 100% due to rounding. Figures of less than 0.5% are shown as <1%.

## Service provider expenditures

This section describes service provider expenditures in the areas of equipment, travel and transportation, outsourced professional services, office and other business expenditures and site-related costs.

Service provider expenditures total \$65.9 million *including* salaries and wages, and \$48 million when salaries/wages are not counted. Service providers spent the most, just as artists did, on outsourced professional services (\$19.2 million). Other major service provider expenditures were salaries and wages (\$17.9 million) and office and other business expenditures (\$11.5 million).

### Service provider expenditures – equipment

Service providers reported spending \$6.8 million on equipment in 2007 (see Figure 27). Live sound reinforcement and P.A./lighting equipment and accessories account for more than one-third of equipment expenditures (36%) at \$2.4 million. This is followed by tents, staging, halls, buildings, or other venue rentals (\$1.1 million) and specialized software and hardware (\$1 million).

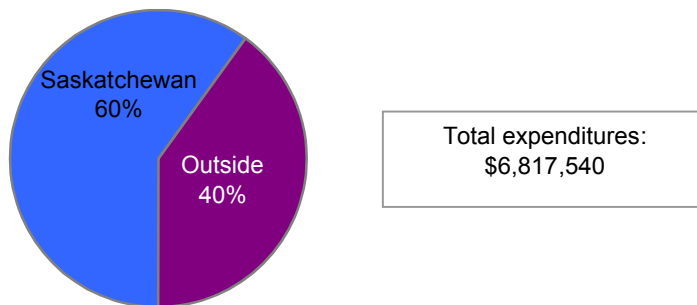
**Figure 27 SERVICE PROVIDER EXPENDITURES – EQUIPMENT**

Source of expenditures	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Live sound reinforcement and P.A./lighting equipment	25%	\$17,739	\$1,514	\$2,430,000	36%
Tents, staging, halls, building or other venue rentals	20%	\$10,316	\$2,800	\$1,092,923	16%
Specialized software and hardware, including interfaces etc.	22%	\$8,591	\$2,000	\$1,041,505	15%
Other musical instruments and accessories	25%	\$6,087	\$2,146	\$828,827	12%
Recording equipment and accessories	24%	\$4,784	\$1,668	\$626,007	9%
Equipment and musical instrument repair and maintenance	30%	\$1,454	\$500	\$232,262	3%
DJ equipment and accessories	14%	\$2,494	\$766	\$189,692	3%
Video software and editing equipment	5%	\$6,514	\$1,000	\$183,021	3%
CD duplication machinery	5%	\$5,209	\$6,131	\$130,192	2%
Photographic equipment	11%	\$1,033	\$500	\$63,109	1%
<b>Total</b>	<b>72%</b>	<b>\$17,563</b>	<b>\$3,000</b>	<b>\$6,817,540</b>	<b>100%</b>

Note: “Frequency” refers to the percentage of service providers who reported expenditure in the area indicated. Percentages in the Frequency column, when summed, may exceed the total shown because multiple responses were accepted. Totals in the “Percent of total” column may not equal 100% due to rounding. Figures of less than 0.5% are shown as <1%.

Sixty percent of service provider equipment expenditures (60%) stayed in Saskatchewan (see Figure 28).

**Figure 28 SERVICE PROVIDER EQUIPMENT EXPENDITURES – PERCENT IN SASKATCHEWAN**



**Service provider expenditures – travel and transportation**

Service provider expenditures on travel and transportation were about \$3.7 million in 2007, which is one-half (50%) of travel and transportation costs for the Saskatchewan music industry overall.

As Figure 29 shows, the largest amount in this category was spent on hotel, motel and other accommodations (\$750,000), followed by conference and showcase fees (\$730,000) and vehicle operation, repair, maintenance, registration and insurance (more than \$660,000). Each of these categories accounts for approximately one-fifth of service provider travel and transportation costs.

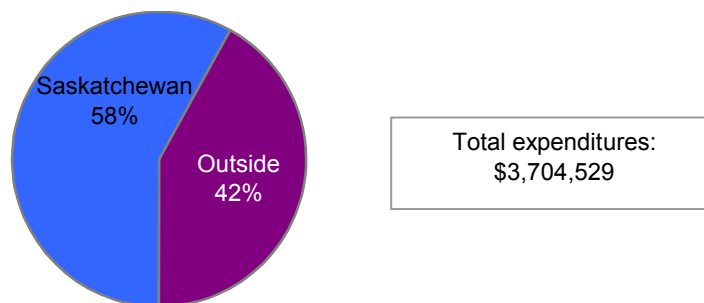
**Figure 29 SERVICE PROVIDER EXPENDITURES – TRAVEL AND TRANSPORTATION**

Source of expenditures	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Hotel, motel or other accommodations	32%	\$4,298	\$1,000	\$748,520	20%
Conference and showcase fees	15%	\$8,910	\$510	\$728,707	20%
Vehicle operation/repair/maintenance/registration/insurance	45%	\$2,765	\$1,707	\$666,744	18%
Airfare	17%	\$5,764	\$2,000	\$531,674	14%
Passenger, cargo vehicle or trailer purchase, rental or lease	12%	\$6,630	\$1,644	\$431,601	12%
Out-of-town food and hospitality	28%	\$2,424	\$500	\$365,926	10%
Bus, taxi or other ground transportation fares	17%	\$1,691	\$300	\$155,653	4%
Shipping fees associated with travel and touring	4%	\$1,878	\$1,000	\$39,535	1%
Visa or work permit fees	2%	\$1,422	\$200	\$18,281	0%
Parking charges or toll fees	15%	\$224	\$100	\$17,888	0%
<b>Total</b>	<b>59%</b>	<b>\$11,525</b>	<b>\$3,000</b>	<b>\$3,704,529</b>	<b>100%</b>

Note: “Frequency” refers to the percentage of service providers who reported expenditure in the area indicated. Percentages in the Frequency column, when summed, may exceed the total shown because multiple responses were accepted. Totals in the “Percent of total” column may not equal 100% due to rounding. Figures of less than 0.5% are shown as <1%.

Approximately three-fifths (58%) of service providers’ travel and transportation expenditures were made in Saskatchewan (see Figure 30).

**Figure 30 SERVICE PROVIDER TRAVEL / TRANSPORTATION EXPENDITURES – PERCENT IN SASKATCHEWAN**



**Service provider expenditures – outsourced professional services**

As seen in Figure 31 below, service providers spent \$19.2 million on outsourced professional services, which constituted 77% of total music industry expenditure on these services in 2007. Outsourced professional service expenditures related to the music industry represent the largest segment of Saskatchewan service provider expenditures.

Service providers spent the most on merchandise purchases (\$5.3 million, and 27% of outsourced professional services). The next largest categories are contracted professional services (\$3.4 million) and agency/management fees (\$3.4 million).

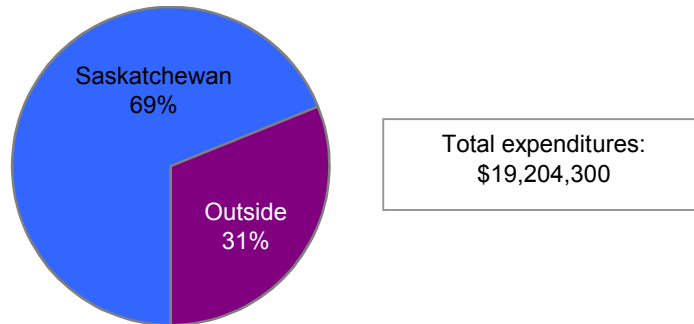
**Figure 31 SERVICE PROVIDER EXPENDITURES – OUTSOURCED PROFESSIONAL SERVICES**

Source of expenditures	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Merchandise purchase including equipment purchase for resale	12%	\$81,672	\$5,111	\$5,274,053	27%
Contracted professional services	19%	\$33,023	\$4,000	\$3,423,349	18%
Agency fees and management fees	2%	\$286,217	\$1,000	\$3,390,920	18%
Session players, sidemen, roadies, lighting/sound/merchandise crew	18%	\$17,864	\$5,000	\$1,738,691	9%
CD/DVD/tape manufacturing	8%	\$33,930	\$1,400	\$1,484,201	8%
Fees for advertising/promo/publicity	28%	\$9,109	\$2,656	\$1,405,504	7%
Merchandise production	2%	\$100,000	\$100,000	\$1,105,834	6%
Legal and accounting services	28%	\$1,592	\$913	\$244,827	1%
Non-travel related accommodation and hospitality	10%	\$3,866	\$1,469	\$215,204	1%
Fees for graphics, web design, video and photography	16%	\$2,339	\$513	\$203,212	1%
Fees paid for commissioning a music composition or lyrics	3%	\$11,310	\$3,606	\$201,814	1%
CD/DVD/tape recording or production	6%	\$5,104	\$2,200	\$176,790	1%
Sheet music and books	20%	\$1,161	\$300	\$125,619	1%
Set dressing and design	2%	\$6,202	\$8,874	\$56,663	<1%
Union or other trade association dues	29%	\$270	\$185	\$42,114	<1%
Fees for grooming/image consulting/ wardrobe purchase/upkeep	6%	\$1,062	\$500	\$36,806	<1%
Professional fundraising or sales	<1%	\$29,500	\$29,500	\$35,400	<1%
Volunteer remuneration	1%	\$3,156	\$2,039	\$18,246	<1%
Translation fees	2%	\$1,713	\$1,000	\$13,866	<1%
Vocal/instrument coaching and other professional development fees	4%	\$509	\$296	\$11,190	<1%
<b>Total</b>	<b>70%</b>	<b>\$50,647</b>	<b>\$3,079</b>	<b>\$19,204,300</b>	<b>100%</b>

Note: “Frequency” refers to the percentage of service providers who reported expenditure in the area indicated. Percentages in the Frequency column, when summed, may exceed the total indicated because multiple responses were accepted. Totals in the “Percent of total” column may not equal 100% due to rounding.

Just like artists, most of what service providers spent on outsourced professional services was spent locally (69%; see Figure 32).

**Figure 32 SERVICE PROVIDER PROFESSIONAL SERVICES EXPENDITURES – PERCENT IN SASKATCHEWAN**



### Service provider expenditures – office and other business expenditures

Service providers spent more than \$11.5 million on office and other business expenditures in 2007, or 85% of the total under that heading.

Within the category of office and other business expenditures, service providers spent the most on artist fees, at \$6.7 million. Talent, technical and producer fees are next highest expense, at roughly \$3.3 million.

**Figure 33 SERVICE PROVIDER EXPENDITURES – OFFICE AND BUSINESS EXPENDITURES**

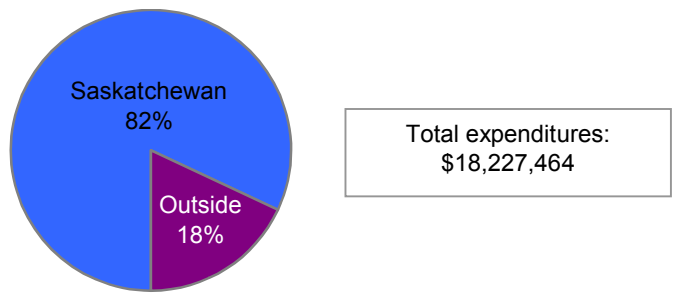
Source of expenditures	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Artist fees	10%	\$120,256	\$35,000	\$6,728,039	37%
Talent/technical/producer fees	6%	\$112,273	\$30,000	\$3,327,508	18%
Rent including utilities	36%	\$6,649	\$3,600	\$1,301,929	7%
Common office expenses	68%	\$3,129	\$1,000	\$1,154,218	6%
Marketing/advertising/promo related to live performances	7%	\$23,728	\$3,916	\$867,370	5%
Building renovation, maintenance or construction costs	2%	\$105,733	\$150,000	\$838,376	5%
Marketing costs (incl. press kits)	8%	\$13,371	\$500	\$593,562	3%
Backline/sound/lights/other prod. expenses (excl. labour)	3%	\$35,519	\$29,003	\$555,755	3%
All insurance costs	35%	\$2,077	\$720	\$390,659	2%
On-site security costs	8%	\$9,444	\$2,000	\$386,066	2%
Bank/other service fees like loan/credit card interest	33%	\$1,833	\$418	\$322,670	2%
Air/hotel/accommodation fees for live musical performances	6%	\$9,458	\$2,500	\$310,755	2%
Computers	22%	\$2,273	\$1,100	\$265,481	1%
SOCAN	11%	\$3,295	\$986	\$200,847	1%
Licensing fees	8%	\$4,232	\$500	\$187,678	1%
Project or operating grants, awards or bursaries	<1%	\$73,313	\$73,313	\$164,221	1%
Ticketing costs	8%	\$3,587	\$1,267	\$149,167	1%
Office furniture	15%	\$1,507	\$600	\$125,236	1%
Online retail fees such as for processing or shipping	5%	\$3,583	\$175	\$95,673	1%
Tapes, CDs, DVDs, records and video purchases	34%	\$484	\$200	\$88,090	0%
Credit card and debit card fees	3%	\$3,305	\$1,745	\$52,985	0%
Duty, brokerage, import fees	13%	\$743	\$400	\$50,814	0%
Funding/advance recoupment	1%	\$8,736	\$7,455	\$37,182	0%
Sponsorship or donation	1%	\$3,685	\$3,400	\$24,799	0%
Application fees or submission fees for Sonic bids etc.	5%	\$151	\$100	\$4,152	0%
Artist label CD purchases	2%	\$194	\$191	\$2,565	0%
Performers visa/work permit fees for performances in Canada	1%	\$224	\$216	\$1,662	0%
<b>Total</b>	<b>82%</b>	<b>\$41,099</b>	<b>\$4,704</b>	<b>\$18,227,464</b>	<b>100%</b>

Note: “Frequency” refers to the percentage of service providers who reported expenditure in the area indicated. Percentages in the Frequency column, when summed, may exceed the total shown because multiple responses were accepted. Totals in the “Percent of total” column may not equal 100% due to rounding. Figures of less than 0.5% are shown as <1%.



As Figure 34 below shows, at 82%, most office and other business spending occurred in Saskatchewan, while 18% occurred elsewhere.

**Figure 34 SERVICE PROVIDER OFFICE AND OTHER BUSINESS EXPENDITURES — PERCENT IN SASKATCHEWAN**



## Sources of financing

This section of the report details various sources of financing drawn upon by artists and service providers. The survey asked respondents whether they had received any funding, such as grants from government or other organizations, or financing through loans or credit.

### Grants / government funding

#### Industry overall

Artists and service providers reported receiving a total of \$9,061,117 in funding. Important funders include SaskMusic, the Saskatchewan Arts Board, FACTOR, Saskatchewan Culture Festival Grant Program, Saskatchewan Lotteries *Lotteries Trust Fund*, municipal governments, including Regina and Saskatoon, the Canada Council for the Arts. Funds provided by private sources, such as from friends and family, and corporate sponsorships were also cited.

Based on survey findings, approximately 82% of total funding dollars reported went to service providers, while 18% went to artists.

#### Distribution of funding

Based on reported funding figures, approximately 15% of artists and 23% of service providers received funding from grants or government sources.

## Loans and credit

### Industry overall

As Figure 35 below shows, the Saskatchewan music industry received nearly \$1.8 million in loans and credit in 2007. At just over \$1 million, artists received a slightly larger share of this financing (58%) than did service providers (\$744,000, or 42%).

**Figure 35 INDUSTRY – LOANS / CREDIT**

	Artist total (\$)	Service provider total (\$)	Industry total (\$)
<b>Total</b>	<b>\$1,040,760</b>	<b>\$744,548</b>	<b>\$1,785,308</b>

### Artist loans and credit

Figure 36 provides information on loans and credit received by artists. The first point to note, as the “Frequency” column reveals, is that only 9% of artists report receiving loans or credit in 2007. Nearly nine-tenths of artist loan and credit funding came from a financial institution (87%).

**Figure 36 ARTIST – LOANS / CREDIT**

Source of loans/credit	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Financial institution	5%	\$10,945	\$7,500	\$910,320	87%
Friends, family, other private sources	3%	\$2,711	\$2,000	\$106,196	10%
Business other than financial institution	1%	\$1,650	\$1,650	\$24,244	2%
<b>Total</b>	<b>9%</b>	<b>\$7,595</b>	<b>\$3,214</b>	<b>\$1,040,760</b>	<b>100%</b>

Note: “Frequency” refers to the percentage of artists who reported receiving revenue from the source indicated. Total percentage in the “Percent of total” column may not equal 100% due to rounding

### Service provider loans and credit

Figure 37 provides information on loans and credit received by service providers. As with artists, only 9% of service providers report getting loans or credit in 2007. Also like artists, the largest source of loans and credit for service providers is financial institutions (85%, for a total value of more than \$630,000).

**Figure 37 SERVICE PROVIDER – LOANS / CREDIT**

Source of loans/credit	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Financial institution	6%	\$20,427	\$16,000	\$630,514	85%
Friends, family, other private sources	2%	\$5,614	\$5,000	\$67,782	9%
Business other than financial institution	1%	\$7,066	\$7,431	\$46,251	6%
<b>Total</b>	<b>9%</b>	<b>\$15,045</b>	<b>\$9,000</b>	<b>\$744,548</b>	<b>100%</b>

Note: “Frequency” refers to the percentage of service providers who reported receiving revenue from the source indicated. Total percentage in the “Percent of total” column may not equal 100% due to rounding. Figures of less than 0.5% are shown as <1%.

## Recommendations for ongoing data collection

This study's findings represent a benchmark for Saskatchewan; as time progresses and economic circumstances change, music industry stakeholders will want to see how the Saskatchewan music industry has changed and how up-to-date economic indicators for the industry can be acquired.

In an ideal future, if the costs of data collection and analysis could be ignored, essential information gathering and processing would naturally and effortlessly be undertaken by an organization with ample human resources available to track the ebb and flow of individual artists, groups, organizations, and businesses into and around the industry. This future is, of course, purely hypothetical. Realistically, some steps *can* be undertaken to develop increasingly accurate measures over time, in a cost-effective manner. Our recommendations for such a cost-effective ongoing data collection system are outlined below.

### **Use industry tested definition**

Previous industry studies have defined “the music industry” in widely differing ways. In any primary research study, the questions researchers must resolve are, “who do we include?” and “where do we stop?” The definitions developed and applied by **kisquared** in the 2008 Economic Impact Assessment of the Saskatchewan Music Industry study are clearly laid out in the questionnaire, and capture economic data on the basis of what people in the industry actually *do*, rather than the job titles or labels that might be applied to them. Having already interviewed 446 members of the Saskatchewan music industry, we can vouch for the acceptance, legitimacy, and repeatability of this approach.

The present study is also the most comprehensive economic study yet undertaken. The only expansion of the industry definition that would be of any importance would result from including music CD and DVD retailers. It should be noted that special overtures would be needed to gain enough “buy in” to this research for participation from the major recorded music retailers.

### **Ensure comparability across jurisdictions**

The adage not to compare “apples and oranges” applies with particular force when reviewing past music industry studies. If SaskMusic seeks to compare the 2008 study's findings to those it obtains in future, it is imperative that industry definitions do not change.

We recommend that this statistically accurate and truly representative study be adopted as an industry-measuring model of “best practice.” Other jurisdictions should be encouraged to use the same definitional approach and measures to ensure comparability. We note that, since a music industry study of this scope has never been conducted nationally, doing so would both give the Saskatchewan industry a clearer view of the context in which it operates, and strengthen the economic voice of the industry in Canada overall.

## Count the population

Counting the population of the industry is key to measuring its economic impact. Our original process was to identify as many solo artists, groups and service providers as we could, from as many sources as possible. This, however, could only be a starting point. Based on the unique and irreducible factor of *music-related activity having quantifiable economic impact*, our questionnaire design ensured that the data collection process itself would screen potential respondents either “in” or “out” of the industry.

Replicating this process is crucial for future data collection. The **kisquared** 2008 Economic Impact Assessment of the Saskatchewan Music Industry study’s data collection process entailed asking these essential questions of each and every contact, each and every time an interview was conducted (note that the questions below have been streamlined for the sake of this example):

- Are you an artist? ***[If yes, we confirmed 1 solo artist-member in the industry.]***
- Are you a member of a group? ***[If yes, we confirmed 1 group-member in the industry.]***
- How many other members are in your group? ***[If the respondent said “5 of us” we confirmed 4 more individual group members in the industry.]***

The real-time “snowball” recruiting technique used in interviewing resulted in an expansion of the contact database and, ultimately in the industry population count.

- Do you know of any other artists that are in the industry that we may not know about? ***[If our respondent gave us two new names that we did not have in our database already, we counted 2 potential solo artist-members in the industry, their membership being subject to the screening criteria incorporated into the questionnaire.]***
- Do you know of any other groups in the industry that we may not know about? ***[If the respondent said yes, and cited 2 other groups, of which we found that we already had one in our database, and one that was not listed, we counted 1 more potential group-artist in the industry.]***
- How many members are in that new group that we do not have in our database? ***[If the respondent cited 4 members in the new group, we counted 4 more potential individual members in the industry.]***

Aside from the **kisquared** 2005 Economic Impact Analysis of Manitoba’s Music Industry, conducted on behalf of the Manitoba Audio Recording Industry Association (MARIA) and the 2005 Economic Impact Assessment of the Yukon Music Industry, conducted on behalf of MusicYukon, previous music industry economic impact studies have tended to seriously underestimate the number of participants in the industry overall, both in the roles of artists and service providers.

The example above illustrates how one interview could readily confirm three solo artists, two groups, and a total of 13 individuals as part of the population of the Saskatchewan music industry, most of whom would have been missed by any other method. This process of asking “snowball” questions, and working directly from a continuously updated database, is the only way to ensure that an accurate population count will be maintained in future.

## Appendix A: Comparative review of past music industry studies

### Past Saskatchewan music industry studies

No previous study has assessed the Saskatchewan music industry's economic impact as thoroughly as the present study. For this reason, past assessments of industry size, revenues and expenditures, and economic impact may vary widely from those presented herein. A brief comparison of the present study's results and those of past studies is shown in Figure 38.

**Figure 38 COMPARATIVE DATA FOR THE CANADIAN MUSIC INDUSTRIES**

Description	Economic impact (2007)	Music Industry Review (2007)	SECD (1997) <sup>1</sup>	Balcon Report (1994)
Nominal GDP	\$51.0 billion (2007)	\$51.0 billion (2007)	\$29.2 billion (1997)	\$24.6 billion (1994)
Population	1.0 million (2006)	1.0 million (2006)	1.0 million (1997)	1.0 million (1994)
Size of industry	Artists	1,544	-	1,956
	Service providers	542	-	357
	Total	2,087	-	2,313
Total employment (in-industry + direct and indirect effects)	1,314	-	1,932	1,990 <sup>2</sup>
Total expenditures (including music industry-specific salaries)	\$81.3 million	-	-	-
Direct + indirect impacts (GDP at market prices)*	\$26.2 million	\$64 million <sup>3</sup> (\$38 million)	\$27.0 million	\$131 million <sup>4</sup>
Total industry revenue	\$82.8 million	-	-	\$20.6 million

Note<sup>1</sup>: Estimates derived by Saskatchewan Economic and Cooperative Development (SECD) in 1997 based on 1994 data provided in the Balcon Report.

Note<sup>2</sup>: In-industry employment only, after subtracting broadcasting and retail record store counts.

Note<sup>3</sup>: An estimate based on a comparison with the 2005 Manitoba economic impact figures. The current study's methodology is somewhat different than that for Manitoba in 2005; a revision of the Manitoba figures would produce revised Saskatchewan estimate of \$37.9 million.

Note<sup>4</sup>: It is unclear how this figure was derived given the absence of expenditure data or whether it includes all direct, indirect and induced impacts. The 2007 comparison does not include induced impacts, which are generated by wage re-spending in the economy. However, assuming that expenditures would somewhat approximate the \$20.6 million in reported revenues, an economic impact figure of \$131 million is far beyond what could possibly be derived, as SECD suggests by its presentation of revised figures in 1997.

The 1994 Balcon report is frequently cited in reports that discuss the Saskatchewan music industry, though it did not capture music industry expenditures, a critical component of economic impact assessment. Nevertheless, based on initial Balcon figures, Saskatchewan Economic and Cooperative Development (SECD) estimated the industry's impact at \$27 million with employment generated of 1,932.

The Balcon/SECD figures show a larger music industry (as a percentage of GDP) than the one that exists today. This may be due to wide methodological differences that exist between the two studies. In particular, only the 2008 study measured in-province expenditures. Additionally, it is unclear what effect Saskatchewan's significant economic growth since the early 1990s has had on the music industry. On one hand, economic growth may have assisted the industry's growth by generating greater disposable income and economic opportunities; on the other hand, economic growth may have provided significant incentives for music industry actors to leave the industry.

In 2007, the Saskatchewan Music Industry Review provided an estimated economic impact of \$64 million, based on comparisons with Manitoba. It should be noted that Manitoba figures were based on a slightly different methodology than the present Saskatchewan study; thus, adjusting the Manitoba figures to make the figures comparable would also lead to an adjustment in the Saskatchewan estimate as well to approximately \$38 million. This is still larger than Saskatchewan's measured impact, which suggests that Manitoba's music industry spends a relatively larger amount than does Saskatchewan's.

## Other provincial and territorial music industries

**kisquared** has conducted economic impact studies of the Manitoba (2004) and Yukon (2005) music industries. Additionally, an updated Manitoba study will be released soon. For comparative purposes, data from the three completed studies are presented below (Figure 39).

Differences in population and GDP must be considered when making comparisons between the Saskatchewan, Yukon and Manitoba music industries. At nearly 970,000, Saskatchewan has 84% of Manitoba's population (1.15 million) but 127% of its nominal GDP. Saskatchewan has more than 30 times the Yukon's population and GDP.

In size of music industry, Saskatchewan comes significantly ahead of Manitoba in artists, but behind the Yukon, considering its economy and population are less than 1/30<sup>th</sup> of Saskatchewan's size. At the same time, Manitoba's industry generates more employment than does Saskatchewan's.

Total industry revenues are \$82.8 million in Saskatchewan, compared to \$108 million in Manitoba and \$8.3 million in the Yukon. Total industry expenditures are \$81 million in Saskatchewan, compared to \$115 million in Manitoba and \$8.9 million in the Yukon.

In Saskatchewan, industry expenditures produce an estimated economic impact (direct and indirect effects) of \$26.2 million, which is approximately one-half of that generated in Manitoba (\$51.6 million) and nearly ten times that generated in the Yukon (\$2.8 million).

An analysis of in-province/territory versus out-of-province/territory expenditures shows that Saskatchewan artists and service providers both spend 72% of non-wage expenditures locally. In contrast, Manitoba artists spend more locally while Manitoba service providers spend less locally. In the Yukon, a smaller share of both artists and service providers spend locally.

Saskatchewan service providers received 82% of all reported funding, a share that is similar to the 90% received by Yukon service providers. In Manitoba in 2004, service providers received only 38% of reported funding.

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**Figure 39 COMPARATIVE DATA FOR THE CANADIAN MUSIC INDUSTRIES**

Description	Saskatchewan (2007)	Yukon (2005)	Manitoba (2004)	
Nominal GDP	\$51.0 billion	\$1.5 billion	\$40.2 billion	
2006 Population	1.0 million	30,372	1.1 million	
Size of industry	Artists	1,544	180	512
	Service providers	542	112	570
	Total	2,087	292	1,082
Total employment (in-industry + direct and indirect effects)	1,314	192	2,114	
Music industry-specific salaries and wages	\$18.8 million	\$1.9 million	\$40.1 million	
Expenditures (excluding all salaries and wages)	\$62.6 million	\$7.0 million	\$74.9 million	
Total expenditures (including music industry-specific salaries)	\$81.3 million	\$8.9 million	\$115.0 million	
Direct + indirect impacts (GDP at market prices)*	\$26.2 million	\$2.8 million	\$51.6 million	
Percentage of non-salary artist expenditures spent in territory/province	72%	51%	81%	
Percentage of non-salary service provider expenditures spent in territory/province	72%	67%	52%	
Total industry revenue	\$82.8 million	\$8.3 million	\$107.9 million	
Percentage of funding dollars received by artists	18%	10%	62%	
Percentage of funding dollars received by service providers	82%	90%	38%	

**Note\*: The Manitoba figure has been adjusted to ensure comparability to the Saskatchewan and Yukon studies; as such, it differs from published data.**



## Appendix B: Study parameters

### Scope and definition of industry

It was agreed by study stakeholders that the study would collect industry data for the year 2007 (January 1 to December 31, 2007), on the basis that respondents overall would best be able to conceive of and provide figures for a standard calendar year. Differences between organizations as to their fiscal year start/end dates also made the standard year a more consistent unit of measure.

The development of a working definition for Saskatchewan’s music industry was an essential first step in this study, as it informed and confirmed research parameters. SaskMusic played a crucial role in this step, in close consultation with **kisquared**. For the purpose of measuring and analyzing economic impact, the Saskatchewan music industry was defined as solo artists, groups, and service providers (e.g., individuals, companies, and venues) who have made or spent money related to their musical activities. This definition was incorporated into the data collection instrument (questionnaire) prepared by **kisquared** in consultation with SaskMusic. The process for determining membership in the Saskatchewan music industry is summarized in Figure 40, below.

**Figure 40 HOW RESPONDENTS QUALIFIED FOR SURVEY – CRITERIA**

Artist		Service provider
Solo	Group	
Received personal revenue or government grants in 2007 from:  Writing or performing music, or from royalties for music that s/he personally wrote or performed, either live or recorded; OR  Had expenditures related to personal music career in Saskatchewan in 2007; AND  Is a Saskatchewan resident (lives in Saskatchewan and would file their his or her income tax return in Saskatchewan).	Belongs to a group that received revenue in 2007 from:  Writing or performing music, or from royalties for music anyone in the group had written or performed, either live or recorded; OR  Had expenditures related to the group’s activities in 2007; AND  The group is a registered business in Saskatchewan OR at least half of the group’s members live in Saskatchewan.	Received revenue from, OR incurred expenditures for, a music industry related activity in 2007, such as:  Managing, booking, or promoting the career of an individual artist or group; Buying talent for a live music venue or festival; Operating a recording studio; Arranging music for, producing, mastering, engineering, designing graphics for, manufacturing, or distributing a sound recording; Publishing or licensing music; Manufacturing, selling, servicing, or repairing musical instruments or accessories; Teaching music; Technical services (e.g., doing sound or lighting or production coordination or management for live music performances); Publicist activities or radio tracking; Music therapy; Professional services (e.g., legal or accounting services) to musicians, OR  Had music industry related expenditures in 2007.

- Individuals belonging to **groups** that did not qualify for the survey were given the opportunity to qualify for the survey as solo artists.

For several reasons, the retailers of recorded music were excluded from this study. The main objections to surveying retail music outlets were: first, past experience has shown that the largest music retailers are unwilling/unable to supply the information needed for the study, specifically revenue breakdowns; and second, some smaller retail outlets inevitably would have been missed during data collection due to size, remote location, or lack of advertising, thus significantly misrepresenting the sector. Such gaps would have weakened the study's findings; hence, SaskMusic and **kisquared**'s decision to proceed by excluding retail music outlets.

## Sample development

**kisquared** developed the music industry sample based on existing industry databases, organizational and guild membership lists, contact directories, and secondary research, as well as direct input from SaskMusic and other stakeholders. Important sources used before fielding began include the following:

- SaskMusic membership list
- Conseil culturel francaskois (CCF)
- Organization of Saskatchewan Arts Councils
- Regina Musicians Association
- Saskatchewan Jazz Society

In addition, "snowball" recruitment was used throughout fielding to elicit additional contacts from respondents, in order to increase the sample size and achieve the most accurate population count possible.

The industry sample was segmented into roles of solo artists, groups, and service providers, based on sample source where possible, supplemented by industry informants and SaskMusic project personnel. Sub-categories of service providers were established and all categories were confirmed from respondents during interviews.

## Counting artists and service providers

Interviewing and sample records were used to produce extrapolations by industry role. Data for all those from which information was gathered, including survey completion (confirmed as part of the industry), survey ineligibility (confirmed as *not* part of the industry), and "snowball" additions were used to produce extrapolations of results to all sample contacts. This enabled an industry count to be calculated, with appropriate breakdowns by industry role. The 2007 Saskatchewan music industry, using the definition under *Scope and definition of industry* above, consists of 2,087 solo artists, groups, and service providers. For a breakdown of the industry population by artists and service providers, see *Music industry activity* under the *Saskatchewan music industry profile and economic impact*.

## Questionnaire design

The questionnaire for this study was designed as follows:

- **kisquared** drew upon its previous music industry questionnaire experience by using the questionnaire developed for both MARIA studies (2005 and 2008) and the MusicYukon study as a starting point.
- Prior to the scheduled industry consultation sessions, **kisquared** submitted a draft questionnaire to SaskMusic (in electronic format) for review. SaskMusic's feedback on this draft questionnaire was incorporated into the questionnaire supplied for the industry consultations.
- Two two-hour industry consultation sessions were held with artists and service providers. The first was held at the Saskatchewan Arts Board office in Regina and the second was held at the Administration Centre for Sport, Culture and Recreation in Saskatoon. Prior confirmation was received from 23 artists and service providers in Regina and nine artists and service providers in Saskatoon. A last-minute industry benefit was arranged for the night of the consultation session in Saskatoon, which partially accounts for the lower turnout in Saskatoon when compared to Regina. A total of 20 participants attended the session in Regina and a total of 10 attended in Saskatoon. Music industry representatives reviewed the questionnaire thoroughly and offered feedback concerning the terminology used, the relevance and precision of questions, and the overall effectiveness of the questionnaire. Participation from industry players in these consultation sessions was essential to validate the research instrument by promoting focused and informative responses and maximizing potential respondents' willingness to participate in the study. Results from these consultations were incorporated into a revised questionnaire.
- Post-consultation communication was held via email and telephone between **kisquared** and SaskMusic to further refine the questionnaire based on the feedback received from artists and service providers.
- SaskMusic notified all potential respondents in the music industry sample by informing them of the survey (including interview dates), explaining the purposes of the research and offering recipients an opportunity to telephone a contact at SaskMusic or **kisquared** for more details about participation in the study. The finalized questionnaire was distributed to **kisquared's** fielding staff, who had been appropriately briefed as to study objectives and fielding parameters, and interviews were conducted from **kisquared's** in-house custom-built call center, so that quality control measures such as call monitoring and error checking could be applied throughout fielding. Interviewing began on June 16 and was completed on August 7, 2008.

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## Data collection

**kisquared** collected 446 complete surveys, comprising 160 solo artists (of an estimated population of 1,150), 121 group artists (of an estimated population of 394), and 165 service providers (of an estimated population of 542) from the music industry sample developed for the study, exceeding the initial expectations of 400 completed surveys. All data collected by **kisquared** interviewers was entered in duplicate and compared for discrepancies to ensure 100% keystroke accuracy. The overall margin of error for the study, based on the three population estimates, is  $\pm 4.95\%$  at the 95% confidence level. When broken down by music industry role, the margins of error are  $\pm 4.78\%$  for artists and  $\pm 5.31\%$  for service providers.

## Data cleaning, organization and analysis

The collected data was cleaned and reviewed to verify conformance to data collection parameters used by **kisquared**. The data was then re-organized and appropriately coded in preparation for more comprehensive analysis. Population weighting multipliers were derived to weight data by industry role (to match population counts), and to account for differing sampling rates by industry role. Where the survey permitted open-ended responses, a team of research associates coded the data into relevant categories.

The following statistics were generated for this study:

- Population counts were derived for the industry based on study participation rates and call record data by industry category.
- Weighted frequency statistics were run for all questions where appropriate, with the data reported where relevant.
- Weighted descriptive data was calculated for all questions to generate revenue, expenditure, employment and other data. Where respondents were unable/unwilling to provide dollar amounts, data was imputed using the mean of the appropriate industry role and tier (solo artist, group, or service provider).
- Cross-tabulations for frequency and descriptive data were run where appropriate. This normally consisted of breaking down data by industry role and category.
- Economic measures, including economic impact estimates, were generated using weighted descriptive data, 2004 industry intensity multipliers for Saskatchewan, and other data, where appropriate.

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## Economic impact analysis – method and rationale

The following summarizes the methodology used for the economic impact portion of this study.

Statistics Canada's *2004 Provincial Input-Output Multipliers: Saskatchewan* (2008), purchased by **kisquared**, was critical to performing the analysis. Several other sources were also particularly useful in providing definitions, economic data, and supporting methodological information and should be acknowledged. These include the following sources (some used for comparative and instructive purposes):

- Manitoba Bureau of Statistics, *Manitoba Economic Multipliers 2004*, September 2004;
- NWT Bureau of Statistics, Government of the Northwest Territories, *NWT Input-Output Model: An Overview*, June 2006;
- Saskatchewan Bureau of Statistics, *Economic Review 2007*, June 2008;
- Saskatchewan Bureau of Statistics, *Monthly Statistical Review*, September 2008;
- Statistics Canada, *A Guide to Deflating the Input-Output Accounts: Sources and Methods*, 2001;
- Statistics Canada, *North American Industry Classification System (NAICS) - Canada*, 2007; and
- Statistics Canada, *The Input Structure of the Canadian Economy, 2003-2004*, February 2008.

The survey instrument for the study gathered very detailed expenditure information from respondents, including the proportion of expenditures spent in Saskatchewan, as only Saskatchewan-based expenditures can be used to estimate the economic impact on the Saskatchewan economy. Through industry consultation sessions, **kisquared** found that respondents are best able to provide such expenditure data if prompted to report how much they spent in each category during a full taxation year – in this case for the year 2007. This is consistent with **kisquared**'s past economic impact research experiences.

Data provided by respondents was in the form of their 2007 demand for commodities, while the multipliers that were available are in the form of industry intensity ratios (i.e., multipliers representing the ratio of total economic impact to direct industry output). This posed three main challenges.

The first challenge was that the data collected in commodity-based categories required recoding to match the industry-based categories of the multipliers. To do this, commodity categories were converted to North American Industry Classification System (NAICS) codes, which were then linked to the multiplier categories. Detailed information from Statistics Canada on the composition of each NAICS category allowed such conversions to be performed without undue difficulty.

The second challenge involves the issue of margins and taxes. Industry output is valued at producers' prices, which is equivalent to "factory gate" sales prices, before indirect taxes on the product, or retail, wholesale, and transportation margins are factored in. In contrast, the commodity-based data that was collected is in the form of purchasers' prices that include such taxes and margins. Fortunately, data on the relative value of margins and taxes was provided by Statistics Canada in *The Input-Output Structure of the Canadian Economy, 2003-2004*, which allowed industry expenditures to be reduced to producer price estimates.

A third challenge involved the issue of double-counting. The use of industry intensity ratios requires considerable caution to be exercised by the researcher so that double counting of industry impacts is avoided. The expenditures collected during the survey included expenditures from some music industry members to other music industry members. In such cases, counting the expenditures of both establishments would be to double-count the impact, thereby overstating the combined economic impact for Saskatchewan. To address this issue, all expenditures cited by Saskatchewan music industry establishments that were identified as (1) staying in Saskatchewan, (2) being used to purchase a music industry-related commodity, and (3) for which revenue figures cited by other Saskatchewan music industry establishments could be corroborated, were deleted from the expenditure totals used in the multipliers. A review of the effect of eliminating double counting from the calculations shows that the open (type I) impact (direct plus indirect) would have been estimated at \$43.6 million, rather than at \$26.2 million, had such double counting been included.

Economic impact was estimated using industry intensity ratios at the worksheet level of aggregation in Statistics Canada's *2004 Provincial Input-Output Multipliers: Saskatchewan* (2008). These multipliers were purchased from Statistics Canada by **kisquared**. Applying the multipliers first involved matching each category of the data collected (coded into industry-based NAICS categories as noted above) to one of 286 Saskatchewan industries listed in the multiplier tables, and then summing the impact results of all industries by artist and service provider. This technique is much more labour-intensive than attempting to apply a generic "music industry" or "sound recording industry" multiplier to the data, but is much more appropriate in view of the diversity of industry roles that exist and the comprehensiveness of this particular study. Economic impact is presented in this report in the form of several economic measures. For each of the direct and direct + indirect impacts, available are the following:

- GDP at market prices (including subsidies and indirect taxes on products);
- GDP at basic prices (excluding subsidies and indirect taxes on products);
- Government net revenues (the net of indirect taxes minus subsidies);
- Saskatchewan labour income (the sum of wages and salaries, supplementary labour income, such as employers' social contributions, and mixed income, which is the net income of unincorporated businesses); and
- Employment (in person-years).

It should be noted that this study provides no estimate of the closed (type II or induced) impacts of the Saskatchewan music industry, that is to say the additional economic impact resulting from consumer spending in the economy. While such an impact is undeniably present in Saskatchewan and contributes additional economic benefits over and above what has been estimated, Statistics Canada no longer provides the multipliers to calculate such impact due to their widespread improper misuse.

Given the frequent misuses of economic impact multipliers, their application is best put in a wider context by spelling out some important accompanying assumptions and limitations, as follows:

- Multipliers are simplistic, in that they rely on simple proportionalities – if a one million dollar expenditure is estimated to produce 12 person-years of employment, it is automatically assumed that \$10 million would generate 120 person-years and that \$100 million would generate 1,200 person-years. It is assumed that the economy can flexibly and instantly adjust, without facing issues of scarcity or market rigidity, so as to procure the required inputs to produce the assumed outputs.
- The most recent economic multipliers available (those used for this study) are based on original industry averages from 2004. Changes in the Saskatchewan, Canadian and global economies since then, as well as changes in the music industry, mean that the multipliers provide general estimates only.
- The estimated impacts presented by the multipliers are based on an assumption that all inputs are complements. The model does not consider price-adjusting behaviour or substitution effects. For example, it is assumed that increased demand for one input will lead only to increased demand for other inputs; that increased demand for some inputs is associated with decreased demand for others is not reflected in the model.
- Economic impact multipliers do not address issues of cost-competitiveness or sustainability. The economic impact is presented based on the expenditures being input into the model without consideration of other costs, including opportunity costs.
- The multipliers used in calculating the data discussed in this report are based on 2007 expenditures in Saskatchewan by the music industry. As such, the data discussed in this report represents a snapshot of the music industry in 2007, which may not be representative of the Saskatchewan music industry at other times. Furthermore, while the methodology used in this study can be applied to other studies, attempts to apply specific ratios or multipliers from this report to other industries or economic contexts are not advised.
- The total economic impact discussed in this report applies only to the Saskatchewan music industry as it has been defined for the present study. Therefore, the economic impact of any establishments or industry participants not meeting the eligibility criteria set for this study is not included in the results.

## Recommendation for ongoing data collection

For future economic impact assessment studies, it is recommended that the same definitional approach and measures are used to ensure comparability with the current study.

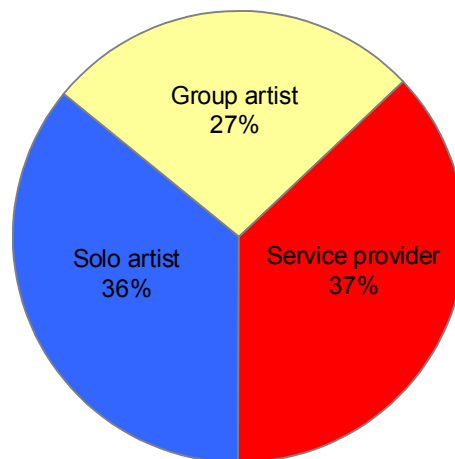
## Appendix C: Respondent profile

The following are quantitative findings regarding the respondents who participated in the 2008 Economic Impact Assessment of the Saskatchewan Music Industry study. The respondent profile presented here is *not* the same as, and should not be confused with, the industry profile presented in previous sections. This is because data collected on individual respondents (such as age, region, and gender) may not necessarily be representative of the wider industry, for which such respondents are spokespersons. Readers should also note that the data presented in this respondent profile section is unweighted.

### Role

Figure 41 below shows the proportion of artist respondents versus service provider respondents in this study. Solo artists form the largest proportion of survey respondents (36%), service providers constitute two-fifths of survey respondents (37%), and group artists represent 27%.

**Figure 41 RESPONDENT INDUSTRY ROLE**





**Region**

Figure 42 below shows the regional breakdown of respondents. Nearly three-quarters of respondents are from either Regina or Saskatoon (74%). This is split fairly evenly between Regina (38%) and Saskatoon (36%).

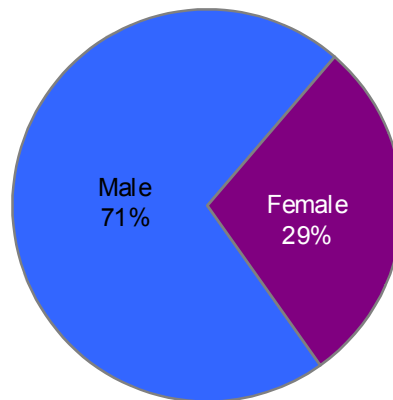
**Figure 42 RESPONDENTS BY REGION**

<b>City</b>	<b>Percent</b>
Regina	38%
Saskatoon	36%
Prince Albert	3%
Moose Jaw	3%
Yorkton	1%
Lloydminster	1%
Swift Current	<1%
North Battleford	1%
Southern Saskatchewan	11%
Northern Saskatchewan	6%
<b>Total</b>	<b>100%</b>

**Gender**

Figure 43 below illustrates the breakdown of respondents by gender. Seven out of ten survey respondents overall are male (71%) compared to three out of ten who are female (29%).

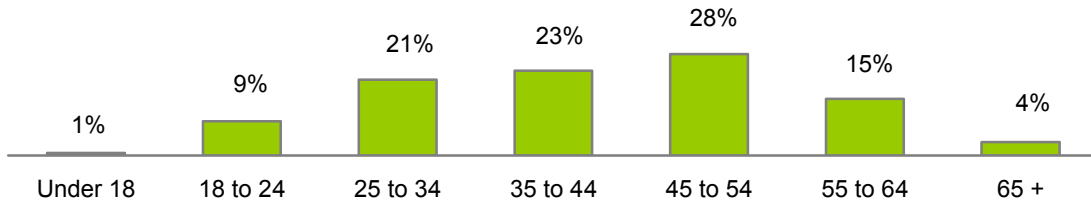
**Figure 43 RESPONDENT GENDER**



**Age**

Over one-half of all respondents are aged 35 to 44 years or 45 to 54 years (23% and 28% respectively.) The average age is 42 years. Figure 44 below shows respondent age distribution.

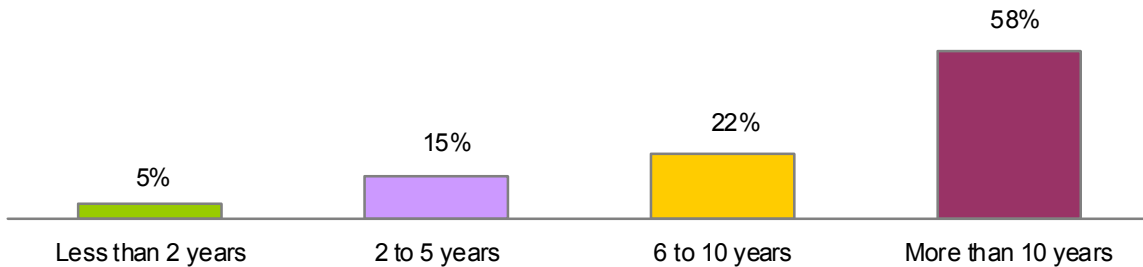
**Figure 44 RESPONDENT AGE**



**Years in music industry**

Figure 45 below shows the proportions of survey respondents based on their number of years in the music industry. Nearly six out of ten respondents (58%) have been in the industry for more than ten years. One-fifth (22%) has been involved for six to ten years, and a similar fraction (20%) have been in the industry for five years or less.

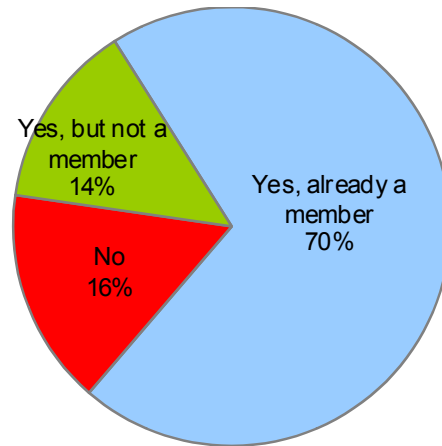
**Figure 45 RESPONDENTS' NUMBER OF YEARS IN THE INDUSTRY**



### Respondent interest in survey findings

This study collected data on whether respondents wanted to be added to SaskMusic’s email list so that they could receive the survey results. Figure 46 below shows the high level of interest in survey findings: 84% would like to receive the survey results by way of SaskMusic’s email list (70% being SaskMusic members already), whereas just one-sixth (16%) do not wish to be so added.

**Figure 46 RESPONDENTS SEEKING EMAIL SUBSCRIPTION TO STUDY RESULTS**



## Appendix D: Questionnaires

### Qualifying (screening) questionnaire

**N = 400**

INTERVIEWER: \_\_\_\_\_ ID# \_\_\_\_\_ SURVEY# \_\_\_\_\_

SECTOR: Artist ..... 1 Group ..... 2 SP / venue ..... 3

ARTIST INDIVIDUAL NAME: \_\_\_\_\_

ARTIST GROUP NAME: \_\_\_\_\_

BUSINESS / VENUE NAME: \_\_\_\_\_

PHONE: ( \_\_\_\_\_ ) \_\_\_\_\_ - \_\_\_\_\_ EXT: \_\_\_\_\_

May I please speak to \_\_\_\_\_ ?

**ANSWERING MACHINE MESSAGE:** Hello, I'm calling on behalf of SaskMusic, the Saskatchewan Recording Industry Association about the music industry survey. Your name was given to us as an active participant in the Saskatchewan music industry. I would really appreciate it if you could return my call toll free at 1-888-950-8002. Also, let me assure you I am conducting research on behalf of SaskMusic. This is not a sales call. All those that agree to participate are eligible to win an iPod Classic as well. I look forward to speaking with you soon. And again, the toll free number is 1-888-950-8002. Thanks!

Hello, my name is \_\_\_\_\_ and I'm calling on behalf of SaskMusic, the Saskatchewan Recording Industry Association. Have you heard about the music industry survey? We would like to discuss Saskatchewan's music industry with people *in* the industry, and are looking to speak to someone who can describe their own, their group's, or their business's revenue and expenses in connection with the music industry. Would that person be you? **IF NO, ASK WHO WOULD BE APPROPRIATE RESPONDENT AND RECORD CONTACT INFORMATION ON SAMPLE.**

**MENTION iPod CLASSIC CONTEST IF NECESSARY.** Everyone who completes the survey is eligible to win an iPod Classic.

**IF YES...** This survey should only take 20 minutes of your time – do you have time right now to complete this survey? **IF NOT, ASK IF THERE IS A BETTER TIME AND ARRANGE TO CALL BACK**

Before we begin I would just like to assure you this information will never be shared with any government agency. All the information gathered through this study is strictly confidential. We guarantee your anonymity. We will be asking questions about your revenue and expenses, but no individual or business names will be attached to the research findings, and the report submitted to SaskMusic will only discuss the results of the survey as a whole. Also, this call may be monitored for quality assurance purposes.

**GROUP QUALIFICATION**

S1 Do you belong to a music *group* or band that received any revenue in 2007 from writing or performing music, or from royalties for music that anyone in the group has written or performed, either live or recorded? **IF YES, ASK:** And that group’s name is?

- Yes (**RECORD GROUP NAME BELOW**)... 1 **GO TO S3**
- No, not in a group ..... 2 **GO TO S7**
- Belong to group, but no revenue  
(**RECORD GROUP NAME BELOW**)..... 3
- Group no longer exists ..... 4 **GO TO S7 ENTER II**
- Don’t know/refused ..... 9 **GO TO S7**

Group name \_\_\_\_\_

S2 What about expenses related to your group’s activities? Did your group have any music industry-related expenses in Saskatchewan in 2007?

- Yes, group had expenses..... 1 **ENTER GROUP NAME ABOVE**
- No, no expenses ..... 2 **GO TO S7**
- Don’t know/refused ..... 9 **GO TO S7**

S3 Is your music group a registered business in Saskatchewan?

- Yes ..... 1 **GO TO S5**
- No..... 2
- Don’t know / refused ..... 9

S4 Do at least half the members of your group live in Saskatchewan?

- Yes ..... 1
- No..... 2 **GO TO S7**
- Don’t know / refused ..... 9 **GO TO S7**



S5 Are you the best person to discuss your group’s revenue and expenses in connection with the music industry, or could you give me the name and contact number of someone else who would be better able to do that?

Yes ..... 1  **Group**  
 No **(FILL OUT INFO BELOW)** ..... 2  
 Don’t know /refused ..... 9

Group rep \_\_\_\_\_  
 Phone: ( \_\_\_\_\_ ) \_\_\_\_\_ - \_\_\_\_\_

S6 And how many members play in your group including yourself?

\_\_ \_\_ **ENTER 99 FOR DK/REF**

**ARTIST QUALIFICATION**

S7 Did *you* receive any personal revenue in 2007, from writing or performing music, or from royalties for music that you have *personally* written or performed, either live or recorded, that is to say, as a solo performer, *not* as a member of any group?

Yes ..... 1 **GO TO S9**  
 No..... 2  
 Artist no longer participating in industry ..... 3 **GO TO S10 ENTER 12**  
 Don’t know / refused ..... 9

S8 What about *expenses* related to your *personal* music career? Did you spend any money on your personal music career in Saskatchewan in 2007?

Yes ..... 1  
 No..... 2 **GO TO S10**  
 Don’t know / refused ..... 9 **GO TO S10**

S9 Do you consider yourself a Saskatchewan resident, that is, you live in Saskatchewan and file or would file your income tax return there?

Yes ..... 1  **Solo artist**  
 No..... 2  
 Don't know / refused ..... 9

**SERVICE PROVIDER QUALIFICATION**

S10 Have you received any revenue in 2007 from any other music industry related activity, such as: Managing, booking, or promoting an individual artist or group? **PAUSE** Buying talent for a live music venue or festival? **PAUSE** Operating a recording studio? **PAUSE** Arranging music for, producing, mastering, engineering, designing graphics for, manufacturing or distributing a sound recording? **PAUSE** Publishing or licensing music? **PAUSE** Manufacturing, selling, servicing, or repairing musical instruments or accessories? **PAUSE** Teaching music? **PAUSE** Technical services such as doing sound or lighting or production coordination or management for live music performances? **PAUSE** Publicist activities or radio tracking? **PAUSE** Music therapy? **PAUSE** Or professional services such as legal, administration, marketing, photography, video production or accounting services to musicians? **IF YES DURING ANY PAUSE, ASK** Did you have any music industry related *expenses* in 2007? **IF NO TO ALL, ASK:** Did you have any music industry related *expenses* in 2007?

- |   |   |   |
|---|---|---|
| Yes, I had revenue, but no expenses .....                             | 1 | } <input checked="" type="checkbox"/> <b>Service provider</b> |
| No revenue, but I had expenses .....                                  | 2 |   |
| I had both revenue and expenses .....                                 | 3 |   |
| No revenue , and no expenses either.....                              | 4 |   |
| Business no longer in existence or no longer servicing industry ..... | 5 | <b>ENTER 13</b>   |
| Don't know/refused .....  | 9 |   |

**IF SERVICE PROVIDER, SAY** You are listed as the contact for [SEE BUSINESS NAME ON SAMPLE]. Is this the business you are referring to? **[IF NO, ASK AND RECORD BUSINESS NAME BELOW, ON FRONT OF SCREENER AND ON SERVICE PROVIDER SURVEY]**

Business name: \_\_\_\_\_

**IF RESPONDENT DOES NOT QUALIFY AS GROUP, ARTIST, OR SERVICE PROVIDER, THEN SAY...**These are the all the questions that I need to ask. We really appreciate your time in helping us complete a music industry impact study for SaskMusic.

**REFER TO CHECK BOXES (  ) TO DETERMINE WHICH SURVEY(S) RESPONDENT QUALIFIES FOR. THEN GO TO APPROPRIATE SURVEY(S)**

**IF RESPONDENT QUALIFIES FOR MORE THAN ONE SURVEY, SAY** You qualify for the [ARTIST / GROUP / SERVICE PROVIDER] and the [ARTIST / GROUP / SERVICE PROVIDER] surveys. We will begin with the \_\_\_\_\_ survey.

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**Solo artist questionnaire**

**SOLO ARTISTS**

INTERVIEWER: \_\_\_\_\_ ID# \_\_\_\_\_ SURVEY # \_\_\_\_\_

ARTIST INDIVIDUAL NAME: \_\_\_\_\_

RESPONDENT NAME: \_\_\_\_\_

PHONE: ( \_\_\_\_\_ ) \_\_\_\_\_ - \_\_\_\_\_ EXT: \_\_\_\_\_

**REVENUE**

As this is an economic impact study, I’m going to ask you questions now about any money *you*, as a solo artist, made making music, and then about money from managing or providing services for other musicians, and then about money from grants or loans.

Q1 Not including any grants, did *you*, as a solo artist, receive any revenue in 2007 from... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And approximately how much gross revenue did you receive from that in 2007?

- Live performance fees?..... 01 \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_
- Selling promotional merchandise?..... 02 \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_
- Selling or distributing CDs, tapes, digital  
or other recordings of your music? ..... 03 \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_
- An advance on a record or  
distribution deal?..... 04 \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_
- Royalties from your record sales?..... 05 \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_
- Payments from performing rights  
organizations such as SOCAN (“so-can”),  
B.M.I. or ASCAP (“ass-kap”)?..... 06 \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_
- Mechanical royalties? ..... 07 \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_
- Commissions or fees for composing  
music or lyrics or other publishing  
revenue? ..... 08 \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_
- Synch (“sink”) fees and licensing fees? ... 09 \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_
- Speaking engagements, workshops or  
other training? ..... 10 \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_
- Fees received for radio and television  
performances, or film and video  
broadcasts? ..... 11 \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_
- Winnings from songwriting or  
talent contests? ..... 12 \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_
- None ..... 77
- Don’t know ..... 88
- Refused ..... 99





Q2 Did you, as a solo artist, receive any revenue in 2007 from... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And what was the gross revenue you received from that in 2007?

**DO NOT  
ASK 1 TO 16  
IF ALSO  
QUALIFIES  
AS  
SERVICE  
PROVIDER**

Managing, booking, or promoting an artist other than yourself?.....	01	\$ ____ , ____ , ____
Producing promotional merchandise for another artist such as t-shirts, posters and stickers?.....	02	\$ ____ , ____ , ____
Commissions for providing talent for a live music venue or festival? .....	03	\$ ____ , ____ , ____
Technical services such as doing sound or lighting, or production coordination or management for live music performances? .....	04	\$ ____ , ____ , ____
Arranging other artists' music?.....	05	\$ ____ , ____ , ____
Renting out rehearsal space?.....	06	\$ ____ , ____ , ____
Operating a sound recording studio and remember, we are only looking for revenues related to the music industry? ..	07	\$ ____ , ____ , ____
Engineering, mastering or producing another artist's sound recording?.....	09	\$ ____ , ____ , ____
Manufacturing another artist's sound recording? .....	10	\$ ____ , ____ , ____
Distributing another artist's sound recording?.....	11	\$ ____ , ____ , ____
Publishing or licensing another artist's music? .....	12	\$ ____ , ____ , ____
Manufacturing, renting, selling, repairing or servicing music instruments or accessories? .....	13	\$ ____ , ____ , ____
Teaching music? .....	14	\$ ____ , ____ , ____
Fees from providing music therapy as an accredited music therapist? .....	15	\$ ____ , ____ , ____
Professional services, like design, grant application assistance, legal, marketing, administration, consulting or accounting services? .....	16	\$ ____ , ____ , ____
Sponsorship or advertising for live performances? .....	17	\$ ____ , ____ , ____
Per diems or salary from your record label or group? .....	18	\$ ____ , ____ , ____
Fees paid for adjudicating at a music festival or contest? ..	31	\$ ____ , ____ , ____
None .....	77	
Don't know .....	88	
Refused .....	99	

Q4 Did you receive any *funding* as a solo artist in 2007 from... **READ LIST AND CIRCLE ALL THAT APPLY, THEN ASK:** And what was the total amount of that funding in 2007?

FACTOR? (“factor”) .....	01	\$	___	,	___	,	___	___
Musicaction? (“mew-zeek-ax-ee-on”) .....	02	\$	___	,	___	,	___	___
The Canada Council for the Arts? .....	06	\$	___	,	___	,	___	___
SOCAN (“so-can”) Foundation? .....	07	\$	___	,	___	,	___	___
VideoFACT? .....	09	\$	___	,	___	,	___	___
PromoFACT? .....	10	\$	___	,	___	,	___	___
A First Nation, Metis, or Inuit government or organization? .....	11	\$	___	,	___	,	___	___
Corporate sponsorships? .....	12	\$	___	,	___	,	___	___
Non-repayable money from friends, family or other private sources? .....	13	\$	___	,	___	,	___	___
SaskMusic? .....	17	\$	___	,	___	,	___	___
Saskatchewan Arts Board? .....	18	\$	___	,	___	,	___	___
CMT Video Advantage Program? .....	19	\$	___	,	___	,	___	___
Radio Starmaker Fund? .....	20	\$	___	,	___	,	___	___
From independent fundraising? .....	21	\$	___	,	___	,	___	___
Saskatchewan Lotteries? .....	22	\$	___	,	___	,	___	___
From the City of Regina? .....	23	\$	___	,	___	,	___	___
From the City of Saskatoon? .....	24	\$	___	,	___	,	___	___
From the Saskatchewan Cultural Exchange Society? ..	25	\$	___	,	___	,	___	___
SaskCulture Festival Grant Program? .....	26	\$	___	,	___	,	___	___
Canadian Heritage Canada Music Fund? .....	27	\$	___	,	___	,	___	___
Any other agency? (specify _____) .....	14	\$	___	,	___	,	___	___
Any other agency? (specify _____) .....	15	\$	___	,	___	,	___	___
Any other agency? (specify _____) .....	16	\$	___	,	___	,	___	___
None .....	77							
Don’t know .....	88							
Refused .....	99							

Q5 Did you as a solo artist receive any music industry related *loans or credit* in 2007 from ... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And how much did you receive from that in 2007?

A financial institution? .....	1	\$	___	,	___	,	___	___
A business other than a financial institution? .....	2	\$	___	,	___	,	___	___
Friends, family or other private sources? .....	3	\$	___	,	___	,	___	___
A scholarship or bursary? .....	4	\$	___	,	___	,	___	___
A FACTOR loan? .....	5	\$	___	,	___	,	___	___
SaskMusic Small Business Loans Program .....	6	\$	___	,	___	,	___	___
No loans or credit from any source .....	7							
Don’t know .....	8							
Refused .....	9							

- Q6 So far you have told me that in 2007 you received \_\_\_\_\_ from the music industry. Is there any revenue that we've missed?
- Yes (\$ \_\_\_\_, \_\_\_\_, \_\_\_\_ from \_\_\_\_\_)..... 1  
 Yes (\$ \_\_\_\_, \_\_\_\_, \_\_\_\_ from \_\_\_\_\_)..... 2  
 No..... 3

**EXPENSES**

Now that we have covered revenue, I'd like to ask you some questions concerning your *expenses* related to the music industry for the year 2007. These are grouped as costs for: equipment and gear, touring, professional services, and office or site-related costs.

- Q7 Could you please tell me whether you, as a solo artist, spent anything in 2007 on *equipment* costs, whether for purchases, rental or leasing, for... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And how much did you spend on that?

Specialized hardware and software, including interfaces, controllers, etc.? .....	01	\$ ____, ____, ____
DJ equipment and accessories, such as CD or MP3 players, turntables, effects, etc.? ..	02	\$ ____, ____, ____
Recording equipment and accessories, including recorders, mixers, etc.? .....	03	\$ ____, ____, ____
Live sound reinforcement and P.A. or lighting equipment and accessories? ....	04	\$ ____, ____, ____
Tents, staging, halls, building or other venue rentals?.....	05	\$ ____, ____, ____
Photographic equipment?.....	06	\$ ____, ____, ____
CD duplication machinery? .....	07	\$ ____, ____, ____
Video software and editing equipment? ...	08	\$ ____, ____, ____
Other musical instruments and accessories?.....	09	\$ ____, ____, ____
Equipment and musical instrument repair and maintenance? .....	10	\$ ____, ____, ____
None .....	77	<b>GO TO Q9</b>
Don't know .....	88	<b>GO TO Q9</b>
Refused .....	99	<b>GO TO Q9</b>

- Q8 Of all these costs, approximately how much was spent in Saskatchewan or with a Saskatchewan supplier? **ENTER 9 SERIES FOR DK/REF.**

\$ \_\_\_\_, \_\_\_\_, \_\_\_\_

Q9 And could you please tell me whether you, as a solo artist, spent anything in 2007 on music industry-related *travel or transportation* costs such as... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And how much did you spend on that?

Passenger or cargo vehicle or trailer purchase, rental, or leasing?.....	01	\$ ____, ____, ____
Vehicle operation, repair and maintenance, including registration, insurance, gas and oil?.....	02	\$ ____, ____, ____
Airfare? .....	03	\$ ____, ____, ____
Bus, taxi, or other ground transportation fares?....	04	\$ ____, ____, ____
Hotel, motel or other accommodations? .....	05	\$ ____, ____, ____
Parking charges and toll fees?.....	06	\$ ____, ____, ____
Conference and showcase fees?.....	07	\$ ____, ____, ____
Out of town food and hospitality? .....	08	\$ ____, ____, ____
Visa or work permit fees? .....	09	\$ ____, ____, ____
Shipping fees associated with travel and touring? 10		\$ ____, ____, ____
None .....	77	<b>GO TO Q11</b>
Don't know .....	88	<b>GO TO Q11</b>
Refused .....	99	<b>GO TO Q11</b>

Q10 And of all these travel and transportation costs, approximately how much was spent in Saskatchewan or with a Saskatchewan supplier? **ENTER 9 SERIES FOR DK/REF.**

\$ \_\_\_\_, \_\_\_\_, \_\_\_\_

Q11 And could you please tell me whether you, as a solo artist, spent anything in 2007 on *outsourced professional services* related to the music industry, such as...  
**READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And how much did you spend on that?

CD / DVD / tape recording or production?	01	\$ ____ , ____ , ____
CD / DVD / tape manufacturing?	02	\$ ____ , ____ , ____
Session players, sidemen, roadies, lighting / sound / merchandise or other crew?	03	\$ ____ , ____ , ____
Set dressing and design?	04	\$ ____ , ____ , ____
All fees for grooming, image consulting, wardrobe purchase and upkeep?	05	\$ ____ , ____ , ____
Fees for advertising, promotion, and publicity?	06	\$ ____ , ____ , ____
Agency fees and management fees?	07	\$ ____ , ____ , ____
Fees for graphics, web design video, or photography?	08	\$ ____ , ____ , ____
Merchandise purchase incl. equipment purchase for resale?	09	\$ ____ , ____ , ____
Merchandise production?	10	\$ ____ , ____ , ____
Vocal or instrumental coaching and other professional development fees?	11	\$ ____ , ____ , ____
Legal and accounting services?	12	\$ ____ , ____ , ____
Sheet music and music books?	13	\$ ____ , ____ , ____
Union or other trade association dues?	14	\$ ____ , ____ , ____
Other outsourced or contract professional services from anyone who is not your full-time employee?	15	\$ ____ , ____ , ____
Non-travel related accommodation and hospitality?	16	\$ ____ , ____ , ____
Translation fees?	17	\$ ____ , ____ , ____
Fees you paid for commissioning a music composition or lyrics?	18	\$ ____ , ____ , ____
None	77	<b>GO TO Q13</b>
Don't know	88	<b>GO TO Q13</b>
Refused	99	<b>GO TO Q13</b>

Q12 Of all these professional service costs, approximately how much was spent in Saskatchewan or with a Saskatchewan supplier? **ENTER 9 SERIES FOR DK/REF.**

\$ \_\_\_\_ , \_\_\_\_ , \_\_\_\_

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Q13 And could you please tell me whether you spent anything in 2007 on *office and other business* expenses related to the music industry, such as... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And how much did you spend on that?

Office furniture?.....	01	\$ _____, _____, _____
Computers? .....	02	\$ _____, _____, _____
Common office expenses like paper, postage, stationery printing, photo-copying, telephone, fax, courier, long distance, Internet, website hosting, etc?.....	03	\$ _____, _____, _____
Rent including utilities? .....	04	\$ _____, _____, _____
Tapes, CDs, DVDs, records and video purchases? .....	05	\$ _____, _____, _____
Application fees or submission fees such as for SonicBids or other EPKs [ <b>IF NECESSARY, SAY</b> electronic press kits], songwriting contests, grants and funding? .....	07	\$ _____, _____, _____
Other marketing costs, including press kits?.....	06	\$ _____, _____, _____
Duty, brokerage and import fees?.....	08	\$ _____, _____, _____
All insurance costs? .....	09	\$ _____, _____, _____
Artist label CD purchases?.....	10	\$ _____, _____, _____
Bank and other financial service fees including loan or credit card interest?.....	11	\$ _____, _____, _____
Funding and advance recoupment?.....	12	\$ _____, _____, _____
Artist fees? .....	13	\$ _____, _____, _____
Licensing fees?.....	14	\$ _____, _____, _____
Online retail fees such as for processing or shipping?.....	15	\$ _____, _____, _____
None .....	77	<b>GO TO Q15</b>
Don't know .....	88	<b>GO TO Q15</b>
Refused .....	99	<b>GO TO Q15</b>

Q14 Of all these office and business costs, approximately how much was spent in Saskatchewan or with a Saskatchewan supplier? **ENTER 9 SERIES FOR DK/REF.**

\$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

Q15 So far you have told me that you have spent \_\_\_\_\_ in 2007 in connection with the music industry. Are there any expenses that we've missed?

- Yes (\$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ for \_\_\_\_\_)..... 1
- Yes (\$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ for \_\_\_\_\_)..... 2
- No..... 3

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Q16 If a registered business, please tell me how many employees, including yourself if you are on payroll, did your business employ in the past year on a full-time equivalent basis, that is based on 30 hours per week? **THEN ASK:** What would you say is the total wages and salaries your business paid for that employee or employees? **THEN ASK:** And what percentage of that workforce would you say is related to music? **ENTER 8 SERIES IF NOT A REGISTERED BUSINESS OR NO EMPLOYEES, ENTER 9 SERIES FOR DK / REF.**

Number of FTE employees	Total wages and salaries	% related to music
_____ . _____	\$ _____, _____, _____	_____ %

Q17 And what, if any, was your GST remittance OR refund for your business in 2007?

Remittance .....	1	\$ _____, _____, _____
Refund.....	2	\$ _____, _____, _____
Zero dollars (\$0) .....	3	
Not applicable .....	8	
Don't know / refused .....	9	

Q19 Since one of the goals of this study is to measure the total size of the Saskatchewan music industry, could you please give us the names and contact numbers of any new or emerging artists, groups, or companies providing services to the music industry that you think should be included in this study that we may not have heard about? **CLARIFY IF THE CONTACT IS A SOLO ARTIST, A GROUP AND/OR SERVICE PROVIDER.**

Name \_\_\_\_\_  
Ph: :(\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_  
**CIRCLE ALL THAT APPLY:** A / G / SP

You can also review our list of artists, groups and service providers online, and then email us with any names you believe are missing. Can I give you the link of that website now? **IF YES, SAY ...** The database can be found at kisquared-dot-com. That's k-i-s-q-u-a-r-e-d dot com. A link in the top right corner will take you directly to the database and to our email link.

Q20 Would you like to be added to SaskMusic's email list to receive the economic impact survey results?

Yes, already member ( <b>CHECK DETAILS ON SAMPLE</b> ).....	1
Yes, not a member ( <b>CHECK DETAILS AND ADD E-MAIL ON SAMPLE</b> ).....	2
No.....	3

Before I let you go, I have just a few questions, which will be used for statistical purposes.

Q21 What are the first three letters of your postal code? **READ BACK USING CHART BELOW**

Letter	Pronounce	Letter	Pronounce	Letter	Pronounce	Letter	Pronounce
A	Alpha	H	Hotel	O	Oscar	V	Victor
B	Bravo	I	India	P	Piper	W	Whiskey
C	Charlie	J	Juliette	Q	Quebec	X	X-ray
D	Delta	K	Kilo	R	Romeo	Y	Yankee
E	Echo	L	Lima	S	Sierra	Z	Zulu
F	Foxtrot	M	Mike	T	Tango		
G	Golf	N	November	U	Uniform		

Q22 **RECORD GENDER OF RESPONDENT – DO NOT ASK**

Male ..... 1  
Female..... 2

Q23 How long have you personally been an active participant in the Saskatchewan music industry?

Less than 2 years ..... 1  
Two to 5 years..... 2  
6 to 10 years ..... 3  
More than 10 years..... 4

Q24 In what year were you born? 1 9 \_ \_

Q25 Do you wish to be entered into the contest for an iPod Classic?

Yes ..... 1  
No..... 2

That concludes this survey, thank you very much for taking the time to participate in this study. My supervisor may phone you just to verify that you did participate.





## Group questionnaire

<b>GROUPS</b>
---------------

INTERVIEWER: \_\_\_\_\_ ID# \_\_\_\_\_ SURVEY # \_\_\_\_\_

GROUP NAME: \_\_\_\_\_

RESPONDENT NAME: \_\_\_\_\_

PHONE: ( \_\_\_\_\_ ) \_\_\_\_\_ - \_\_\_\_\_ EXT: \_\_\_\_\_

### REVENUE

As this is an economic impact study, I'm going to ask you questions about money your group made making music, and then about money from managing or producing for other musicians or groups, and then about money from grants or loans.

Q26 Not including any grants, did *your group* receive any revenue *in 2007* from...  
**READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And approximately how much gross revenue did you receive from that in 2007?

- Live performance fees?..... 01 \$\_\_\_\_,\_\_\_\_,\_\_\_\_
- Selling promotional merchandise?..... 02 \$\_\_\_\_,\_\_\_\_,\_\_\_\_
- Selling or distributing CDs, tapes, digital  
or other recordings of your music? ..... 03 \$\_\_\_\_,\_\_\_\_,\_\_\_\_
- An advance on a record or  
distribution deal?..... 04 \$\_\_\_\_,\_\_\_\_,\_\_\_\_
- Royalties from your record sales?..... 05 \$\_\_\_\_,\_\_\_\_,\_\_\_\_
- Payments from performing rights  
organizations such as SOCAN (“so-can”),  
B.M.I. or ASCAP (“ass-kap”)?..... 06 \$\_\_\_\_,\_\_\_\_,\_\_\_\_
- Mechanical royalties? ..... 07 \$\_\_\_\_,\_\_\_\_,\_\_\_\_
- Commissions or fees for composing  
music or lyrics or other publishing  
revenue? ..... 08 \$\_\_\_\_,\_\_\_\_,\_\_\_\_
- Synch (“sink”) fees and licensing fees? ... 09 \$\_\_\_\_,\_\_\_\_,\_\_\_\_
- Speaking engagements, workshops or  
other training? ..... 10 \$\_\_\_\_,\_\_\_\_,\_\_\_\_
- Fees received for radio and television  
performances, or film and video  
broadcasts? ..... 11 \$\_\_\_\_,\_\_\_\_,\_\_\_\_
- Winnings from songwriting or  
talent contests? ..... 12 \$\_\_\_\_,\_\_\_\_,\_\_\_\_
- None ..... 77
- Don’t know ..... 88
- Refused ..... 99

Q27 Did *your group* receive any revenue in 2007 from... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And what was the gross revenue you received from that in 2007?

**DO NOT  
ASK 1 TO 16  
IF ALSO  
QUALIFIES  
AS  
SERVICE  
PROVIDER**

Managing, booking, or promoting an artist other than yourself?.....	01	\$	___	,	___	,	___	
Producing promotional merchandise such as t-shirts, posters and stickers? .....	02	\$	___	,	___	,	___	
Commissions for providing talent for a live music venue or festival? .....	03	\$	___	,	___	,	___	
Technical services such as doing sound or lighting, or production coordination or management for live music performances? .....	04	\$	___	,	___	,	___	
Arranging other artists' music?.....	05	\$	___	,	___	,	___	
Renting out rehearsal space?.....	06	\$	___	,	___	,	___	
Operating a sound recording studio, and remember, we are only looking for revenues related to the music industry?.....	07	\$	___	,	___	,	___	
Engineering, mastering or producing another artist's sound recording?.....	09	\$	___	,	___	,	___	
Manufacturing another artist's sound recording? .....	10	\$	___	,	___	,	___	
Distributing another artist's sound recording?.....	11	\$	___	,	___	,	___	
Publishing or licensing another artist's music? .....	12	\$	___	,	___	,	___	
Manufacturing, renting, selling, repairing or servicing music instruments or accessories? .....	13	\$	___	,	___	,	___	
Teaching music? .....	14	\$	___	,	___	,	___	
Fees from providing music therapy as an accredited music therapist? .....	15	\$	___	,	___	,	___	
Professional services, like design, grant application assistance, legal, marketing, administration, consulting or accounting services? .....	16	\$	___	,	___	,	___	
Sponsorship or advertising for live performances? .....	17	\$	___	,	___	,	___	
Per diems or salary from your record label or group? .....	18	\$	___	,	___	,	___	
Fees paid for adjudicating at a music festival or contest? ..	31	\$	___	,	___	,	___	
None.....	77							
Don't know .....	88							
Refused .....	99							

Q29 Did your group receive any *funding* in 2007 from... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And what was the total amount of that funding in 2007?

FACTOR? (“factor”) .....	01	\$	___	,	___	,	___	___
Musicaction? (“mew-zeek-ax-ee-on”) .....	02	\$	___	,	___	,	___	___
The Canada Council for the Arts? .....	06	\$	___	,	___	,	___	___
SOCAN (“so-can”) Foundation? .....	07	\$	___	,	___	,	___	___
VideoFACT? .....	09	\$	___	,	___	,	___	___
PromoFACT? .....	10	\$	___	,	___	,	___	___
A First Nation, Metis, or Inuit government or organization? .....	11	\$	___	,	___	,	___	___
Corporate sponsorships? .....	12	\$	___	,	___	,	___	___
Non-repayable money from friends, family or other private sources? .....	13	\$	___	,	___	,	___	___
SaskMusic? .....	17	\$	___	,	___	,	___	___
Saskatchewan Arts Board? .....	18	\$	___	,	___	,	___	___
CMT Video Advantage Program? .....	19	\$	___	,	___	,	___	___
Radio Starmaker Fund? .....	20	\$	___	,	___	,	___	___
From independent fundraising? .....	21	\$	___	,	___	,	___	___
Saskatchewan Lotteries? .....	22	\$	___	,	___	,	___	___
From the City of Regina? .....	23	\$	___	,	___	,	___	___
From the City of Saskatoon? .....	24	\$	___	,	___	,	___	___
From the Saskatchewan Cultural Exchange Society? ..	25	\$	___	,	___	,	___	___
SaskCulture Festival Grant Program? .....	26	\$	___	,	___	,	___	___
Canadian Heritage Canada Music Fund? .....	27	\$	___	,	___	,	___	___
Any other agency? (specify _____) .....	14	\$	___	,	___	,	___	___
Any other agency? (specify _____) .....	15	\$	___	,	___	,	___	___
Any other agency? (specify _____) .....	16	\$	___	,	___	,	___	___
None .....	77							
Don’t know .....	88							
Refused .....	99							

Q30 Did your group receive any music industry related *loans or credit* in 2007 from ... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And how much did you receive from that in 2007?

A financial institution? .....	1	\$	___	,	___	,	___	___
A business other than a financial institution? .....	2	\$	___	,	___	,	___	___
Friends, family or other private sources? .....	3	\$	___	,	___	,	___	___
A scholarship or bursary? .....	4	\$	___	,	___	,	___	___
A FACTOR loan? .....	5	\$	___	,	___	,	___	___
SaskMusic Small Business Loans Program .....	6	\$	___	,	___	,	___	___
No loans or credit from any source .....	7							
Don’t know .....	8							
Refused .....	9							

Q31 So far you have told me that in 2007 your group received \$ \_\_\_\_\_ from the music industry. Is there any revenue that we've missed?

- Yes (\$ \_\_\_\_, \_\_\_\_, \_\_\_\_ from \_\_\_\_\_)..... 1
- Yes (\$ \_\_\_\_, \_\_\_\_, \_\_\_\_ from \_\_\_\_\_)..... 2
- No..... 3

**EXPENSES**

Now that we have covered revenue, I'd like to ask you some questions concerning your group's *expenses* related to the music industry for the year 2007. These are grouped as costs for: equipment and gear, touring, professional services, and office or site-related costs.

Q32 Could you please tell me whether your group spent anything in 2007 on *equipment* costs, whether for purchases, rental or leasing, for... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And how much did you spend on that?

- Specialized hardware and software, including interfaces, controllers, etc.? ..... 01 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- DJ equipment and accessories, such as CD or MP3 players, turntables, effects, etc.? .. 02 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- Recording equipment and accessories, including recorders, mixers, etc.? ..... 03 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- Live sound reinforcement and P.A. or lighting equipment and accessories? .... 04 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- Tents, staging, halls, building or other venue rentals?..... 05 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- Photographic equipment?..... 06 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- CD duplication machinery? ..... 07 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- Video software and editing equipment? ... 08 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- Other musical instruments and accessories?..... 09 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- Equipment and musical instrument repair and maintenance? ..... 10 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- None ..... 77 **GO TO Q34**
- Don't know ..... 88 **GO TO Q34**
- Refused ..... 99 **GO TO Q34**

Q33 Of all these costs, approximately how much was spent in Saskatchewan or with a Saskatchewan supplier? **ENTER 9 SERIES FOR DK/REF.**

\$ \_\_\_\_, \_\_\_\_, \_\_\_\_

Q34 And could you please tell me whether your group spent anything on music industry-related *travel or transportation* costs such as... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And how much did you spend on that?

Passenger or cargo vehicle or trailer purchase, rental, or leasing? .....	01	\$ ____ , ____ , ____
Vehicle operation, repair and maintenance, including registration, insurance, gas and oil? .....	02	\$ ____ , ____ , ____
Airfare? .....	03	\$ ____ , ____ , ____
Bus, taxi, or other ground transportation fares? ....	04	\$ ____ , ____ , ____
Hotel, motel or other accommodations? .....	05	\$ ____ , ____ , ____
Parking charges and toll fees? .....	06	\$ ____ , ____ , ____
Conference and showcase fees? .....	07	\$ ____ , ____ , ____
Out of town food and hospitality? .....	08	\$ ____ , ____ , ____
Visa or work permit fees? .....	09	\$ ____ , ____ , ____
Shipping fees associated with travel and touring? .....	10	\$ ____ , ____ , ____
None .....	77	<b>GO TO Q36</b>
Don't know .....	88	<b>GO TO Q36</b>
Refused .....	99	<b>GO TO Q36</b>

Q35 And of all these travel and transportation costs, approximately how much was spent in Saskatchewan or with a Saskatchewan supplier? **ENTER 9 SERIES FOR DK/REF.**

\$ \_\_\_\_ , \_\_\_\_ , \_\_\_\_

Q36 And could you please tell me whether your group spent anything in 2007 on *outsourced professional services* related to the music industry, such as... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And how much did you spend on that?

CD / DVD / tape recording or production?	01	\$ _____, _____, _____
CD / DVD / tape manufacturing?	02	\$ _____, _____, _____
Session players, sidemen, roadies, lighting / sound / merchandise or other crew?	03	\$ _____, _____, _____
Set dressing and design?	04	\$ _____, _____, _____
All fees for grooming, image consulting, wardrobe purchase and upkeep?	05	\$ _____, _____, _____
Fees for advertising, promotion, and publicity?	06	\$ _____, _____, _____
Agency fees and management fees?	07	\$ _____, _____, _____
Fees for graphics, web design video, or photography?	08	\$ _____, _____, _____
Merchandise purchase incl. equipment purchase for resale?	09	\$ _____, _____, _____
Merchandise production?	10	\$ _____, _____, _____
Vocal or instrumental coaching and other professional development fees?	11	\$ _____, _____, _____
Legal and accounting services?	12	\$ _____, _____, _____
Sheet music and music books?	13	\$ _____, _____, _____
Union or other trade association dues?	14	\$ _____, _____, _____
Other outsourced or contract professional services from anyone who is not your full-time employee?	15	\$ _____, _____, _____
Non-travel related accommodation and hospitality?	16	\$ _____, _____, _____
Translation fees?	17	\$ _____, _____, _____
Fees you paid for commissioning a music composition or lyrics?	18	\$ _____, _____, _____
None	77	<b>GO TO Q38</b>
Don't know	88	<b>GO TO Q38</b>
Refused	99	<b>GO TO Q38</b>

Q37 Of all these professional service costs, approximately how much was spent in Saskatchewan or with a Saskatchewan supplier? **ENTER 9 SERIES FOR DK/REF.**

\$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

Q38 And could you please tell me whether your group spent anything on *office and other business* expenses related to the music industry, such as... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And how much did you spend on that?

Office furniture?.....	01	\$ _____, _____, _____
Computers? .....	02	\$ _____, _____, _____
Common office expenses like paper, postage, stationery printing, photo-copying, telephone, fax, courier, long distance, Internet, website hosting, etc?.....	03	\$ _____, _____, _____
Rent including utilities? .....	04	\$ _____, _____, _____
Tapes, CDs, DVDs, records and video purchases? .....	05	\$ _____, _____, _____
Application fees or submission fees such as for SonicBids or other EPKs [ <b>IF NECESSARY, SAY</b> electronic press kits], songwriting contests, grants and funding? .....	07	\$ _____, _____, _____
Other marketing costs, including press kits?.....	06	\$ _____, _____, _____
Duty, brokerage and import fees?.....	08	\$ _____, _____, _____
All insurance costs? .....	09	\$ _____, _____, _____
Artist label CD purchases?.....	10	\$ _____, _____, _____
Bank and other financial service fees including loan or credit card interest?.....	11	\$ _____, _____, _____
Funding and advance recoupment?.....	12	\$ _____, _____, _____
Artist fees? .....	13	\$ _____, _____, _____
Licensing fees?.....	14	\$ _____, _____, _____
Online retail fees such as for processing or shipping?.....	15	\$ _____, _____, _____
None .....	77	<b>GO TO Q40</b>
Don't know .....	88	<b>GO TO Q40</b>
Refused .....	99	<b>GO TO Q40</b>

Q39 Of all these office and business costs, approximately how much was spent in Saskatchewan or with a Saskatchewan supplier? **ENTER 9 SERIES FOR DK/REF.**

\$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

Q40 So far you have told me that your group has spent \_\_\_\_\_ in 2007 in connection with the music industry. Are there any expenses that we've missed?

- Yes (\$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ for \_\_\_\_\_)..... 1
- Yes (\$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ for \_\_\_\_\_)..... 2
- No..... 3

kisquared





Q41 If a registered business, please tell me how many employees, including yourself if you are on payroll, did your business employ in the past year on a full-time equivalent basis, that is based on 30 hours per week? **THEN ASK:** What would you say is the total wages and salaries your business paid for that employee or employees? **THEN ASK:** And what percentage of that workforce would you say is related to music? **ENTER 8 SERIES IF NOT A REGISTERED BUSINESS OR NO EMPLOYEES, ENTER 9 SERIES FOR DK / REF.**

Number of FTE employees	Total wages and salaries	% related to music
_____ . _____	\$ _____, _____, _____	_____ %

Q42 And what, if any, was your GST remittance OR refund for your business in 2007?

Remittance .....	1	\$ _____, _____, _____
Refund .....	2	\$ _____, _____, _____
Zero dollars (\$0) .....	3	
Not applicable .....	8	
Don't know / refused .....	9	

Q43 And, so that our count is complete and correct, could you also please give me the names and contact numbers of the other members of your group? You said earlier that there were \_\_\_ other members in your group.

Name \_\_\_\_\_  
Ph: :(\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Name \_\_\_\_\_  
Ph: :(\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Name \_\_\_\_\_  
Ph: :(\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Q44 Since one of the goals of this study is to measure the total size of the Saskatchewan music industry, could you please give us the names and contact numbers of any new or emerging artists, groups, or companies providing services to the music industry that you think should be included in this study that we may not have heard about? **CLARIFY IF THE CONTACT IS A SOLO ARTIST, A GROUP AND/OR SERVICE PROVIDER.**

Name \_\_\_\_\_  
Ph: :(\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

**CIRCLE ALL THAT APPLY: A / G / SP**



You can also review our list of artists, groups and service providers online, and then email us with any names you believe are missing. Can I give you the link of that website now? **IF YES, SAY ...** The database can be found at kisquared-dot-com. That's k-i-s-q-u-a-r-e-d dot com. A link in the top right corner will take you directly to the database and to our email link.

Q45 Would you like to be added to SaskMusic's email list to receive the survey results?

- Yes, already member (**CHECK DETAILS ON SAMPLE**)..... 1
- Yes, not a member (**CHECK DETAILS AND ADD E-MAIL ON SAMPLE**)..... 2
- No..... 3

Before I let you go, I have just a few questions, which will be used for statistical purposes.

Q46 What are the first three letters of your postal code? **READ BACK USING CHART BELOW**

Letter	Pronounce	Letter	Pronounce	Letter	Pronounce	Letter	Pronounce
A	Alpha	H	Hotel	O	Oscar	V	Victor
B	Bravo	I	India	P	Piper	W	Whiskey
C	Charlie	J	Juliette	Q	Quebec	X	X-ray
D	Delta	K	Kilo	R	Romeo	Y	Yankee
E	Echo	L	Lima	S	Sierra	Z	Zulu
F	Foxtrot	M	Mike	T	Tango		
G	Golf	N	November	U	Uniform		

Q47 **RECORD GENDER OF RESPONDENT – DO NOT ASK**

- Male ..... 1
- Female..... 2

Q48 How long have you personally been an active participant in the Saskatchewan music industry?

- Less than 2 years..... 1
- Two to 5 years..... 2
- 6 to 10 years ..... 3
- More than 10 years..... 4



Q49 In what year were you born? 1 9 \_ \_

Q50 Do you wish to be entered into the contest for an iPod Classic?

Yes ..... 1  
No..... 2

That concludes this survey, thank you very much for taking the time to participate in this study. My supervisor may phone you just to verify that you did participate.



## Service provider questionnaire

<b>SERVICE PROVIDERS</b>
--------------------------

INTERVIEWER: \_\_\_\_\_ ID# \_\_\_\_\_ SURVEY # \_\_\_\_\_

SERVICE PROVIDER NAME: \_\_\_\_\_

RESPONDENT NAME: \_\_\_\_\_

PHONE: ( \_\_\_\_\_ ) \_\_\_\_\_ - \_\_\_\_\_ EXT: \_\_\_\_\_

### REVENUE

As this is an economic impact study, I'm going to ask you questions now about any money you or your business made in providing services to musicians in the industry, and then about money from grants or loans in 2007.

Q52 Did your business receive any revenue in 2007 from... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And what was the gross revenue you received from that in 2007?

Managing, booking, or promoting an artist?.....	01	\$	___	,	___	,	___	,	___	
Producing promotional merchandise such as t-shirts, posters and stickers? .....	02	\$	___	,	___	,	___	,	___	
Commissions for providing talent for a live music venue or festival? .....	03	\$	___	,	___	,	___	,	___	
Technical services such as doing sound or lighting, or production coordination or management for live music performances? .....	04	\$	___	,	___	,	___	,	___	
Arranging music?.....	05	\$	___	,	___	,	___	,	___	
Renting out rehearsal space?.....	06	\$	___	,	___	,	___	,	___	
Operating a sound recording studio and remember, we are only looking for revenues related to the music industry?.....	07	\$	___	,	___	,	___	,	___	
Rental income from your venue facility?.....	08	\$	___	,	___	,	___	,	___	
Engineering, mastering, or producing a sound recording? .....	09	\$	___	,	___	,	___	,	___	
Manufacturing a sound recording? .....	10	\$	___	,	___	,	___	,	___	
Distributing a sound recording?.....	11	\$	___	,	___	,	___	,	___	
Publishing or licensing music? .....	12	\$	___	,	___	,	___	,	___	
Manufacturing, renting, selling, repairing or servicing music instruments or accessories? .....	13	\$	___	,	___	,	___	,	___	
Teaching music? .....	14	\$	___	,	___	,	___	,	___	
Fees from providing music therapy as an accredited music therapist? .....	15	\$	___	,	___	,	___	,	___	
Professional services, like design, grant application assistance, legal, marketing, administration, consulting or accounting services? .....	16	\$	___	,	___	,	___	,	___	
Sponsorship or advertising for live performances? .....	17	\$	___	,	___	,	___	,	___	
Per diems or salary from a record label? .....	18	\$	___	,	___	,	___	,	___	
Registration, processing or membership fees?.....	30	\$	___	,	___	,	___	,	___	
Fees paid for adjudicating at a music festival or contest? .....	31	\$	___	,	___	,	___	,	___	
None .....	77									
Don't know .....	88									
Refused .....	99									

Q53 Did your business receive any music industry related revenue in 2007 from...  
**READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And what was the gross revenue you received from that in 2007?

- Ticket sales for live music?..... 01 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- Parking, food, refreshment and other  
 income from live music performances? .... 02 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- Agency fees?..... 04 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- Building improvement fees? ..... 05 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- None ..... 77
- Don't know ..... 88
- Refused ..... 99



Q54 And did your business receive any music industry related *funding* in 2007 from...  
**READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And what was the total amount of that funding in 2007?

FACTOR? (“factor”) .....	01	\$	___	,	___	,	___	___
Musicaction? (“mew-zee-k-ax-ee-on”) .....	02	\$	___	,	___	,	___	___
The Canada Council for the Arts? .....	06	\$	___	,	___	,	___	___
SOCAN (“so-can”) Foundation? .....	07	\$	___	,	___	,	___	___
VideoFACT? .....	09	\$	___	,	___	,	___	___
PromoFACT? .....	10	\$	___	,	___	,	___	___
A First Nation, Metis, or Inuit government or organization? .....	11	\$	___	,	___	,	___	___
Corporate sponsorships? .....	12	\$	___	,	___	,	___	___
Non-repayable money from friends, family or other private sources? .....	13	\$	___	,	___	,	___	___
SaskMusic? .....	17	\$	___	,	___	,	___	___
Saskatchewan Arts Board? .....	18	\$	___	,	___	,	___	___
CMT Video Advantage Program? .....	19	\$	___	,	___	,	___	___
Radio Starmaker Fund? .....	20	\$	___	,	___	,	___	___
From independent fundraising? .....	21	\$	___	,	___	,	___	___
Saskatchewan Lotteries? .....	22	\$	___	,	___	,	___	___
From the City of Regina? .....	23	\$	___	,	___	,	___	___
From the City of Saskatoon? .....	24	\$	___	,	___	,	___	___
From the Saskatchewan Cultural Exchange Society or SCES? .....	25	\$	___	,	___	,	___	___
SaskCulture Festival Grant Program? .....	26	\$	___	,	___	,	___	___
Canadian Heritage Canada Music Fund? .....	27	\$	___	,	___	,	___	___
Any other agency? (specify _____) .	14	\$	___	,	___	,	___	___
Any other agency? (specify _____) .	15	\$	___	,	___	,	___	___
Any other agency? (specify _____) .	16	\$	___	,	___	,	___	___
None .....	77							
Don’t know .....	88							
Refused .....	99							

Q55 Did your business receive any music industry related *loans or credit* in 2007 from ... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And how much did you receive from that in 2007?

- A financial institution?..... 1 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- A business other than a financial institution?..... 2 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- Money from friends, family or other private sources?..... 3 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- A scholarship or bursary? ..... 4 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- A FACTOR loan? ..... 5 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- SaskMusic Small Business Loans Program 6 \$ \_\_\_\_, \_\_\_\_, \_\_\_\_
- No loans or credit from any source..... 7
- Don't know ..... 8
- Refused ..... 9

Q56 So far you have told me that in 2007 you received \_\_\_\_\_ from the music industry. Is there any revenue that we've missed?

- Yes (\$ \_\_\_\_, \_\_\_\_, \_\_\_\_ from \_\_\_\_\_)..... 1
- Yes (\$ \_\_\_\_, \_\_\_\_, \_\_\_\_ from \_\_\_\_\_)..... 2
- No..... 3

**EXPENSES**

Now that we have covered revenue, I'd like to ask you some questions concerning your business's *expenses* related to the music industry for the year 2007. These are grouped as costs for: equipment and gear, touring, professional services, and office or site-related costs.





Q57 Could you please tell me whether your business spent anything on music industry related *equipment* costs, whether for purchases, rental or leasing, for... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And how much did you spend on that?

Specialized hardware and software, including interfaces, controllers, etc.? .....	01	\$ _____, _____, _____
DJ equipment and accessories, such as CD or MP3 players, turntables, effects, etc.? ..	02	\$ _____, _____, _____
Recording equipment and accessories, including recorders, mixers, etc.? .....	03	\$ _____, _____, _____
Live sound reinforcement and P.A. or lighting equipment and accessories? ....	04	\$ _____, _____, _____
Tents, staging, halls, building or other venue rentals?.....	05	\$ _____, _____, _____
Photographic equipment?.....	06	\$ _____, _____, _____
CD duplication machinery? .....	07	\$ _____, _____, _____
Video software and editing equipment? ...	08	\$ _____, _____, _____
Other musical instruments and accessories?.....	09	\$ _____, _____, _____
Equipment and musical instrument repair and maintenance? .....	10	\$ _____, _____, _____
None .....	77	<b>GO TO Q59</b>
Don't know .....	88	<b>GO TO Q59</b>
Refused .....	99	<b>GO TO Q59</b>

Q58 Of all these costs, approximately how much was spent in Saskatchewan or with a Saskatchewan supplier? **ENTER 9 SERIES FOR DK/REF.**

\$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

Q59 And could you please tell me whether your business spent anything on music industry-related *travel or transportation* costs such as... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And how much did you spend on that?

Passenger or cargo vehicle or trailer purchase, rental, or leasing? .....	01	\$ ____, ____, ____
Vehicle operation, repair and maintenance, including registration, insurance, gas and oil? .....	02	\$ ____, ____, ____
Airfare? .....	03	\$ ____, ____, ____
Bus, taxi, or other ground transportation fares? ....	04	\$ ____, ____, ____
Hotel, motel or other accommodations? .....	05	\$ ____, ____, ____
Parking charges and toll fees? .....	06	\$ ____, ____, ____
Conference and showcase fees? .....	07	\$ ____, ____, ____
Out of town food and hospitality? .....	08	\$ ____, ____, ____
Visa or work permit fees paid to foreign countries? .....	09	\$ ____, ____, ____
Shipping fees associated with travel and touring? .....	10	\$ ____, ____, ____
None .....	77	<b>GO TO Q61</b>
Don't know .....	88	<b>GO TO Q61</b>
Refused .....	99	<b>GO TO Q61</b>

Q60 And of all these travel and transportation costs, approximately how much was spent in Saskatchewan or with a Saskatchewan supplier? **ENTER 9 SERIES FOR DK/REF.**

\$ \_\_\_\_, \_\_\_\_, \_\_\_\_



Q61 And could you please tell me whether your business spent anything in 2007 on *outsourced professional services* related to the music industry, such as... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And how much did you spend on that?

CD / DVD / tape recording or production?01	\$ ____ , ____ , ____
CD / DVD / tape manufacturing? ..... 02	\$ ____ , ____ , ____
Session players, sidemen, roadies, lighting / sound / merchandise or other crew?..... 03	\$ ____ , ____ , ____
Set dressing and design? ..... 04	\$ ____ , ____ , ____
All fees for grooming, image consulting, wardrobe purchase and upkeep? ..... 05	\$ ____ , ____ , ____
Fees for advertising, promotion, and publicity?..... 06	\$ ____ , ____ , ____
Agency fees and management fees? ..... 07	\$ ____ , ____ , ____
Fees for graphics, web design video, or photography? ..... 08	\$ ____ , ____ , ____
Merchandise purchase incl. equipment purchase for resale?..... 09	\$ ____ , ____ , ____
Merchandise production?..... 10	\$ ____ , ____ , ____
Vocal or instrumental coaching and other professional development fees?..... 11	\$ ____ , ____ , ____
Legal and accounting services? ..... 12	\$ ____ , ____ , ____
Sheet music and music books? ..... 13	\$ ____ , ____ , ____
Union or other trade association dues? ..... 14	\$ ____ , ____ , ____
Other outsourced or contract professional services from anyone who is not your full-time employee? ..... 15	\$ ____ , ____ , ____
Non-travel related accommodation and hospitality?..... 16	\$ ____ , ____ , ____
Translation fees? ..... 17	\$ ____ , ____ , ____
Fees you paid for commissioning a music composition or lyrics?..... 18	\$ ____ , ____ , ____
None..... 77	<b>GO TO Q63</b>
Don't know ..... 88	<b>GO TO Q63</b>
Refused ..... 99	<b>GO TO Q63</b>

Q62 Of all these professional service costs, approximately how much was spent in Saskatchewan or with a Saskatchewan supplier? **ENTER 9 SERIES FOR DK/REF.**

\$ \_\_\_\_ , \_\_\_\_ , \_\_\_\_

kisquared



Q63 And could you please tell me whether your business spent anything on *office and other business* expenses related to the music industry, such as... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And how much did you spend on that?

Office furniture?.....	01	\$ ____ , ____ , ____
Computers? .....	02	\$ ____ , ____ , ____
Common office expenses like paper, postage, stationery printing, photo-copying, telephone, fax, courier, long distance, Internet, website hosting, etc? .....	03	\$ ____ , ____ , ____
Rent including utilities? .....	04	\$ ____ , ____ , ____
Tapes, CDs, DVDs, records and video purchases?.....	05	\$ ____ , ____ , ____
Application fees or submission fees such as for SonicBids or other EPKs [ <b>IF NECESSARY, SAY</b> electronic press kits], songwriting contests, grants and funding?.....	07	\$ ____ , ____ , ____
Other marketing costs, including press kits?.....	06	\$ ____ , ____ , ____
Duty, brokerage and import fees? .....	08	\$ ____ , ____ , ____
All insurance costs? .....	09	\$ ____ , ____ , ____
Artist label CD purchases?.....	10	\$ ____ , ____ , ____
Bank and other financial service fees including loan or credit card interest?.....	11	\$ ____ , ____ , ____
Funding and advance recoupment?.....	12	\$ ____ , ____ , ____
Artist fees? .....	13	\$ ____ , ____ , ____
Licensing fees?.....	14	\$ ____ , ____ , ____
Online retail fees such as for processing or shipping?.....	15	\$ ____ , ____ , ____
Talent, technical and producer fees?.....	16	\$ ____ , ____ , ____
Air, hotel and accommodation fees for live musical performances?.....	17	\$ ____ , ____ , ____
Marketing, advertising and promotion specifically related to live musical performances?.....	18	\$ ____ , ____ , ____
Backline, sound, lights and other production expenses <i>excluding</i> labour costs?.....	19	\$ ____ , ____ , ____
Any other production or stage management expenses <i>excluding</i> labour costs? .....	20	\$ ____ , ____ , ____
On-site security costs? .....	21	\$ ____ , ____ , ____
SOCAN? .....	22	\$ ____ , ____ , ____
Ticketing costs?.....	24	\$ ____ , ____ , ____
Credit card and debit card fees?.....	25	\$ ____ , ____ , ____
Performers' visa or work permit fees for live musical performances in Canada?.....	26	\$ ____ , ____ , ____
None .....	77	<b>GO TO Q65</b>
Don't know .....	88	<b>GO TO Q65</b>
Refused.....	99	<b>GO TO Q65</b>

**ASK VENUES, TALENT BUYERS AND PROMOTERS ONLY**



Q64 Of all these office and business costs, approximately how much was spent in Saskatchewan or with a Saskatchewan supplier? **ENTER 9 SERIES FOR DK/REF.**

\$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

Q65 So far you have told me that you have spent \_\_\_\_\_ in 2007 in connection with the music industry. Are there any expenses that we've missed?

- Yes (\$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ for \_\_\_\_\_)..... 1
- Yes (\$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_ for \_\_\_\_\_)..... 2
- No ..... 3

Q66 If a registered business, please tell me how many employees, including yourself if you are on payroll, did your business employ on a full-time equivalent basis in the past year? **THEN ASK:** What would you say is the total wages and salaries your business paid for that employee or employees? **THEN ASK:** And what percentage of that workforce would you say is related to music? **ENTER 8 SERIES IF NOT A REGISTERED BUSINESS OR NO EMPLOYEES, ENTER 9 SERIES FOR DK / REF. FTE IS CALCULATED BASED ON 30 HOURS PER WEEK.**

Number of FTE employees	Total wages and salaries	% related to music
_____ . ____	\$ _____, _____, _____	_____ %

Q67 And what, if any, was your GST remittance OR refund for your business in 2007?

- Remittance ..... 1 \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_
- Refund ..... 2 \$ \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_
- Zero dollars (\$0) ..... 3
- Not applicable ..... 8
- Don't know / refused ..... 9

Q69 Since one of the goals of this study is to measure the total size of the Saskatchewan music industry, could you please give us the names and contact numbers of any new or emerging artists, groups, or companies providing services to the music industry that you think should be included in this study that we may not have heard about? **CLARIFY IF THE CONTACT IS A SOLO ARTIST, A GROUP AND/OR SERVICE PROVIDER.**

Name \_\_\_\_\_  
Ph: : (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_  
**CIRCLE ALL THAT APPLY: A / G / SP**

You can also review our list of artists, groups and service providers online, and then email us with any names you believe are missing. Can I give you the link of that website now? **IF YES, SAY ...** The database can be found at kisquared-dot-com. That's k-i-s-q-u-a-r-e-d dot com. A link in the top right corner will take you directly to the database and to our email link.

kisquared



Q70 Would you like to be added to SaskMusic’s email list to receive the economic impact survey results?

- Yes, already member (CHECK DETAILS ON SAMPLE)..... 1
- Yes, not a member (CHECK DETAILS AND ADD E-MAIL ON SAMPLE) ..... 2
- No..... 3

Before I let you go, I have just a few questions, which will be used for statistical purposes.

Q71 What are the first three letters of your postal code? **READ BACK USING CHART BELOW**

Letter	Pronounce	Letter	Pronounce	Letter	Pronounce	Letter	Pronounce
A	Alpha	H	Hotel	O	Oscar	V	Victor
B	Bravo	I	India	P	Piper	W	Whiskey
C	Charlie	J	Juliette	Q	Quebec	X	X-ray
D	Delta	K	Kilo	R	Romeo	Y	Yankee
E	Echo	L	Lima	S	Sierra	Z	Zulu
F	Foxtrot	M	Mike	T	Tango		
G	Golf	N	November	U	Uniform		

Q72 **RECORD GENDER OF RESPONDENT – DO NOT ASK**

- Male ..... 1
- Female..... 2

Q73 How long have you personally been an active participant in the Saskatchewan music industry?

- Less than 2 years..... 1
- Two to 5 years..... 2
- 6 to 10 years ..... 3
- More than 10 years..... 4

Q74 In what year were you born?   1     9   \_ \_ \_

Q75 Do you wish to be entered into the contest for an iPod Classic?

- Yes ..... 1
- No..... 2

That concludes this survey, thank you very much for taking the time to participate in this study. My supervisor may phone you just to verify that you did participate.

