

**MusicYukon
Economic Impact Assessment
of the Yukon Music Industry
October 2006**

kisquared



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Introduction

In April 2006, MusicYukon, with funding from Yukon Economic Development and Yukon Film and Sound Commission, engaged **kisquared** to conduct an economic impact assessment of the Yukon music industry, which had never before been undertaken. The current Economic Impact Assessment of the Yukon Music Industry was intended to:

- Provide information about and assessment of the economic impact of the music industry on the Yukon economy, including direct and indirect impact on GDP, labour and employment figures.
- Inform future decision-making on industry development, based on a realistic assessment of the music industry's size, composition and impact of the Yukon economy.

kisquared, in partnership with Paul Kishchuk of **Vector Research**, 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 a project steering committee (consisting of representatives of MusicYukon, Yukon Economic Development, the Yukon Film and Sound Commission, and service providers), designed a comprehensive questionnaire to be 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 the year 2005 (January 1 to December 31, 2005), in the belief that that respondents overall would best be able to conceive of and provide figures for a standard calendar year.

kisquared completed a total of 184 telephone interviews, comprised of 81 solo artists (of an estimated population of 123), 34 group artists (of an estimated population of 57), and 69 service providers (of an estimated population of 112). The overall margin of error for the study, based on population estimates, is $\pm 2.67\%$ at the 95% confidence level ($\pm 3.30\%$ for artists and $\pm 4.53\%$ for service providers).

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 292, the derivation of which is discussed in Appendix B. This report is structured as follows:

- **Introduction** – overview of project objectives, methodology and terminology.
- **Executive summary** – overview of principal study findings.
- **Yukon 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.

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- **Recommendation for revolving data collection** – recommendations for future data collection and data management.
- **Appendices** – Appendix A: comparative summary of Manitoba 2004 and Yukon 2005 music industries, Appendix B: study parameters (background and objectives, methodology, reporting); Appendix C: respondent profile; and Appendix D: questionnaire.

Executive summary

In April 2006, MusicYukon, with funding from Yukon Economic Development and Yukon Film and Sound Commission, engaged **kisquared** to conduct an economic impact assessment of the Yukon music industry. Results are based on 184 interviews with members of the Yukon's music industry. Except where noted, figures are weighted to the music industry population size of 292.

Size of the Yukon music industry

- The estimated population of the Yukon music industry is 292 (counting both artists and service providers).

Figure 1 YUKON MUSIC INDUSTRY – COUNTS BY CATEGORY

Category	Sub-category	Count
Artists (180)	Solo artist/DJ	123
	Groups	57
	Gear/instruments	9
Service providers (112)	Communications, design, promotions and radio tracking firms	17
	Music instructors	40
	Music organizations	3
	Production companies, publishers, record companies and distributors	4
	Recording studios	11
	Venues	28
Total		292

Note: The figures in this table should *not* be interpreted as full-time equivalent (FTE) employment counts.

- A brief profile of respondents has been created. In terms of industry role, 44% were solo artists, 18% were members of groups, and 38% represented service providers. Fifty-percent have been in the music industry for more than ten years, while ten percent have been in the industry for less than two years. Ninety-one percent are based in Whitehorse.
- The gender ratio was 60% male to 40% female. While females represent 30% of artists interviewed, they were 57% of service providers. The average respondent age is 44 years. Five percent identified themselves as having aboriginal ancestry.

Economic impact

Overall

- Yukon music industry revenues in 2005 totaled \$8.29 million. Service providers together earned \$5.5 million, while artists earned the remaining \$2.79 million. Expenditures total \$8.9 million (including \$1.9 million in salaries and wages).
- Of all expenditures, \$6.12 million or 69% was spent in the Yukon, directly benefiting Yukon suppliers. Service providers typically spend a higher proportion of their expenditures in the Yukon (95% of all expenditures; 67% of non-salary expenditures) than do artists (78% of all expenditures; 51% of non-salary expenditures).

Impact on Yukon GDP

- The sum of both *direct* and *indirect* ("spin-off") effects constituted \$2.79 million or 0.18% of the territory's \$1.522 billion GDP (in current dollars) in 2005.

Impact on labour income and employment

- The Yukon music industry spent \$1.90 million in wages and salaries in 2005. Service providers accounted for \$1.12 million (59%), while artists accounted for \$775,000 (41%).
- Apart from artists, venues are the largest generators of wages and salaries in the Yukon music industry, at \$0.56 million, or 30% of total industry wages and salaries.
- *Direct* and *indirect* effects of music industry spending produce \$2.46 million in Yukon labour income, which represents 88% of the industry's positive impact on GDP.
- Employment generated by the industry totals 192 person-years when music industry employment (109) is combined with the direct and indirect effects of its expenditures (83).

Impact of one dollar of spending by the Yukon music industry

- Each \$1 expenditure made by the Yukon music industry increases Yukon's GDP by 32¢, when direct and indirect economic effects are considered. Of this 32¢, 28¢ is in the form of additional Yukon labour income. The number of jobs created by the industry is 9.3 person-years per \$1 million expenditure. Of every \$1 spent by the industry, 31¢ is spent out of the Yukon.

Industry revenues and expenditures

- Yukon artists and service providers received \$8.29 million in revenues in 2005. Service providers received \$5.5 million, or 66% of total industry revenue, while artists received \$2.79 million, or about 34% of total revenue.
- Yukon music industry expenditures in 2005 totalled \$8.86 million. These were fairly evenly divided between salaries and wages (\$1.90 million, or 21%), equipment (\$1.76 million, or 20%), industry-related outsourced professional services (\$1.71 million, or 19%), and office and business expenses (\$1.66 million, or 19%). Service provider expenditures, at \$5.26 million, are 46% more than artists' (\$3.6 million).
- Artist revenue from sales/performances and from music industry services constitutes close to \$2.48 million out of the \$2.79 million artists received in 2005, with industry funding (grants and government support) and loans/credit making up the remainder. For artists, the largest source of revenue by far is live performance fees (\$1.82 million).
- Outsourced professional services are the area of greatest expenditure for artists (\$927,000). Of artists' total non-salary expenditures, 51% (\$1.43 million) was spent in the Yukon.
- Overall revenues and expenditures are higher for service providers than for artists. When financing and funding are included, service providers received \$5.5 million in revenue in 2005. Manufacturing, renting, selling, repairing, or servicing music instruments/accessories, and teaching music, altogether account for one-half of 2005's total service provider revenues.
- Service providers' greatest expenditures in 2005 were \$1.24 million for office and other business expenses, \$1.04 million on equipment, and \$1.12 million on salaries and wages. Service providers spent 67% of their total non-salary expenditures in the Yukon.

Sources of financing

- **Grants / government funding** – Total funding reported was \$2.08 million for both artists and service providers. (Note that this figure, extrapolated from respondent data, may differ somewhat from the actual amounts accounted for by the funding agencies.)
- Among Yukon-based funders, the Government of the Yukon was credited with providing the most: almost \$820,000. The Yukon Arts Funding program (nearly \$180,000) and the Community Development Fund (just over \$124,000) follow. Among national or other funders, FACTOR provided just over \$231,000, while Arts Presentation Canada provided \$112,000.
- Some 15% of artists received funding from grants or government sources and about 27% of service providers received such funding.
- **Loans / credit** – The music industry in Yukon received more than \$242,000 overall in loans and credit in 2005. Service providers received a larger share of this financing (54%) than did artists (46%).
- Eight percent of artists surveyed reported receiving loans or credit, for a total of just over \$111,000. By comparison, 9% of service providers surveyed reported receiving loans or credit in 2005, for a total of nearly \$132,000.

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 45 under *Scope and definition of industry*, in *Appendix B*).
- **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** or 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 the Yukon. Capturing this data was an important part of this study’s methodology, because territorial economic impact can only be calculated on Yukon-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 territory 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 territory 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** refer 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 Yukon 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 refer to royalties paid for the reproduction of songs
- **P.A. 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.
- **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 our 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 45 under *Scope and definition of industry*, in *Appendix B*).
- **Synchronization Rights:** This is 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** are 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, 2001-2002*; Northwest Territories Bureau of Statistics, *NWT Input-Output Model: An Overview*, June 2006; Manitoba Bureau of Statistics, and *Manitoba Economic Multipliers*, 2004.

Yukon music industry profile and economic impact

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

The industry profile begins with the size of the music industry in Yukon, 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 Yukon 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 territory.

Finally, this section shows how the industry can be broken out by music genre or by different aspects of the music industry. This shows which genres or aspects are largest/most active, and captures niches and sub-genres that characterize the diversity of artists in the territory.

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 Yukon music industry

Music industry activity

Figure 2 below provides a breakdown of the numbers of artists and service providers operating as part of the Yukon music industry. The music industry in the Yukon 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 123 in the sub-category of solo artists *does* correspond to 123 *persons* in that sub-category, the count of 40 in the sub-category of music instructors signifies 40 *entities* providing music instruction, some of which are businesses or other organizations employing a number of individuals.

Figure 2 YUKON MUSIC INDUSTRY – COUNTS BY CATEGORY

Category	Sub-category	Count
Artists	Solo artist/DJ	123
	Groups	57
	Gear/instruments	9
Service providers	Communications, design, promotions and radio tracking firms	17
	Music instructors	40
	Music organizations	3
	Production companies, publishers, record companies and distributors	4
	Recording studios	11
	Venues	28
Total		292

Note: The figures in this table should *not* be interpreted as FTE employment counts.

Group size

The following Figure 3 provides a breakdown of the Yukon music industry by group size. Group artists (as distinct from solo artists) range in size from two to 24 members; however, the average group size is 5.2 members.

Figure 3 GROUP SIZE

Group make-up	Number of groups	Percent of artists
Solo artists	123	68%
2 members	3	2%
3 members	10	6%
4 members	23	13%
5 members	12	7%
6 members	2	1%
7 members	0	0%
8 members or more	7	4%
Total	180	100%

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

In total, the Yukon's 57 groups (i.e., artist-entities having two or more members) have an active membership of 298. Thus, the artist segment of the Yukon's music industry at present comprises some 421 "roles" for solo artists (123) and group members (298). 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.

Economic impact analysis

The breadth of data gathered in this study allows estimates to be made of the total impact of the Yukon music industry on the territory'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* to this report.

Summary of economic impact

Figure 4, below, summarizes the impact of the Yukon music industry on the territory's economy in 2005. 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 2002 multipliers provided by the Yukon Department of Economic Development. Further details are found in *Appendix B* to this report, under the heading "Economic impact analysis – method and rationale".

Figure 4 SUMMARY OF ECONOMIC IMPACT ON YUKON ECONOMY, 2005

Economic measure		Artists	Service providers	Total
Total expenditures		\$3,595,190	\$5,259,927	\$8,855,116
Total expenditures in Yukon		\$2,207,090	\$3,910,437	\$6,117,527
Total adjusted expenditures in Yukon (purchaser prices) ¹		\$1,357,248	\$2,107,636	\$3,464,883
Margins and taxes ²		\$40,866	\$79,797	\$120,663
Total adjusted expenditures in Yukon (producer prices) ¹		\$1,316,382	\$2,027,839	\$3,344,221
Total direct impacts	GDP at market prices	\$946,702	\$1,354,499	\$2,301,201
	GDP at basic prices	\$947,338	\$1,358,456	\$2,305,794
	Government net revenues	\$(636)	\$(3,957)	\$(4,593)
	Yukon total labour income	\$878,487	\$1,250,595	\$2,129,081
	Employment (person-years) ³	30.1	43.0	73.2
Total open (type I) impacts (direct + indirect)	GDP at market prices	\$1,121,281	\$1,675,757	\$2,797,038
	GDP at basic prices	\$1,119,788	\$1,673,084	\$2,792,872
	Government net revenues	\$1,494	\$2,673	\$4,166
	Yukon total labour income	\$991,645	\$1,472,188	\$2,463,833
	Employment (person-years)	33.7	48.7	82.5
Total employment generated ³		89.3	102.5	191.9

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

¹ The adjustments correct for double counting of expenditures, such as in cases where expenditures of one Yukon music industry participant go to another Yukon music industry participant whose own expenditures are also recorded.

² 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.

³ Total employment generated is based on the number of employees working for music industry artists and service providers, plus directly and indirectly generated employment. Direct and indirect employment figures are based on the number of person-years of employment generated by suppliers of the music industry and, as such, do not include employment for the Yukon music industry itself.

Music industry expenditures

As the above Figure shows, the music industry spends \$8.86 million, of which \$6.12 million (69%) is spent in Yukon. Service providers typically spend a higher proportion of their expenditures in Yukon (74%, or \$3.91 million out of \$5.26 million) than do artists (61%, or \$2.21 million out of \$3.6 million). Overall expenditures and the share spent outside Yukon (“direct leakage”) are depicted in Figure 5 below.

Of the \$6.12 million spent in the Yukon, \$2.65 million is internal to the Yukon industry, while \$3.46 million goes to producers that supply the local industry. Just over \$0.12 million is levied on top of the producers’ prices in the form of indirect taxes and retail, wholesale, and transportation margins. The \$3.34 million of output supplied to the music industry generates the net economic impact that is measured here.

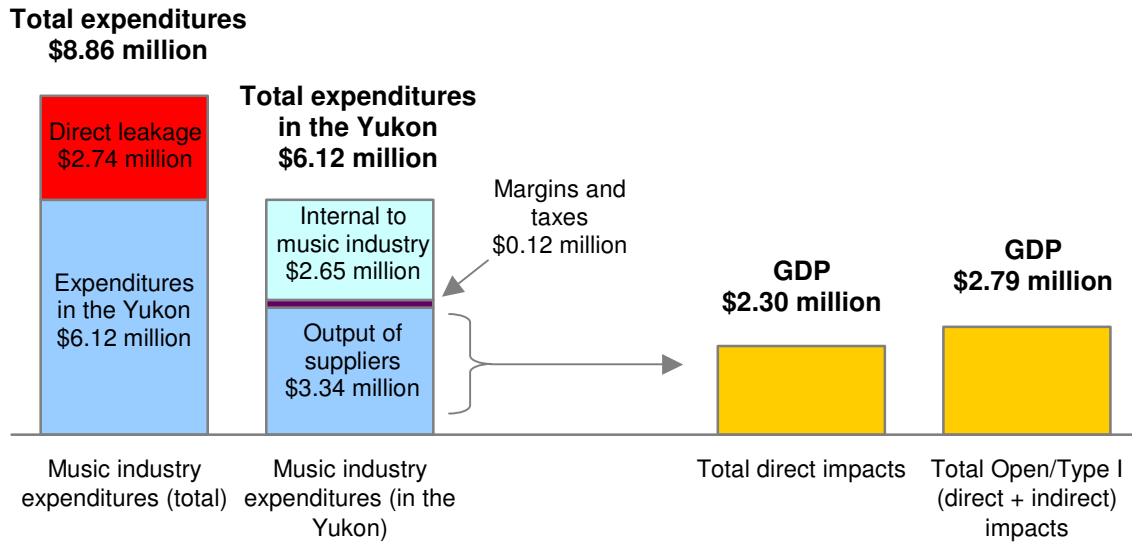
Considerable further detail on music industry expenditures is provided in the appropriate sections further on in this report (starting on page 22). Those sections immediately following this one describe in further detail the economic impact of the expenditures on the Yukon economy.

Impact on Yukon GDP

Spending in the Yukon produces both direct and indirect (or “spin-off”) effects that benefit the Yukon economy. As shown in Figure 4 above, the sum of these effects (as a result of such spending) is a net positive impact of \$2.79 million on the territory’s GDP. To put this figure in perspective, \$2.79 million represents about 0.18% of the Yukon’s 2005 GDP of \$1.522 billion (Statistics Canada, 2005 Preliminary GDP at market prices in current dollars, April 2006). 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* to this report), though the consumer spending behind such effects undoubtedly produces additional benefits for the territory’s GDP.

Figure 5 GDP IMPACT OF EXPENDITURES BY YUKON'S MUSIC INDUSTRY, 2005



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

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 over \$2.46 million in Yukon labour income. This represents over 88% of the industry's positive impact on GDP.

Employment generated by the industry totals 192 person-years when music industry employment is combined with the direct and indirect effects of its expenditures. Though not directly comparable, employment data for the Yukon (Yukon Department of Economic Development, Yukon Economic Update, 2006) shows 15,567 persons employed on average in 2005.

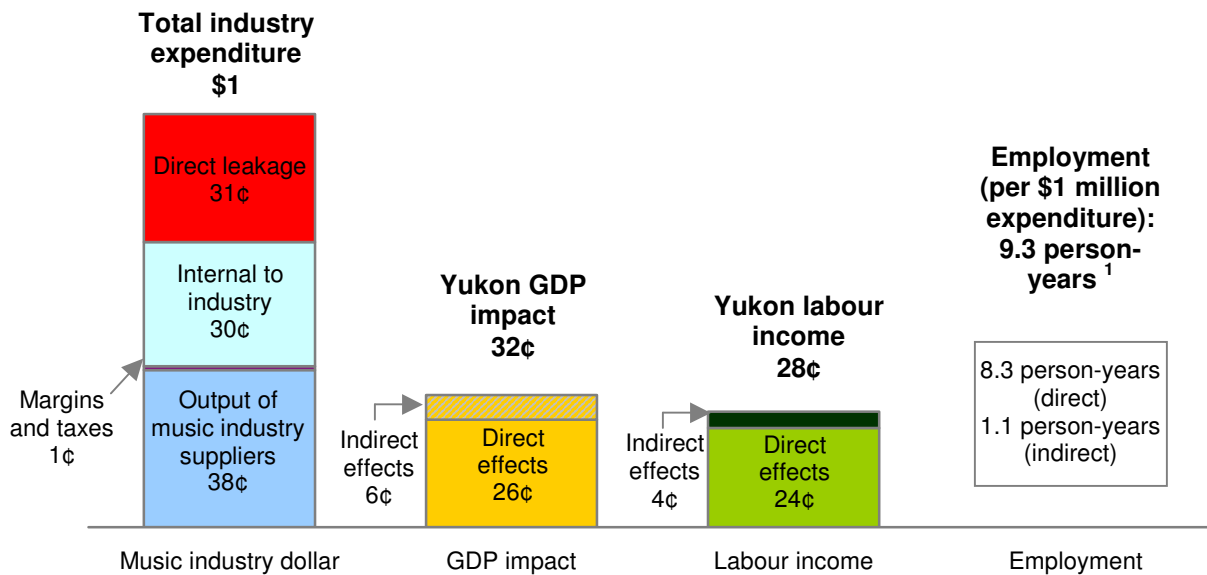
Impact of one dollar of spending by the Yukon music industry

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

On average, about 38¢ of every dollar spent by the industry benefits non-industry local suppliers, while the remainder flows out of the territory through direct leakage (31¢), goes to other Yukon music industry members (30¢), or goes to taxes and margins (1¢). When direct and indirect economic impacts are taken into consideration, this increases Yukon’s total GDP by 32¢.

The benefit of each \$1 expenditure in terms of Yukon labour income (i.e., wages and salaries) is 28¢. The number of jobs created by the industry is 9.3 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, 2005



Note: For a definition of terms, please see the *Glossary of terms* that precedes this report section. Methodological considerations are discussed in *Appendix B*. Totals may not equal the sum of their components due to rounding.

¹ 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 Yukon music industry

The following sections present employment and wage information related to the Yukon music industry. This includes an estimate of employment in the industry (based on 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 exactly to the same number of *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.

Artists employ 56 FTE positions, representing 51% of industry employment. Followed next are venues with 19 FTE positions (17%) and music instructors with 14 FTE positions (13%). In total, the industry is estimated to employ 109 FTE positions.

Figure 7 YUKON MUSIC INDUSTRY EMPLOYMENT (FTE) BY BUSINESSES

Industry Role		Total		
		Average number of FTE employees	Total FTE employment	Percent of total industry employment
Artists		4	56	51%
Service providers	Venues	1	19	17%
	Communications, promotions, design and radio tracking	<1	3	3%
	Recording Studios	1	4	3%
	Music Instructors	1	14	13%
	Gear / Instruments	2	8	7%
	Production Companies, Publishers, Record Companies and Distributors	1	3	3%
	Music Organizations	2	3	3%
Total for industry		2	109	100%

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 Yukon 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, 35% 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 communications, design, promotions and radio tracking segment is another exception. Although they provide services to the music industry, many employees in this category (such as graphic designers and photographers) have no necessary connection to music *per se*. Therefore, in this category, it is understandable that only 11% of the average firm's employment is directly related to the music industry.

Wages in the Yukon music industry

The Yukon music industry produced \$1.9 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 was from employment created by service providers, at \$1.12 million (59%), compared to just over \$775,000 from employment created by artists (41%).

The largest generators of wages and salaries in the industry apart from artists were venues, at over \$0.57 million (30%). In comparison, referring back to Figure 7 above, venues accounted for 17% of total employment in the Yukon music industry.

Figure 8 YUKON 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	\$55,438	\$775,168	41%	
Venues	\$37,543	\$566,031	30%	
Service providers	Communications, promotions, design and radio tracking	\$3,823	\$35,452	2%
	Music Instructors	\$17,487	\$182,470	10%
	Music Organizations	\$98,749	\$148,124	8%
	Gear / Instruments	\$22,333	\$100,500	5%
	Recording Studios	\$10,884	\$44,897	2%
Production Companies, Publishers, Record Companies and Distributors	\$17,500	\$46,667	2%	
Total for industry	\$30,854	\$1,899,307	100%	

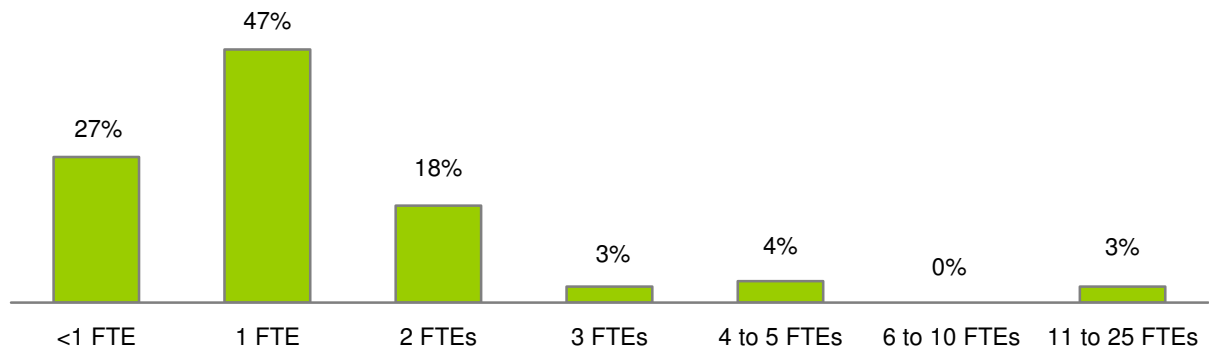
Note: The figures reported in this table are based on respondent-provided payroll data. Percentage totals may not equal 100% due to rounding.

Distribution of full-time equivalent employment

Figure 9 below presents the distribution of FTE employment as a percentage of businesses or organizations in the Yukon music industry. Nearly half (47%) have one full-time equivalent position, while 27% employ fewer than this number. The vast majority (91%) employ fewer than 3 FTEs.

Again, it should be remembered that “full-time equivalents” does not mean “full-time employees.” In Figure 9, for example: 47% of businesses report having one FTE. This is an intelligible finding concerning artists (which accounted for 56 FTEs – see Figure 7 above), because many groups have a few members who work part-time, and are therefore equivalent to one full-time employee.

Figure 9 BREAKDOWN OF EMPLOYMENT ON FTE BASIS

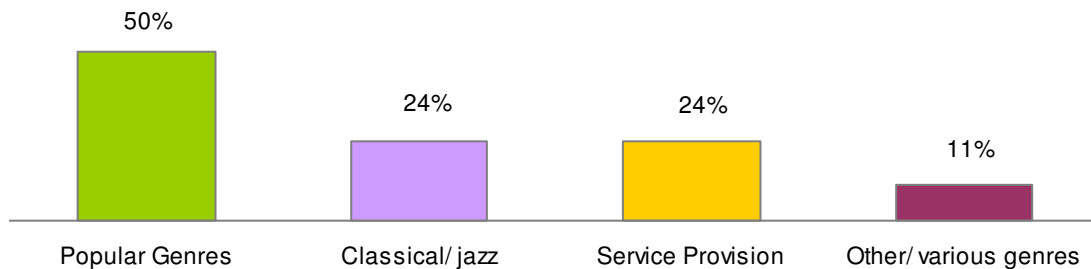


Note: Percentage totals may not equal 100% due to rounding.

Industry by music industry aspect or genre

Respondents were asked to consider their overall involvement in the Yukon music industry and identify the musical genre or aspect of the music industry they are most involved with. Multiple responses were accepted. Figure 10 below depicts the Yukon music industry according to three broad music industry genres (popular genres, classical/jazz, and other/various) and service provision. Popular genres account for 50% of the Yukon music industry, classical/jazz for 24%, and other/various for 11%. Service provision comprises 24% of the industry. Figure 11 provides additional detail about these genre categories.

Figure 10 MUSIC INDUSTRY BY ASPECT OR GENRE



Note: Percentages exceed 100% because multiple responses were accepted.

Figure 11 YUKON MUSIC INDUSTRY BY ASPECT OR GENRE

Category	Genre	Percent	Category percent
Popular genres	Folk / acoustic	14%	50%
	Rock / rock & roll / indy rock	10%	
	Roots	7%	
	Electronic / dance / DJ	4%	
	Blues / blues-rock	3%	
	Folk rock / Celtic rock / pub music	3%	
	Punk rock	3%	
	Bluegrass	2%	
	Country / old-time country	2%	
	Country Rock	2%	
	Hard rock / grunge / heavy metal	2%	
	Hip hop	2%	
	Pop / pop-rock	2%	
	World beat / ethnic	2%	
	Children's music	1%	
	Gospel	1%	
Reggae	1%		
R&B	1%		
Classical / jazz	Jazz / swing	17%	24%
	Classical	8%	
Other / various genres	Singer/songwriter	4%	11%
	Musical/performance theatre	3%	
	Various / all genres	3%	
	Singer	1%	
	Other / refused	1%	
Service provision	Teaching music	9%	24%
	Graphic design	3%	
	Instrument repair and servicing	2%	
	Presentation (venue)	2%	
	Promotion	2%	
	CD manufacturing	1%	
	Distribution	1%	
	Management / consultant	1%	
	Music production	1%	
	Organization / administration	1%	
	Photography	1%	
	Recording (studio)	1%	
	Retail/ sales	1%	
Sound, light, technical services	1%		

Note: Percentages exceed 100% because multiple responses were accepted.

Industry revenues and expenditures

Music industry overview

In 2005, the Yukon music industry, as indicated by the following figures, played a significant role in the overall strength of the territory's economy. This section of the report provides an overview of the Yukon 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 other business expenditures, equipment, travel and transportation, site-related costs, salary and wages, and other miscellaneous costs). 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 292. 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 2006 is estimated at \$8.29 million (Figure 12).

As illustrated below, service providers (e.g., businesses and venues) received the most revenue: \$5.5 million, or approximately 66% of the total. Artists, on the other hand, received \$2.79 million each year, or approximately 34% 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) was included in the calculation of artist and service provider revenue overall.

Figure 12 OVERVIEW OF TOTAL INDUSTRY REVENUE

Category	Total revenues	Percent
Service providers	\$5,500,059	66%
Artists	\$2,790,370	34%
Total	\$8,290,429	100%

Note: Revenue figures include financing and agency / government funding.

Overview of music industry expenditures

The Yukon music industry is an important contributor to economic activity. The estimated total of all expenditures for artists and service providers in 2005 is nearly \$8.86 million (Figure 13).

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

The largest share of music industry expenditures in the Yukon comes from salary and wages, at \$1.90 million; followed by equipment (\$1.76 million), outsourced professional services (\$1.71 million), and office and other business expenditures (\$1.66 million).

Service providers' expenditures, at \$5.26 million, exceed those of artists (\$3.6 million). However, there are two categories in which artist costs exceed service provider costs: outsourced professional services, and travel and transportation.

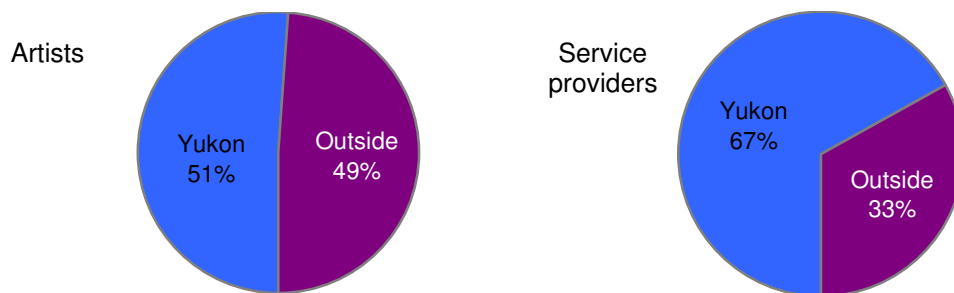
Figure 14 shows the share of non-salary expenditures of each artists and service providers that were spent in the Yukon. Service providers typically purchase a greater share of their expenditures (67%) in the Yukon than do artists (51%).

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 Yukon

Figure 13 OVERVIEW OF TOTAL INDUSTRY EXPENDITURES

Expense category	Artists	Service providers	Total
Equipment	\$716,686	\$1,040,041	\$1,756,727
Outsourced professional services	\$926,612	\$788,333	\$1,714,945
Office and other business expenditures	\$421,279	\$1,242,305	\$1,663,584
Travel and transportation	\$626,679	\$542,716	\$1,169,395
Site-related costs	\$128,462	\$505,533	\$633,995
Other expenditures	\$304	\$16,860	\$17,164
Subtotal	\$2,820,022	\$4,135,788	\$6,955,810
Salary and wages	\$775,168	\$1,124,139	\$1,899,307
Grand total	\$3,595,190	\$5,259,927	\$8,855,116

Figure 14 TOTAL NON-SALARY EXPENDITURES – PERCENTAGE SPENT IN THE YUKON



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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 (6%) of artists had revenues over \$50,000 in 2005, whereas a greater proportion (21%) of service providers did. Similarly, a much larger proportion of service providers (54%) had expenditures (including salaries/wages) over \$10,000 in 2005, 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	8%	9%	2%	7%	2%	3%
\$1 to \$500	11%	1%	17%	10%	17%	6%
\$501 to \$1,000	10%	0%	11%	10%	11%	11%
\$1,001 to \$5,000	40%	20%	31%	13%	31%	14%
\$5,001 to \$10,000	10%	20%	15%	13%	15%	12%
\$10,001 to \$50,000	15%	29%	18%	29%	17%	32%
\$50,001 to \$100,000	3%	9%	3%	8%	3%	11%
\$100,001 to \$500,000	2%	9%	3%	11%	4%	11%
\$500,001 to \$1,000,000	1%	3%	0%	0%	0%	0%
Total	100%	100%	100%	100%	100%	100%

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 \$2.48 million out of \$2.79 million received in 2005, 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 \$1.82 million, is more than 10 times the amount from the next largest source, fees from performing rights organizations (approximately \$147,000).

The only other sales/performance-related source that yielded more than \$100,000 for artists in 2005 is advances on a record or distribution deal (\$113,889). Revenue from sales and distribution of CDs/tapes/recordings was \$99,000.

All other sales/performance revenue sources combined account for approximately 7% of total artist revenues (e.g., mechanical royalties, promotional merchandise sales, commissions and fees for composing music/lyrics or other publishing revenue, royalties on record sales, and per diems from a group or a record label).

Figure 16 ARTIST REVENUES– SALES/PERFORMANCE

Source of revenue	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Live performance fees	88%	\$11,461	\$2,000	\$1,817,448	78%
Payments from performing rights organizations such as SOCAN, BMI or ASCAP	19%	\$4,349	\$400	\$146,660	6%
An advance on a record or distribution deal	2%	\$37,500	\$37,500	\$113,889	5%
Selling or distributing CDs, tapes, or other recordings of your music	25%	\$2,186	\$500	\$99,042	4%
Mechanical royalties	6%	\$4,013	\$1,000	\$43,925	2%
Synch fees and licensing fees	5%	\$4,405	\$284	\$40,834	2%
Commissions or fees for composing music or lyrics or other publishing revenue	3%	\$6,625	\$600	\$40,241	2%
Studio session fees	9%	\$728	\$500	\$12,271	1%
Royalties from your record sales	3%	\$1,683	\$992	\$10,225	<1%
A per diem or salary from your record label or group	5%	\$901	\$440	\$8,208	<1%
Selling promotional merchandise	5%	\$311	\$150	\$2,933	<1%
Total	91%	\$14,317	\$2500	\$2,335,675	100%

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%. Only solo artists provided revenue data under the category of “A per diem or salary from your record label or group.”

Artist revenues – music industry services

Only \$143,000 of the total \$2.79 million in 2005 artist revenue 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 Yukon artists than do revenues earned directly through sales and performance. However, even though total service-related revenues are less than sales/performance revenues, many artists are actively providing revenue-producing music industry services. Figure 17 below sums up.

The largest source of service-related revenue is teaching music, which produced over \$69,000 in 2005. Revenues in the remaining sub-categories were considerably less. Operating a sound recording studio yielded over \$31,000. Professional services, such as website design, legal, or accounting services produced about half that amount (\$15,793). Artists reported no revenue from commissions on promotional merchandise for another artist or from publishing or licensing another artist’s music.

Figure 17 ARTIST REVENUES FROM MUSIC INDUSTRY SERVICES

Source of revenue	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Teaching music	17%	\$2,264	\$632	\$69,465	49%
Operating a sound recording studio	2%	\$10,400	\$10,400	\$31,585	22%
Professional services, like website design, legal or accounting services	3%	\$3,467	\$250	\$15,793	11%
Managing, booking, or promoting an artist other than yourself	3%	\$2,233	\$500	\$10,174	7%
Technical services like doing sound or lighting for live music performances	8%	\$468	\$200	\$6,466	5%
Renting out rehearsal space or studio space	1%	\$3,600	\$3,600	\$5,467	4%
Manufacturing, renting, selling, repairing or servicing music instruments or accessories	2%	\$375	\$375	\$1,139	1%
Arranging other artists’ music	2%	\$400	\$400	\$1,215	1%
Commissions for providing talent for a live music venue or festival	1%	\$800	\$800	\$1,215	1%
Engineering, producing, manufacturing or distribution another artist’s sound recording	1%	\$200	\$200	\$304	<1%
Commissions on promotional merchandise for another artist	0%	\$0	\$0	\$0	0%
Publishing or licensing another artist’s music	0%	\$0	\$0	\$0	0%
Total	26%	\$3,004	\$800	\$142,822	100%

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, office and other business expenditures, and site-related expenses.

Artist expenditures total over \$3.59 million *including* salaries and wages, or \$2.82 million when salaries/wages are left out. Artists spent the most on outsourced professional services: over \$926,000.

Excluding salaries/wages, the second largest expense for artists was equipment (over \$716,000), followed by travel and transportation (over \$626,000) and office and other business expenditures (\$421,000).

In the past year, artists allocated over \$775,000 toward salaries/wages, which is less than that allocated to outsourced professional services, but more than that allocated to equipment costs.

Artist expenditures - equipment

Artist expenditures on equipment amounted to slightly more than \$716,000 in 2005, which is approximately 25% of total artist expenditures overall excluding salary and wages. Artists are responsible for 41% of total equipment expenditures in the music industry.

The heaviest equipment expenditures for artists, as one might anticipate, were direct spending on musical instruments and accessories (\$406,000), followed by tents, staging, halls, building or other venue rentals (over \$142,000).

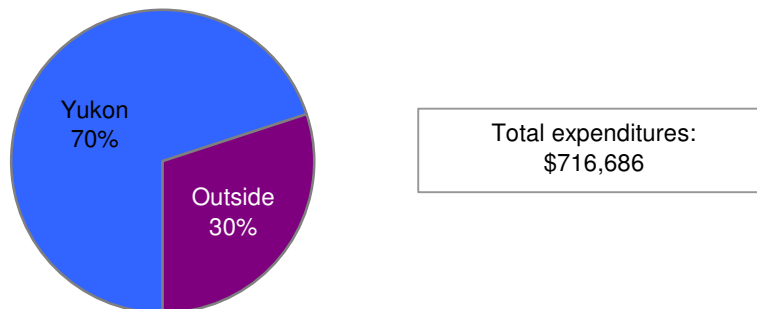
Figure 18 ARTIST EXPENDITURES – EQUIPMENT

Source of expenditures	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Musical instruments and accessories	55%	\$4,093	\$1,093	\$406,225	57%
Tents, staging, halls, building or other venue rentals	6%	\$12,826	\$700	\$142,414	20%
DJ equipment and accessories, such as CD or MP3 players, turntables, effects, etc.	7%	\$4,158	\$1,658	\$51,828	7%
Equipment and musical instrument repair and maintenance	50%	\$403	\$200	\$36,095	5%
Recording equipment and accessories, including recorders, mixers, etc.	18%	\$865	\$658	\$27,238	4%
Specialized hardware and software, including interfaces, controllers, etc.	12%	\$1,151	\$825	\$24,465	3%
Live sound reinforcement and P.A. or lighting equipment and accessories	14%	\$923	\$400	\$23,297	3%
Photographic equipment	5%	\$487	\$225	\$4,593	1%
CD duplication machinery	2%	\$175	\$175	\$531	<1%
Total	78%	\$5,131	\$1,289	\$716,686	100%

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 the Yukon (70%). Figure 19 below illustrates:

Figure 19 ARTIST EQUIPMENT EXPENDITURES – PERCENT IN THE YUKON



Artist expenditures – travel and transportation

Artists reported spending almost \$627,000 on travel and transportation in 2005. This represents 54% of the entire industry’s travel and transportation expenditures, and 22% of overall artist expenditures (excluding salary and wages).

Of the various subcategories of expenses under this heading, the leader is passenger/cargo vehicle purchase, rental, or leasing (\$161,000), followed by airfare (\$143,000), then vehicle operation, repair, and maintenance (\$140,000). Further details are shown in Figure 20 below.

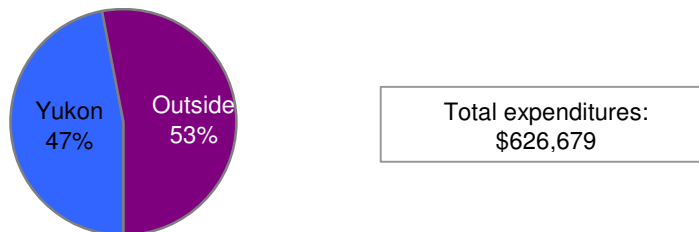
Figure 20 ARTIST EXPENDITURES – TRAVEL AND TRANSPORTATION

Source of expenditures	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Passenger or cargo vehicle/trailer purchase, rental, or leasing	11%	\$8,537	\$2,264	\$160,948	26%
Airfare	23%	\$3,441	\$2,000	\$143,253	23%
Vehicle operation, repair and maintenance, including registration, insurance, gas and oil	73%	\$1,066	\$450	\$140,382	22%
Hotel, motel or other accommodations	23%	\$2,311	\$800	\$96,559	15%
Out of town food and hospitality	31%	\$872	\$329	\$48,638	8%
Visa or work permit fees	3%	\$3,467	\$200	\$15,793	3%
Bus, taxi, and other ground transportation fares	17%	\$406	\$218	\$12,702	2%
Parking charges and toll fees	5%	\$420	\$100	\$3,889	1%
Conference and showcase fees	5%	\$405	\$300	\$3,755	1%
Shipping charges associated with out-of-town equipment needs	1%	\$500	\$500	\$759	<1%
Total	77%	\$4,495	\$700	\$626,679	100%

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 half of travel and transportation-related artist expenditures (53%) went outside of the Yukon, as shown below in Figure 21.

Figure 21 ARTIST TRAVEL / TRANSPORTATION EXPENDITURES – PERCENT IN YUKON



Artist expenditures – outsourced professional services

Artist expenses on outsourced professional services amounted to nearly \$927,000 in 2005, more than half (54%) of what the entire Yukon music industry spent in this area. Figure 22 below shows these expenditures broken down into subcategories. The largest is CD/DVD/tape recording or production, at over \$362,000, or 39% of the total. This is followed by costs for session players, sidemen, roadies, lighting/sound/merchandise, or other crew (\$207,000); and fees for advertising, promotion, and publicity (\$142,000).

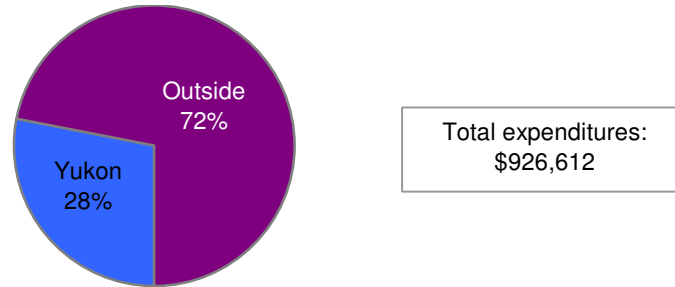
Figure 22 ARTIST EXPENDITURES – OUTSOURCED PROFESSIONAL SERVICES

Source of expenditures	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
CD / DVD / tape recording or production	18%	\$11,515	\$1,547	\$362,435	39%
Session players, sidemen, roadies, lighting / sound / merchandise or other crew	23%	\$4,936	\$2,000	\$207,038	22%
Fees for advertising, promotion, and publicity	24%	\$3,363	\$500	\$142,143	15%
Fees for graphics, web design video, or photography	15%	\$2,388	\$600	\$63,160	7%
All fees for grooming, image consulting, wardrobe purchase and upkeep	18%	\$1,127	\$500	\$36,839	4%
Legal and accounting services	14%	\$864	\$416	\$21,681	2%
CD / DVD / tape manufacturing	6%	\$1,905	\$1,800	\$20,855	2%
Vocal or instrumental coaching and other professional development fees	15%	\$650	\$250	\$18,072	2%
Union or other trade association dues	34%	\$220	\$47	\$13,614	1%
Sheet music and music books	36%	\$193	\$100	\$12,554	1%
Other outsourced or contract professional services from anyone who is not a full-time employee of your company	4%	\$1,453	\$750	\$11,489	1%
Agency fees and management fees	4%	\$1,167	\$168	\$7,275	1%
Non-travel related accommodation and hospitality	5%	\$520	\$510	\$4,741	1%
Merchandise purchase or production, including equipment purchases for resale	4%	\$525	\$284	\$3,273	<1%
Set dressing and design	3%	\$238	\$250	\$1,443	<1%
Total	70%	\$7,336	\$600	\$926,612	100%

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, 28% of artist expenditures on outsourced professional services stayed in the Yukon, and 72% went outside the territory.

Figure 23 ARTIST PROFESSIONAL SERVICES EXPENDITURES – PERCENT IN YUKON



Artist expenditures – office and other business expenditures

Artist expenses on office and other business expenditures were slightly more than \$421,000 in 2005, which is 15% of artist expenditures overall (excluding salary and wages), and 25% of office and business expenditures for the entire industry.

Of that \$421,000, the largest share (almost \$121,000, or 29%) went toward rent, including utilities. Common office expenditures, such as paper, postage, stationery printing, photocopying, telephone, fax, courier, long distance, etc., was another major expense, at over \$72,000 (17%). Computers took some \$53,000 or 13% of artist spending, while bank and other financial service fees amounted to just under \$51,000 (12%).

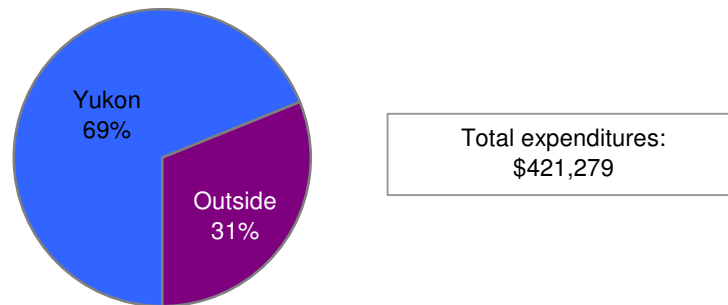
Figure 24 ARTIST EXPENDITURES – OFFICE AND OTHER BUSINESS EXPENDITURES

Source of expenditures	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Rent including utilities	22%	\$3,122	\$1,500	\$120,976	29%
Common office expenditures like paper, postage, stationery printing, photocopying, telephone, fax, courier, long distance, Internet, website hosting, etc.	52%	\$777	\$200	\$72,714	17%
Computers	16%	\$1,902	\$1,700	\$53,196	13%
Bank and other financial service fees including loan or credit card interest	24%	\$1,161	\$466	\$50,832	12%
Marketing costs	18%	\$1,232	\$300	\$38,768	9%
Tapes, CDs, DVDs, records and video purchases	35%	\$463	\$291	\$28,842	7%
All insurance costs	13%	\$626	\$400	\$14,661	3%
Office furniture	9%	\$640	\$244	\$9,825	2%
Artist label CD purchases	10%	\$556	\$500	\$9,814	2%
Funding and advance recoupment	1%	\$5,398	\$5,398	\$8,197	2%
Licensing fees	3%	\$1,407	\$200	\$6,408	2%
Artist fees	2%	\$1,984	\$2,169	\$6,339	2%
Duty, brokerage and import fees	3%	\$150	\$150	\$707	<1%
Total	68%	\$3,464	\$505	\$421,279	100%

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, 69%, remained in the Yukon, as Figure 25 below reveals.

Figure 25 ARTIST OFFICE EXPENDITURES – PERCENT IN YUKON



Artist expenditures – site-related expenditures

Artist expenditures on site-related costs total more than \$128,000, which is only 5% of overall artist expenditures (not including salary and wages), and 20% of total site-related costs in the Yukon music industry.

The most substantial site-related expenditure for artists was talent, technical and producer fees, at \$78,000+, or 61% of this category. Further details are shown in Figure 26 below.

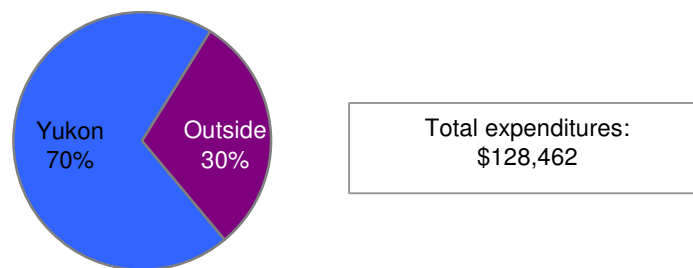
Figure 26 ARTIST EXPENDITURES – SITE-RELATED EXPENDITURES

Source of expenditures	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Talent, technical and producer fees	10%	\$4,534	\$2,500	\$78,595	61%
Backline, sound, lights and other production expenses excluding labour costs	6%	\$2,033	\$800	\$22,252	17%
SOCAN	7%	\$1,093	\$400	\$13,800	11%
Marketing, advertising and promotion specifically for live performances	9%	\$717	\$381	\$11,447	9%
Air, hotel and accommodation fees for live musical performances	4%	\$360	\$342	\$2,241	2%
On-site security	3%	\$28	\$28	\$125	<1%
Box office expenses, excluding labour costs	0%	\$0	\$0	\$0	0%
Total	24%	\$2,913	\$911	\$128,462	100%

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. 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%.

As displayed in Figure 27 below, 70% of site related expenses remained in the Yukon economy, while 30% went outside of the territory.

Figure 27 ARTIST SITE RELATED EXPENDITURES – PERCENT IN YUKON



Service provider revenues

Figure 28 below shows total service provider revenues by type of revenue. Service providers in the Yukon music industry received \$3.48 million in overall revenue in 2005. Readers should note that this amount excludes funding and financing revenues that, when added to this amount, increase total service provider revenues to \$5.5 million (see *Sources of Financing* section of this report for more information).

Manufacturing, renting, selling, repairing, or servicing music instruments/accessories, at over \$958,000, or 28%, was the largest source of service provider revenues for 2005. The second biggest source was teaching music (\$765,000); then, managing, booking, or promoting an artist (\$512,000).

Figure 28 SERVICE PROVIDER REVENUES

Source of revenue	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Manufacturing, renting, selling, repairing or servicing music instruments or accessories	7%	\$127,800	\$15,000	\$958,500	28%
Teaching music	41%	\$16,849	\$5,000	\$765,412	22%
Managing, booking, or promoting an artist	7%	\$66,055	\$25,000	\$512,430	15%
Ticket sales for live music	18%	\$14,158	\$3,664	\$279,855	8%
Technical services like sound or lighting for live music performances	10%	\$23,548	\$17,712	\$267,358	8%
Agency fees	5%	\$38,544	\$15,000	\$194,470	6%
Parking, food, refreshment and other income from live music performances	17%	\$6,513	\$7,048	\$127,008	4%
Engineering, producing, manufacturing or distributing a sound recording	8%	\$14,542	\$7,364	\$121,846	3%
Operating a sound recording studio	8%	\$10,372	\$5,771	\$87,900	3%
Rental income from your facility	2%	\$27,760	\$27,760	\$55,520	2%
Donations/ fund raising proceeds	6%	\$6,849	\$6,000	\$46,200	1%
Professional services, like website design, legal or accounting services	10%	\$3,522	\$1,400	\$39,102	1%
Sponsorship or advertising revenue for live music performances	3%	\$3,718	\$3,636	\$13,182	<1%
Publishing or licensing music	1%	\$6,000	\$6,000	\$8,000	<1%
Membership fees	1%	\$2,010	\$2,010	\$3,015	<1%
Building improvement fees	1%	\$2,000	\$2,000	\$2,750	<1%
Commissions for providing talent for a live music venue or festival	2%	\$1,000	\$1,000	\$2,000	<1%
Commissions on promotional merchandise	0%	\$0	\$0	\$0	0%
Arranging music	0%	\$0	\$0	\$0	0%
Renting out rehearsal or studio space	0%	\$0	\$0	\$0	0%
Total	88%	\$35,416	\$10,000	\$3,484,548	100.0%

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 nearly \$5.26 million *including* salaries and wages, and \$4.14 million when salaries/wages are not counted. Where artists spent the most on outsourced professional services (over \$926,000), office and other business-related expenses were the biggest expenditure category for service providers (at \$1.24 million). Other major service provider expenditures were salaries and wages (\$1.12 million), and equipment-related ones (\$1.04 million).

Service provider expenditures – equipment

Service providers reported spending \$1.04 million on equipment in 2005 (see Figure 29 below). Musical instruments and accessories account for half of that amount (\$531,000). This is much greater than the next highest equipment expenditure, which was live sound reinforcement and P.A./lighting equipment and accessories (over \$176,000). Nearly \$111,000 was spent on tents, staging, halls, buildings, or other venue rentals (11% of total equipment expenditures).

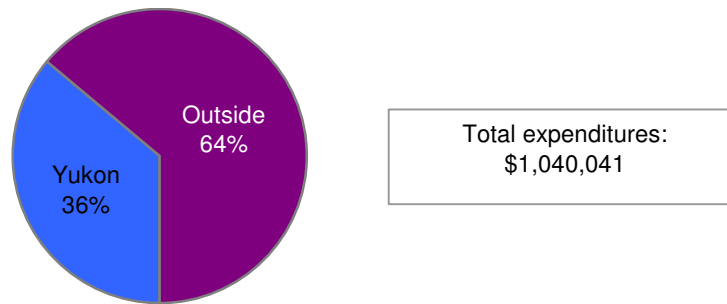
Figure 29 SERVICE PROVIDER EXPENDITURES – EQUIPMENT

Source of expenditures	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Musical instruments and accessories	34%	\$14,058	\$1,000	\$530,962	51%
Live sound reinforcement and P.A. or lighting equipment and accessories	22%	\$7,322	\$2,000	\$176,425	17%
Tents, staging, halls, building or other venue rentals	26%	\$3,821	\$2,000	\$110,913	11%
Recording equipment and accessories, including recorders, mixers, etc.	16%	\$4,608	\$1,000	\$84,680	8%
Specialized hardware and software, including interfaces, controllers, etc.	21%	\$2,466	\$999	\$57,439	6%
DJ equipment and accessories, such as CD or MP3 players, turntables, effects, etc.	8%	\$5,979	\$2,000	\$53,063	5%
Equipment and musical instrument repair and maintenance	46%	\$345	\$285	\$17,660	2%
CD duplication machinery	4%	\$1,164	\$800	\$5,210	1%
Photographic equipment	6%	\$564	\$300	\$3,689	<1%
Total	79%	\$11,767	\$2,811	\$1,040,041	100%

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%.

Unlike artists, most service provider equipment expenditures went outside of the Yukon (64%).

Figure 30 SERVICE PROVIDER EQUIPMENT EXPENDITURES – PERCENT IN YUKON



Service provider expenditures – travel and transportation

Service provider expenditures on travel and transportation were about \$543,000 in 2005, which is less than half (46%) of travel and transportation costs for the Yukon music industry overall. This represents 10% of service provider total expenditures.

As Figure 31 below shows, the largest amount in this category was spent on airfare – over \$213,000, or 39% of travel-related expenditures. Service providers spent half that amount on hotel/motel and other accommodations (\$110,000); and out of town hospitality took almost \$73,000, or 13% of their spending.

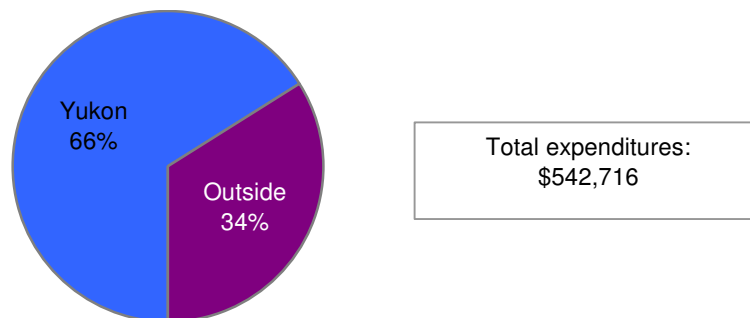
Figure 31 SERVICE PROVIDER EXPENDITURES – TRAVEL AND TRANSPORTATION

Source of expenditures	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Airfare	29%	\$6,480	\$2,500	\$213,423	39%
Hotel, motel or other accommodations	39%	\$2,542	\$1,167	\$110,205	20%
Out of town food and hospitality	33%	\$1,972	\$580	\$72,896	13%
Vehicle operation, repair and maintenance, including registration, insurance, gas and oil	36%	\$1,348	\$1,000	\$54,566	10%
Passenger or cargo vehicle or trailer purchase, rental, or leasing	18%	\$2,697	\$750	\$54,091	10%
Conference and showcase fees	14%	\$1,949	\$969	\$31,404	6%
Bus, taxi, or other ground transportation fares	14%	\$276	\$200	\$4,457	1%
Visa or work permit fees	4%	\$213	\$213	\$850	<1%
Parking charges and toll fees	8%	\$89	\$98	\$825	<1%
Shipping charges associated with out-of-town equipment needs	0%	\$0	\$0	\$0	0%
Total	55%	\$8,724	\$3,620	542,716	100%

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%.

An estimated two-thirds (66%) of service providers’ travel and transportation expenditures remained in the Yukon, with one-third being spent outside the territory (see Figure 32).

Figure 32 SERVICE PROVIDER TRAVEL / TRANSPORTATION EXPENDITURES – PERCENT IN YUKON



Service provider expenditures – outsourced professional services

As seen in Figure 33 below, service providers spent more than \$788,000 on outsourced professional services, which constituted 46% of total music industry expenditure on these services in 2005.

Of 15 sub-categories of outsourced professional services, session players, that of sidemen, roadies, lighting/sound/merchandise or other crew attracted the largest amount (nearly \$171,000). Fees for advertising, promotion, and publicity are the next biggest category (\$119,000), while slightly less went to outsourced or contract professional services (\$99,000+).

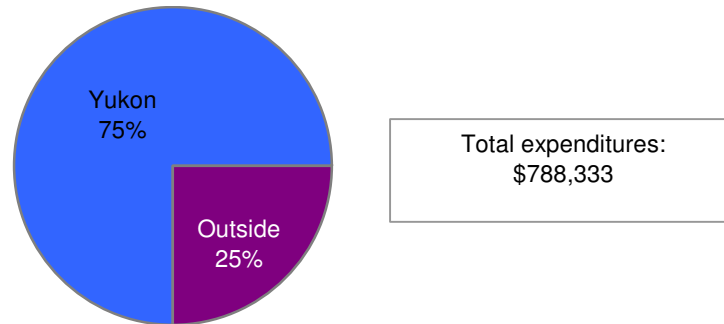
Figure 33 SERVICE PROVIDER EXPENDITURES – OUTSOURCED PROFESSIONAL SERVICES

Source of expenditures	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Session players, sidemen, roadies, lighting / sound / merchandise or other crew	24%	\$6,422	\$1,500	\$170,969	22%
Fees for advertising, promotion, and publicity	39%	\$2,718	\$300	\$119,199	15%
Other outsourced or contract professional services from anyone who is not a full-time employee of your company	16%	\$5,414	\$3,000	\$99,562	13%
Non-travel related accommodation and hospitality	22%	\$2,434	\$1,000	\$58,921	7%
Vocal or instrumental coaching and other professional development fees	11%	\$3,848	\$422	\$48,830	6%
Merchandise purchase or production*	9%	\$4,603	\$1,146	\$46,129	6%
Legal and accounting services	24%	\$1,687	\$800	\$44,526	6%
Agency fees and management fees	4%	\$8,038	\$9,000	\$39,653	5%
CD / DVD / tape recording or production	10%	\$3,273	\$500	\$36,719	5%
Fees for graphics, web design, video, or photography	16%	\$1,989	\$350	\$35,808	5%
CD / DVD / tape manufacturing	5%	\$5,122	\$840	\$29,703	4%
Set dressing and design	5%	\$4,621	\$700	\$25,880	3%
Sheet music and music books	36%	\$452	\$275	\$18,118	2%
Union or other trade association dues	21%	\$342	\$100	\$8,009	1%
Fees for grooming, image consulting, wardrobe purchase and upkeep	15%	\$377	\$307	\$6,306	1%
Total	82%	\$8,612	\$1,107	\$788,333	100.0%

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. (*) Merchandise purchase or production includes purchases of equipment, such as musical instruments, for resale.

Unlike artists, most (75%) of what service providers spent on outsourced professional services was spent locally. Figure 34 below illustrates:

Figure 34 SERVICE PROVIDER PROFESSIONAL SERVICES EXPENDITURES– PERCENT IN YUKON



Service provider expenditures – office and other business expenditures

Office and other business expenditures related to the music industry represent the largest segment of Yukon service provider expenditures. As Figure 35 below shows, service providers spent more than \$1.24 million on office and other business expenditures in 2005, or 75% of the total under that heading.

Within the category of office and other business expenditures, service providers spent the most on artist fees, at \$466,000. Rent, including utilities, is the next highest expense, at roughly \$214,000.

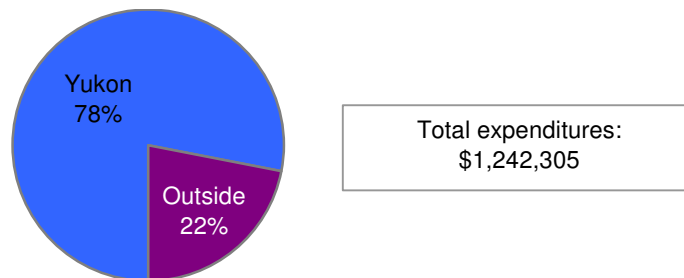
Figure 35 SERVICE PROVIDER EXPENDITURES – OFFICE AND OTHER BUSINESS EXPENDITURES

Source of expenditures	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Artist fees	9%	\$46,958	\$70,000	\$466,445	38%
Rent, including utilities	24%	\$8,128	\$3,744	\$214,127	17%
Common office expenses, like paper, postage, photocopying, telephone, fax, courier, long distance, Internet, etc.	67%	\$1,984	\$745	\$149,640	12%
Marketing costs, like press kits, photos, application fees	13%	\$8,688	\$3,950	\$122,428	10%
Tapes, CDs, DVDs, records and video purchases	39%	\$2,107	\$250	\$92,061	7%
Computers	24%	\$1,965	\$1,934	\$51,993	4%
All insurance costs	29%	\$1,346	\$980	\$44,138	4%
Artist label CD purchases	9%	\$3,497	\$240	\$33,848	3%
Bank and other financial service fees including loan or credit card interest	34%	\$828	\$348	\$31,056	2%
Office furniture	15%	\$833	\$301	\$14,357	1%
Licensing fees	9%	\$1,460	\$239	\$14,200	1%
Duty, brokerage and import fees	9%	\$503	\$400	\$5,261	<1%
Building or office construction costs	1%	\$2,000	\$2,000	\$2,750	<1%
Funding and advance recoupment	0%	\$0	\$0	\$0	0%
Total	80%	\$13,796	\$2,846	\$1,242,305	100.0%

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 36 below shows, at 78%, most office and other business spending related to the music industry remained in the Yukon, with 22% being spent elsewhere.

Figure 36 SERVICE PROVIDER OFFICE AND OTHER BUSINESS EXPENDITURES—PERCENT IN YUKON



Service provider site-related expenditures

Service provider expenditures on site-related costs added up to over \$505,000, or 10% of overall service provider expenditures, in 2005. This amount also accounts for 80% of site related costs in the Yukon music industry overall.

These expenditures are detailed in Figure 37 below. The largest by far is the heading of talent, technical, and producer fees, which amounts to \$382,000 of site-related expenditures (76%). The next highest site-related expense is for backline, sound, lights, and other production expenses (nearly \$60,000, excluding labour costs).

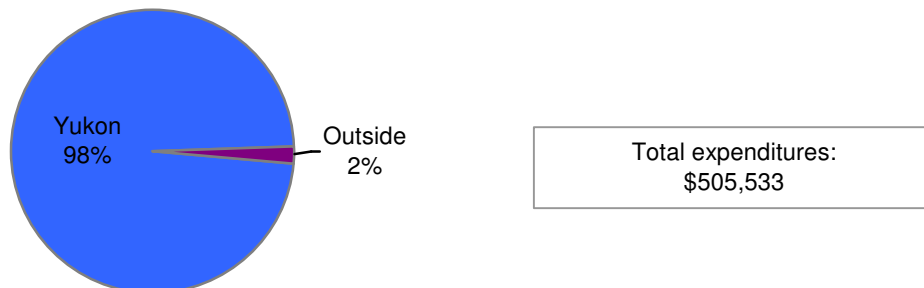
Figure 37 SERVICE PROVIDER SITE-RELATED EXPENDITURES

Source of expenditures	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Talent, technical and producer fees	21%	\$16,434	\$5,500	\$382,160	76%
Backline, sound, lights and other production expenses <i>excluding</i> labour costs	11%	\$4,821	\$876	\$59,682	12%
Air, hotel and accommodation fees for live musical performances	7%	\$4,920	\$3,100	\$37,805	7%
Marketing, advertising and promotion specifically related to live musical performances	10%	\$1,322	\$707	\$14,435	3%
SOCAN	12%	\$826	\$500	\$10,781	2%
Box office expenses, excluding labour costs	1%	\$447	\$447	\$671	<1%
On-site security costs	0%	\$0	\$0	\$0	0%
Total	31%	\$14,331	\$5,000	505,533	100.0%

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. 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%.

Although site-related expenditures are a relatively small proportion of total service provider expenditures, 98% remained in the Yukon.

Figure 38 SERVICE PROVIDER SITE RELATED EXPENDITURES – PERCENT IN YUKON



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

Figure 39, below, shows the funding that artists and service providers reported receiving from numerous government sources in 2005. The Government of Yukon (program unspecified) was the largest sponsor of funding to artists and service providers in the Yukon, at almost \$820,000. FACTOR and the Yukon Arts Funding Program provided approximately \$200,000 each.

The majority of Yukon based funders are departments, programs or funds financed wholly by the Government of the Yukon. When combined, such funders are responsible for over two-thirds (68%) of the total funding received.

Caution should be exercised in reading and interpreting the grant and government funding data shown in Figure 39, since such data was provided by artists and service providers rather than by the funding agencies from which the grants actually originate. Please refer to the note under the Figure for further discussion.

Based on survey findings, approximately 90% of total funding dollars reported went to service providers, while only 10% went to artists.

Figure 39 INDUSTRY FUNDING – GRANTS / GOVERNMENT SOURCES

		Source of funding	Industry total	Percent of Total
Yukon-based funders (\$1,492,333)	Yukon Government Funding Sources (\$1,415,599)	Government of Yukon (program unspecified)	\$819,526	39%
		Yukon Arts Funding Program	\$179,978	9%
		Community Development Fund	\$124,096	6%
		The Arts Fund	\$63,261	3%
		Lotteries Yukon	\$56,500	3%
		Lotteries Yukon's Advanced Artist Award	\$40,622	2%
		Tourism Yukon	\$30,500	1%
		On Yukon Time	\$22,500	1%
		Yukon Film and Sound Commission	\$21,809	1%
		Enterprise Trade Fund	\$21,150	1%
		Cultural Industries Training Fund	\$18,019	1%
		Yukon Department of Education	\$10,045	<1%
		Culture Quest	\$7,593	<1%
} 68%				
		Any municipal government	\$74,671	4%
		MusicYukon	\$2,063	<1%
National and other funders (\$592,290)	FACTOR		\$231,391	11%
	Arts Presentation Canada		\$112,090	5%
	Canada Council for the Arts		\$67,186	3%
	Corporations or corporate foundations		\$55,524	3%
	VideoFACT		\$37,963	2%
	Government of Canada (program unspecified)		\$22,000	1%
	Any other agency		\$13,441	1%
	Employment insurance		\$10,800	1%
	Head Start		\$10,655	1%
	Northwest Territories Dept. of Economic Development		\$10,600	1%
	Northwest Territories Dept. of Education		\$10,200	<1%
	Canadian Country Music Association		\$6,390	<1%
	Cultural Human Resources Council (CHRC)		\$4,050	<1%
	MUSICACTION		\$0	0%
Total			\$2,084,623	100%

Note: 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%.

Note that the above figures are extrapolations based on data provided by a sample of music industry respondents; thus, the figures may be somewhat different from the actual amounts provided by each funding agency. Furthermore, amounts received from some funders may be distributed across multiple categories. For example, some monies from the Film & Sound Commission's Professional Sound Recording Program are awarded through the Department of Economic Development; therefore, some respondents may have reported those funds as received from the Film & Sound Commission, while others may have cited the Department as the source.

Distribution of funding

As Figure 40 below shows, approximately 15% of artists and 27% of service providers received funding from grants or government sources. The average for the industry as a whole is 20%. Out of all Yukon-based agencies, artists' funding most often came from Yukon Film and Sound Commission, the Advanced Artist Award (of Lotteries Yukon), and the Enterprise Trade Fund (4% each).

Among service providers, 9% received funding from a municipal government source, and almost as many obtained funding either from the Cultural Industries Training Fund or the Yukon Arts Funding Program (8% each).

Of the 20% of the industry that received funding from a grant or government source, three-quarters (or 15% overall) received funding from the Yukon Government through at least one of its departments or programs. Eleven percent of artists received funding from the Yukon Government, as did 21% of service providers.

Figure 40 INDUSTRY FUNDING – DISTRIBUTION WITHIN YUKON

Source of Funding		Percent receiving funding		
		Artists	Service providers	
Yukon-based funding	Yukon Government Funding Sources	Cultural Industries Training Fund	1%	8%
		Yukon Arts Funding Program	1%	8%
		The Arts Fund	2%	5%
		Community Development Fund	1%	5%
		Government of Yukon (program unspecified)	1%	4%
		Tourism Yukon	0%	4%
		Enterprise Trade Fund	4%	3%
		Lotteries Yukon	0%	3%
		Lotteries Yukon Advanced Artist Award	4%	3%
		On Yukon Time	0%	2%
		Yukon Film and Sound Commission	4%	1%
		Yukon Department of Education	0%	1%
		Culture Quest	1%	0%
		Any municipal government	2%	9%
MusicYukon	0%	1%		
National and other funders	Canada Council for the Arts	1%	6%	
	Arts Presentation Canada	0%	5%	
	Corporations or corporate foundations	1%	5%	
	FACTOR	4%	5%	
	Government of Canada (program unspecified)	0%	4%	
	Cultural Human Resources Council (CHRC)	0%	2%	
	Employment insurance	0%	2%	
	Head Start	0%	2%	
	Northwest Territories Dept. of Economic Development	0%	2%	
	Northwest Territories Dept. of Education	0%	2%	
	Canadian Country Music Association	2%	0%	
	MUSICACTION	0%	0%	
	VideoFACT	1%	0%	
	Any other agency	1%	0%	
Total – those who received funding		15%	27%	
Total – no funding received		85%	73%	

Note: 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.

Loans and credit

Industry overall

As Figure 41 below shows, the Yukon music industry received more than \$242,000 in loans and credit in 2005. At nearly \$132,000, service providers received a slightly larger share of this financing (54%) than did artists (\$111,000, or 46%).

Figure 41 INDUSTRY – LOANS / CREDIT

	Artist total (\$)	Service provider total (\$)	Industry total (\$)
Total	\$111,156	\$131,604	\$242,760

Artist loans and credit

Figure 42 provides information on loans and credit received by artists. The first point to note, as the “Frequency” column reveals, is that only 8% of artists report receiving loans or credit in 2005. Most loan and credit funding came either from a business *other* than a financial institution, or from friends, family, or another private source.

Figure 42 ARTIST – LOANS / CREDIT

Source of loans/credit	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Business other than financial institution	2%	\$13,546	\$14,853	\$43,278	39%
Friends, family, other private sources	4%	\$4,500	\$2,000	\$34,167	31%
Financial institution	3%	\$6,000	\$6,000	\$27,333	25%
Scholarship or bursary	2%	\$2,100	\$2,100	\$6,378	6%
FACTOR loan	0%	\$0	\$0	\$0	0%
Total	8%	\$7,245	\$5,368	\$111,156	100%

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 43 provides information on loans and credit received by service providers. In common with artists, only 9% of service providers report getting loans or credit in 2005. Unlike artists, the largest source of loans and credit for service providers was financial institutions (64%, for a total value of slightly over \$84,000). Friends, family and other private sources did, however, provide the balance (36%).

Figure 43 SERVICE PROVIDER – LOANS / CREDIT

Source of loans/credit	Frequency	Mean (\$)	Median (\$)	Total (\$)	Percent of total
Financial institution	5%	\$15,075	\$15,417	\$84,167	64%
Friends, family, other private sources	4%	\$11,500	\$10,000	\$47,438	36%
FACTOR loan	0%	\$0	\$0	\$0	0%
Business other than financial institution	0%	\$0	\$0	\$0	0%
Scholarship or bursary	0%	\$0	\$0	\$0	0%
Total	9%	\$13,556	\$10,000	\$131,604	100%

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

Given the benchmark findings of this study, the questions that inevitably arise are, what will the Yukon music industry look like by this time next year, and how will that knowledge 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 2006 Economic Impact Assessment of the Yukon 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 184 members of the Yukon music industry, we can vouch for the acceptance, legitimacy, and repeatability of this approach.

The present study is also the most comprehensive 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 MusicYukon seeks to compare the 2006 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 Yukon 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** 2006 Economic Impact Assessment of the Yukon 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), previous music industry economic impact studies have seriously underestimated 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 Yukon 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 overview of the Yukon versus Manitoba music industries

In 2005, **kisquared** conducted an economic impact study of the 2004 Manitoba music industry on behalf of the Manitoba Audio Recording Industry Association (MARIA). In this section, the findings from the Manitoba study are compared with those from the present study of the 2005 Yukon music industry (conducted on behalf of MusicYukon). Figure 44 displays the key economic figures for the Yukon and Manitoba music industries.

Figure 44 COMPARATIVE DATA FOR THE YUKON AND MANITOBA MUSIC INDUSTRIES

Description	Yukon (2005)	Manitoba (2004)	Yukon as a percentage of Manitoba
GDP	\$1.52 billion	\$40.2 billion	4%
2001 Population	28,674	1,119,583	3%
Size of industry (artists and service providers)	292	1,082	27%
Overall employment (FTEs)	515	2,699	19%
Music industry-specific employment (FTEs)	109	1,775	6%
Overall salaries / wages	\$4,844,889	\$66,127,472	7%
Music industry-specific salaries / wages	\$1,899,307	\$40,092,430	5%
Expenditures (excluding all salaries)	\$6,955,810	\$74,881,676	9%
Total expenditures (including music industry-specific salaries)	\$8,855,116	\$114,974,106	8%
Percentage of non-salary artist expenditures spent in territory / province	51%	81%	-
Percentage of non-salary service provider expenditures spent in territory / province	67%	52%	-
Total industry revenue	\$8,290,429	\$107,880,046	8%
Percentage of funding dollars received by artists	10%	62%	-
Percentage of funding dollars received by service providers	90%	38%	-

Differences in population and GDP must be considered when making comparisons between the Yukon and Manitoba music industries. At over 28,000, the Yukon has less than 3% of the population that Manitoba has (1.12 million), while Yukon's GDP (\$1.5 billion) is close to 4% of Manitoba's (\$40.2 billion).

When considered in proportion to the general population, the Yukon has a considerably larger music industry than Manitoba. The total number of artists and service providers in the Yukon is approximately 27% of that in Manitoba.

Yukon's music industry employed 19% of the number employed by Manitoba's music industry. However, when only music industry-specific employees (for example, not including office managers, security, cleaning, or concession staff, whose work is required whether that venue's events are music related or not are considered), Yukon's music industry is about 6% of Manitoba's.

The Yukon music industry generated \$4.84 million in salaries and wages, which equates to 7% of that produced by the Manitoba music industry (over \$66 million). Salaries and wages dedicated to music industry-specific work comprised 39% of the Yukon music industry's overall salaries and wages, versus 60% in Manitoba.

The Manitoba music industry spent 35% of its total expenditures on music industry-specific salaries, while in the Yukon, 21% of the total expenditures went towards such salaries.

When salaries are excluded, the Yukon music industry expenditures total \$6.95 million or 9% of Manitoba's \$74.8 million.

Manitoban artists spent 81% of their expenditures in Manitoba, while only 51% of Yukon artists' expenditures remained in the territory. This relationship is reversed in the case of service providers: 67% of money spent by Yukon service providers stayed in the Yukon, yet only 52% of Manitoban service provider expenditures remained in the province.

The total of all revenues generated by Yukon artists and service providers in 2005 is \$8.29 million. This amount represents close to 8% of the total revenues received by Manitoba artists and service providers in 2004.

Of all the funding obtained by the Yukon industry, artists received 10% and service providers 90%. In comparison, Manitoban artists took in the majority of the funding at 62%, while service providers secured 38%.

Due to the different way in which employment data were used to calculate certain economic impact figures, some findings cannot be directly compared. However, estimates of what the Manitoba music industry economic impact would be if the Yukon methodology had been used place the Yukon music industry impact at about 5% of Manitoba's impact. Again if the same methodology had been used in the Manitoba study, employment generated (including direct and indirect impacts) by the Yukon music industry is estimated to be about 9% of Manitoba's. Note that this calculation includes the music industry-specific employment referred to in Figure 44, as well as spin-off employment generated.

Appendix B: Study parameters

Steering committee

Although MusicYukon was primarily responsible for the direction of this Economic Impact Assessment study, several other organizations were identified as research stakeholders from the outset. At the beginning of the study, therefore, a steering committee was formed to supervise and assist in the overall direction of the research to ensure appropriate levels of objectivity, industry expertise, and balance. The following is a list of the steering committee participants (in alphabetical order):

- **Derek Endress, Senior Business Development Advisor, Tourism & Culture, Department of Economic Development, Strategic Industries, Yukon Government**
- **Debbie Peters, Magnum Opus Management**
- **George W. Marchewa, Senior Economist, Economic Development, Yukon Government**
- **Iris Merritt, Film Officer, Yukon Film and Sound Commission**
- **Margarita Ramon, Commissioner, Yukon Film and Sound Commission**
- **Grant Simpson, Program Manager, MusicYukon**
- **Mark Smith, Executive Director, MusicYukon**
- **Heinz TerVoert, Senior Business Development Analyst, Department of Economic Development, Yukon Government**

Scope and definition of industry

It was agreed by study stakeholders that the study would collect industry data for the year 2005 (January 1 to December 31, 2005), 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 Yukon's music industry was an essential first step in this study, as it informed and confirmed research parameters. MusicYukon and the steering committee played a crucial role in this step, in close consultation with **kisquared** and Paul Kishchuk of **Vector Research**. For the purpose of measuring and analyzing economic impact, the Yukon 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 MusicYukon and the steering committee. As a result, industry actors who did not make or spend any money related to their music activities during the time period covered by the research are excluded from study findings. The process for determining membership in the Yukon music industry is summarized in Figure 45, below.

kisquared



Figure 45 HOW RESPONDENTS QUALIFIED FOR SURVEY – CRITERIA

Artist		Service provider
Solo	Group	
<p>Received personal revenue or government grants in 2005 from:</p> <p>Writing or performing music, or from royalties for music that s/he personally wrote or performed, either live or recorded; OR</p> <p>Had expenses related to personal music career in Yukon in 2005; AND</p> <p>Is Yukon resident (lives in Yukon and has a Yukon health card).</p>	<p>Belongs to a group that received revenue in 2005 from:</p> <p>Writing or performing music, or from royalties for music anyone in the group had written or performed, either live or recorded; OR</p> <p>Had expenses related to the group's activities; AND</p> <p>At least half of group's members live in Yukon.</p>	<p>Received revenue from, OR incurred expenditures for, a music industry related activity in 2005, such as:</p> <p>Managing, booking, or promoting the career of an individual artist or group;</p> <p>Buying talent for a live music venue or festival;</p> <p>Operating a recording studio;</p> <p>Arranging music for, producing, engineering, designing graphics for, manufacturing, or distributing a sound recording;</p> <p>Publishing or licensing music;</p> <p>Manufacturing, selling, servicing, or repairing musical instruments or accessories;</p> <p>Teaching music;</p> <p>Technical services (e.g., doing sound or lighting for live music performances)</p> <p>Professional services (e.g., legal or accounting services) to musicians, OR</p> <p>Had music industry related expenses in 2005.</p>

- 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, the steering committee and **kisquared**'s decision to proceed by excluding retail music outlets.

Sample development

kisquared, in partnership with Paul Kishchuk of **Vector Research**, 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 MusicYukon, steering committee members, and other stakeholders. Important sources used before fielding began include the following:

- MusicYukon membership list
- 2005 MusicYukon Discography
- Yukon Music Teachers list
- Local music festival programs and music festival websites (Alsek Music Festival, Dawson City Music Festival, Atlin Arts and Music Festival, Frostbite Music Festival)
- Arts in the Park 2006 summer program listing
- Yukon Department of Economic Development Online Business Directory
- 2006-2007 Northwestel Northern British Columbia and Yukon Directory
- Media notices of upcoming performances
- Artists and service providers identified at artist and industry consultation sessions
- Personal communications with Heather Loewen (artist)
- Personal communications with David Prodan (Frostbite Music Festival)
- www.myspace.com
- Other Internet-based resources and research tools

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 MusicYukon project personnel. Sub-categories of service provider 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 2005 Yukon music industry, using the definition under *Scope and definition of industry* above, consists of 292 solo artists, groups, and service providers. For a breakdown of the industry population by artists and service providers, see *Music industry activity* under the *Yukon 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 the MARIA study as a starting point.
- Prior to the scheduled industry consultation sessions, **kisquared** submitted a draft questionnaire to the steering committee (in electronic format) for review. The steering committee’s feedback on this draft questionnaire was incorporated into the questionnaire supplied for the industry consultations.
- Two 90-minute industry consultation sessions were held at MusicYukon offices with artists and service providers. Prior confirmation was received from 14 artists and 15 service providers, with two additional participants attending each session. Representatives from both sectors 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 session consultations were held via email and telephone between **kisquared** and members of the steering committee to further refine the questionnaire based on the feedback received from artists and service providers.
- MusicYukon 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 MusicYukon 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 8 and was completed on July 28, 2006.

kisquared



Data collection

kisquared collected 184 complete surveys, comprising 81 solo artists (of an estimated population of 123), 34 group artists (of an estimated population of 57), and 69 service providers (of an estimated population of 112) from the music industry sample developed for the study; this far exceeds initial expectations of 125 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 population estimates, is $\pm 2.67\%$ at the 95% confidence level. When broken down by music industry role, the margins of error are $\pm 3.30\%$ for artists and $\pm 4.53\%$ 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 (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, Yukon Input-Output multipliers, and other data, where appropriate.

Economic impact analysis – method and rationale

The following summarizes the methodology used for the economic impact portion of this study. The Yukon Department of Economic Development's 2002 Preliminary Yukon IO Multipliers were 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 Statistics Canada's *The Input Structure of the Canadian Economy, 2001-2002* and *A Guide to Deflating the Input-Output Accounts: Sources and Methods, 2001*, the Yukon Department of Economic Development's *Yukon Economic Update* (September 2006), and comparative guides such as the Northwest Territories Bureau of Statistics' *NWT Input-Output Model: An Overview* (June 2006), and Manitoba Bureau of Statistics' *Manitoba Economic Multipliers, 2004*.

The survey instrument for the study gathered very detailed expenditure information from respondents, including the proportion of expenditures spent in Yukon (only Yukon-based expenditures can be used to estimate the economic impact on the Yukon economy). Through industry consultation sessions, it was found that respondents were best able to provide such expenditure data if prompted to report how much they spent in each category during the 2005 taxation year.

Data provided by respondents was in the form of their 2005 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 two challenges.

The first challenge was that data that was collected in commodity-based categories had to be recoded 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 the at the "factory gate" sales price, before indirect taxes on the product, or retail, wholesale, and transportation margins are factored in. In contrast, commodity-based data of the sort that was collected is based on 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, 2001-2002*, which allowed industry expenditures to be reduced to producer price estimates.

The use of industry intensity ratios also requires considerable caution to be exercised by the researcher so that double counting of industry impacts is avoided. For example, the expenditures of one Yukon music industry establishment may go directly to another Yukon music industry establishment. Counting the expenditures of both establishments would be to double-count the impact, thereby overstating the combined economic impact for the Yukon. To address this issue, all expenditures cited by Yukon music industry establishments that were identified as (1) staying in the Yukon, and (2) being used to purchase a music industry-related commodity, and (3) for which revenue figures cited by other Yukon 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 \$4.4 million, rather than at \$2.8 million, had such double counting been included.

Economic impact was estimated using Yukon Preliminary Input-Output Multipliers (industry intensity ratios) for 2002 at the worksheet level of aggregation. These multipliers were provided by the Yukon Department of Economic Development and produced by Statistics Canada as part of its Input-Output Tables for 2002. This involved matching each category of the data collected (now in industry-based categories) to one of 302 Yukon 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 roles in the industry 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 (excludes subsidies and indirect taxes on products);
- Government net revenues (the net of indirect taxes minus subsidies);
- Yukon 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);
- Employment (in-person years).

It should be noted that this study provides no estimate of the closed (type II) impacts of the Yukon music industry, that is to say the additional economic impact resulting from consumer spending in the economy. Due to widespread improper misuse of such multipliers, Statistics Canada no longer provides such data.

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 \$1 million 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 2002. Changes in the Yukon, 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 and not substitutes. For example, it is assumed that increased demand for one input will lead only to increased demand for other inputs. As the Yukon Department of Economic Development notes, “the I-O model does not consider price-adjusting behaviour or substitution effects.”
- 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 2005 expenditures in Yukon by the music industry. As such, the data discussed in this report represents a snapshot of the music industry in 2005 and may not be representative of the Yukon 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 Yukon 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.

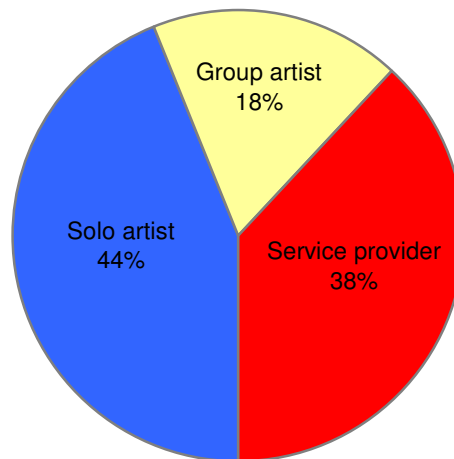
Appendix C: Respondent profile

The following are quantitative findings regarding the respondents who participated in the 2006 Economic Impact Assessment of the Yukon 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 46 below shows the proportion of artist respondents versus service provider respondents in this study. Solo artists form the largest proportion of survey respondents (44%), service providers constitute two-fifths of survey respondents (38%), and group artists represent 18%.

Figure 46 *RESPONDENT INDUSTRY ROLE*



Region

Figure 47 below shows the regional breakdown of respondents. By far the most are from the City of Whitehorse (91%). One out of twelve lives elsewhere in the Yukon (8%).

Figure 47 RESPONDENTS BY REGION

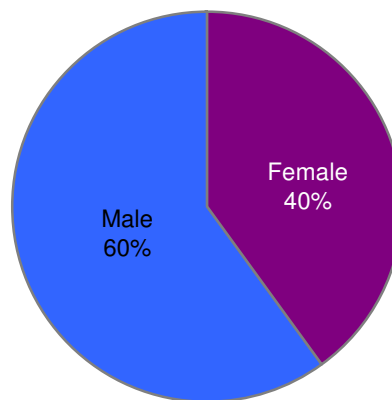
	Percent
In Whitehorse	91%
Outside Whitehorse	8%
Outside the Yukon	1%
Total	100%

Gender

Figure 48 below illustrates the breakdown of respondents by gender. Three-fifths (60%) of survey respondents overall are male and two-fifths (40%) are female.

However, when analyzed by industry role, the gender breakdown differs considerably: among artists, the proportions are 70% males and 30% females, whereas among service providers, the ratio is 44% males to 57% females. Note that this finding applies to respondents only, and may not hold true for the industry as a whole.

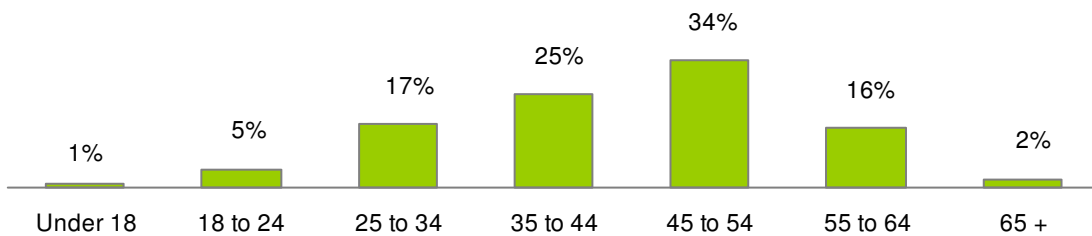
Figure 48 RESPONDENT GENDER



Age

Over one-half of all respondents are aged 35 to 44 years or 45 to 54 years (25% and 34% respectively.) The average age is 44 years. Figure 49 below shows respondent age distribution.

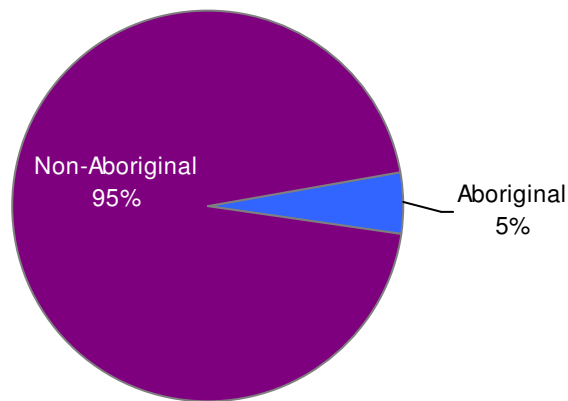
Figure 49 RESPONDENT AGE



Aboriginal status

As shown in Figure 50 below, based on self-definition, 5% of respondents are of Aboriginal ancestry.

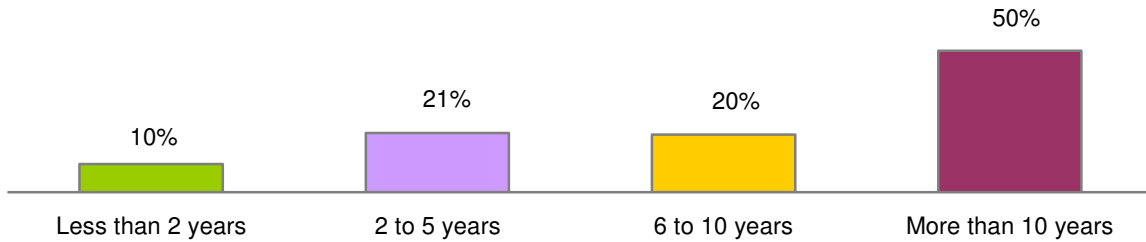
Figure 50 RESPONDENT ABORIGINAL STATUS



Years in music industry

Figure 51 below shows the proportions of survey respondents based on their number of years in the music industry. One-half (50%) have been in the industry for more than ten years. One-fifth (21%) has been involved for 2 to 5 years, and a similar fraction (20%) have been in the industry for 6 to 10 years.

Figure 51 RESPONDENTS' NUMBER OF YEARS IN THE INDUSTRY

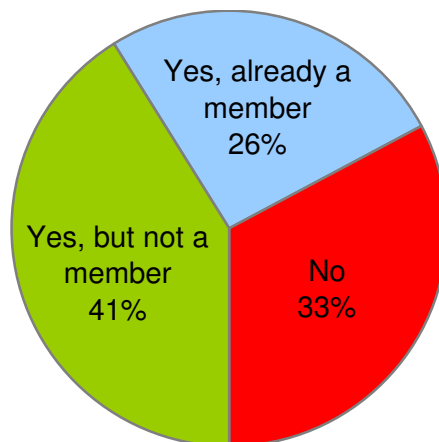


Note: The total percentage does not equal 100% due to rounding.

Respondent interest in survey findings

This study collected data on whether respondents wanted to be added to MusicYukon's email list so that they could receive the survey results. Figure 52 below shows the high level of interest in survey findings: 67% would like to receive the survey results by way of MusicYukon's email list (26% being MusicYukon members already), whereas just one-third (33%) do not wish to be so added.

Figure 52 RESPONDENTS WILLING TO GO ON EMAIL LIST TO RECEIVE STUDY RESULTS



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Appendix D: Questionnaire

N =184

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

SECTOR: Solo artist1 Group2 Service provider3

SOLO ARTIST NAME: _____

GROUP ARTIST NAME: _____

SERVICE PROVIDER NAME: _____

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

May I please speak to _____?

ANSWERING MACHINE MESSAGE: Hello, I'm calling on behalf of kisquared. We are working with MusicYukon and Yukon Economic Development to conduct a music industry impact survey. Your name was given to us as an active participant in the Yukon 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 MusicYukon. This is not a sales call. All those that agree to participate are eligible to win a round-trip airfare for two to Vancouver, Calgary or Edmonton with *Air North, the Yukon's Airline*. I look forward to speaking with you soon. And again, the number is 1-888-950-8002. Thanks!

Hello, my name is _____ and I'm calling on behalf of kisquared. We are working with MusicYukon and Yukon Economic Development to conduct a music industry impact survey. Have you heard about this survey? We would like to discuss the Yukon'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 INFO.**

MENTION CONTEST DRAW IF NECESSARY. 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 personal 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 MusicYukon will only discuss the results of the survey as a whole.

kisquared



GROUP QUALIFICATION

Q1 Do you belong to a music *group* or band that received any revenue in the calendar year 2005 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 OR BELONG TO GROUP, ASK:** And that group's name is?

- Yes (**RECORD GROUP NAME BELOW**)....1 **GO TO Q3**
- No, not in group2 **GO TO Q6**
- Belong to group, but no revenue
(**RECORD GROUP NAME BELOW**).....3

Group name _____

Q2 What about expenses related to your group's activities? Did your group have any music industry-related expenses in the Yukon in 2005?

- Yes, group had expenses.....1
- No, no expenses2 **GO TO Q6**

Q3 Do at least half the members of your group or band live in the Yukon?

- Yes1
- No.....2 **GO TO Q6**

Q4 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?

- Yes1 **Group**
- No (**FILL OUT INFO BELOW**).....2
- Don't know / refused9

Group rep. _____

Phone (____ __ __) _____ - _____

Q5 And how many members play in your group including yourself?

____ **ENTER 99 FOR DK/REF**

ARTIST QUALIFICATION

Q6 Did *you* receive any personal revenue or government grants within the past year, that is the calendar year 2005, 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?

- Yes1 **GO TO Q8**
- No.....2

Q7 What about expenses related to your personal music career? Did you spend any money on your personal music career here in the Yukon in 2005?

Yes1
No.....2 **GO TO Q9**

Q8 Do you consider yourself a Yukon resident, that is, you live in Yukon and have a Yukon health card?

Yes1 **Solo artist**
No.....2

SERVICE PROVIDER QUALIFICATION

Q9 Have you received any revenue in the calendar year 2005 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, 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 like doing sound or lighting for live music performances? **PAUSE** Or professional services such as legal or accounting services to musicians? **THEN ASK:** Did you have any music industry related *expenses* in 2005?

No revenue, but yes I had expenses1
Yes I had revenue, but no expenses2
Had both revenue and expenses3
No revenue, and no expenses either.....4 **I CODE**

} **Service provider**

IF ‘YES’ IS NOT CIRCLED IN Q4, Q8 OR Q9, THEN RESPONDENT DOES NOT COMPLETE THE REST OF THE SURVEY. PLEASE RESPOND WITH...These are the all the questions that I needed to ask. We really appreciate your time in helping us complete a music industry impact study for MusicYukon.

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

EXPENSES

Since this is an economic impact study, I'd like to start by asking you some questions concerning your *expenses* related to the music industry for the year 2005. These are grouped as costs for equipment, travel, professional services, office, and sites.

Q10 Could you please tell me whether you spent anything 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?

	Total spent
Musical instruments and accessories?01	\$ __ __, __ __ __, __ __ __
Specialized hardware and software, including interfaces, controllers, etc.?02	\$ __ __, __ __ __, __ __ __
DJ equipment and accessories, such as CD or MP3 players, turntables, effects, etc.? ...03	\$ __ __, __ __ __, __ __ __
Recording equipment and accessories, including recorders, mixers, etc.?04	\$ __ __, __ __ __, __ __ __
Live sound reinforcement and P.A. or lighting equipment and accessories?05	\$ __ __, __ __ __, __ __ __
Tents, staging, halls, building or other venue rentals?.....06	\$ __ __, __ __ __, __ __ __
Photographic equipment?.....07	\$ __ __, __ __ __, __ __ __
CD duplication machinery?08	\$ __ __, __ __ __, __ __ __
Equipment and musical instrument repair and maintenance?09	\$ __ __, __ __ __, __ __ __
None.....77	GO TO Q12
Don't know88	GO TO Q12
Refused99	GO TO Q12

Q11 Of all these costs, approximately how much was spent in the Yukon or with a Yukon supplier? **ENTER 9 SERIES FOR DK/R.**

\$ __ __, __ __ __, __ __ __

Q12 And could you please tell me whether you 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?

	Total spent
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	\$ __ __, __ __ __, __ __ __
None..... 77	GO TO Q14
Don't know 88	GO TO Q14
Refused 99	GO TO Q14

Q13 And of all these travel and transportation costs, approximately how much was spent in the Yukon or with a Yukon supplier? **ENTER 9 SERIES FOR DK/REF**

\$ __ __, __ __ __, __ __ __

Q14 And could you please tell me whether you spent anything 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 \$ __ __, __ __ __, __ __ __
- 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 or production,
incl. equipment purchases for resale?09 \$ __ __, __ __ __, __ __ __
- Vocal or instrumental coaching and
other professional development fees?.....10 \$ __ __, __ __ __, __ __ __
- Legal and accounting services?11 \$ __ __, __ __ __, __ __ __
- Sheet music and music books?12 \$ __ __, __ __ __, __ __ __
- Union or other trade association dues?13 \$ __ __, __ __ __, __ __ __
- Other outsourced or contract professional
services from anyone who is not a
full-time employee of your company?14 \$ __ __, __ __ __, __ __ __
- Non-travel related accommodation and
hospitality?15 \$ __ __, __ __ __, __ __ __
- None.....77 **GO TO Q16**
- Don't know88 **GO TO Q16**
- Refused99 **GO TO Q16**

Q15 Of all these professional service costs, approximately how much was spent in the Yukon or with a Yukon supplier? **ENTER 9 SERIES FOR DK/REF**

\$ __ __, __ __ __, __ __ __

Q16 And could you please tell me whether you 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, photocopying, telephone, fax, courier, long distance, Internet, website hosting, etc.?.....	03	\$ ____, ____, ____
Rent, including utilities?	04	\$ ____, ____, ____
Tapes, CDs, DVDs, records and video purchases?	05	\$ ____, ____, ____
Marketing costs, like press kits, photos, application fees?.....	06	\$ ____, ____, ____
Duty, brokerage and import fees?.....	07	\$ ____, ____, ____
All insurance costs?	08	\$ ____, ____, ____
Artist label CD purchases?.....	09	\$ ____, ____, ____
Bank and other financial service fees including loan or credit card interest?.....	10	\$ ____, ____, ____
Funding and advance recoupment?.....	11	\$ ____, ____, ____
Artist fees?	12	\$ ____, ____, ____
Licensing fees?.....	13	\$ ____, ____, ____
None.....	77	GO TO Q18
Don't know	88	GO TO Q18
Refused	99	GO TO Q18

Q17 Of all these office and business costs, approximately how much was spent in the Yukon or with a Yukon supplier? **ENTER 9 SERIES FOR DK/R.**

\$ ____, ____, ____

Q18 And could you please tell me whether you spent anything on other *site-related* costs related to the music industry, such as... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And how much did you spend on that?

- Talent, technical and producer fees?.....01 \$ ____, ____, ____
- Air, hotel and accommodation fees for live musical performances?.....02 \$ ____, ____, ____
- Marketing, advertising and promotion specifically related to live musical performances?03 \$ ____, ____, ____
- Backline, sound, lights and other production expenses *excluding* labour costs?.....04 \$ ____, ____, ____
- On-site security costs?05 \$ ____, ____, ____
- SOCAN?06 \$ ____, ____, ____
- None.....77 **GO TO Q20**
- Don't know88 **GO TO Q20**
- Refused99 **GO TO Q20**

Q19 Of these site-related costs, approximately how much was spent in the Yukon or with a Yukon supplier? **ENTER 9 SERIES FOR DK/R.**

\$ ____, ____, ____

Q20 So far you have told me that you have spent _____ in 2005 in connection with the music industry. Are there any expenses that we've missed?

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

Q21 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 OR IF NOT APPLICABLE. FTE IS CALCULATED BASED ON 30 HOURS PER WEEK.**

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

REVENUE

I'm going to ask you questions now about any money *your group* made in 2005 making music, then about money from managing or providing services for other musicians, then about money from grants, and then about loans or credit.

Q22 Did [you / your group] receive any revenue in 2005 from... **READ LIST AND CIRCLE ALL THAT APPLY. THEN, ASK:** And how much gross revenue did your group receive from that in 2005? **[ONLY ASKED TO ARTISTS – SOLO AND GROUPS; RESPONSE 11 ONLY ASKED TO SOLO ARTISTS]**

Live performance fees?.....01	\$	__	,	__	,	__	__
Selling promotional merchandise?.....02	\$	__	,	__	,	__	__
Selling or distributing CDs, tapes, 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	\$	__	,	__	,	__	__
Studio session fees?09	\$	__	,	__	,	__	__
Synch (“sink”) fees and licensing fees?10	\$	__	,	__	,	__	__
A per diem or salary from your record label or group?11	\$	__	,	__	,	__	__
None.....77							
Don't know88							
Refused99							

Q23 Did [you / your group / your business] receive any revenue in 2005 from... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And what was the gross revenue [you / your group / your business] received from that in 2005? **[RESPONSES 13 THROUGH TO 18 ONLY ASKED TO SERVICE PROVIDERS]**

Managing, booking, or promoting an artist other than yourself?.....01	\$	___	,	___	,	___	___
Commissions on promotional merchandise for another artist?.....02	\$	___	,	___	,	___	___
Commissions for providing talent for a live music venue or festival?03	\$	___	,	___	,	___	___
Technical services like doing sound or lighting for live music performances?04	\$	___	,	___	,	___	___
Arranging other artists' music?.....05	\$	___	,	___	,	___	___
Renting out rehearsal or studio space?.....06	\$	___	,	___	,	___	___
Operating a sound recording studio?07	\$	___	,	___	,	___	___
Engineering, producing, manufacturing or distributing another artist's sound recording?.....08	\$	___	,	___	,	___	___
Publishing or licensing another artist's music?09	\$	___	,	___	,	___	___
Manufacturing, renting, selling, repairing or servicing music instruments or accessories?.....10	\$	___	,	___	,	___	___
Teaching music?11	\$	___	,	___	,	___	___
Professional services, like website design, grant application assistance, legal or accounting services?12	\$	___	,	___	,	___	___
Ticket sales for live music?.....13	\$	___	,	___	,	___	___
Rental income from your facility?14	\$	___	,	___	,	___	___
Parking, food, refreshment and other income from live music performances?15	\$	___	,	___	,	___	___
Sponsorship or advertising revenue for live music performances?16	\$	___	,	___	,	___	___
Agency fees?.....17	\$	___	,	___	,	___	___
Building improvement fees?.....18	\$	___	,	___	,	___	___
None.....77							
Don't know88							
Refused99							

Q24 Did [you / your group / your business] receive any *funding* in 2005 from... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And what was the total amount of funding in 2005?

- FACTOR? (“factor”)01 \$ ____, ____, ____
- Musicaction? (“mew-zeek-ax-ee-on”).....02 \$ ____, ____, ____
- VideoFACT?.....03 \$ ____, ____, ____
- PromoFACT?.....04 \$ ____, ____, ____
- BravoFACT?.....05 \$ ____, ____, ____
- Canada Council for the Arts?.....06 \$ ____, ____, ____
- Arts Presentation Canada?07 \$ ____, ____, ____
- Culture Quest?08 \$ ____, ____, ____
- Enterprise Trade Fund?.....21 \$ ____, ____, ____
- Cultural Industries Training Fund?.....09 \$ ____, ____, ____
- Community Development Fund?.....10 \$ ____, ____, ____
- Canadian Country Music Association?.....11 \$ ____, ____, ____
- Yukon Arts Funding Program?.....12 \$ ____, ____, ____
- The Arts Fund?13 \$ ____, ____, ____
- Yukon Investment Fund for Youth?14 \$ ____, ____, ____
- Yukon Directorate?.....15 \$ ____, ____, ____
- Yukon Film and Sound Commission?16 \$ ____, ____, ____
- Yukon Lotteries’ Advanced Artist Award?17 \$ ____, ____, ____
- Corporations or corporate foundations?.....18 \$ ____, ____, ____
- Any municipal government?.....19 \$ ____, ____, ____
- Any other agency?
(specify: _____) 20 \$ ____, ____, ____
- None.....77
- Don’t know88
- Refused99

Q25 Not including any funding you might have received, did [you / your group / your business] receive any music industry related *loans or credit* in 2005 from ... **READ LIST AND CIRCLE ALL THAT APPLY. THEN ASK:** And how much did [you / your group / your business] receive from that in 2005?
[RESPONSE 5 ONLY ASKED TO ARTISTS – SOLO AND GROUPS]

- A financial institution?.....1 \$ ____, ____, ____
- A FACTOR loan?2 \$ ____, ____, ____
- Money from friends, family or other private sources?.....3 \$ ____, ____, ____
- A business other than financial institution? 4 \$ ____, ____, ____
- A scholarship or bursary?5 \$ ____, ____, ____
- No loans or credit from any source.....7
- Don’t know8
- Refused9

- Q26 So far you have told me that in 2005 [you / your group / your business] received \$_____ from the music industry. Is there any revenue that we've missed?
- Yes (\$____, _____ from _____)....1
 Yes (\$____, _____ from _____)....2
 No.....3

RESPONDENT INFORMATION

- Q27 When considering your overall involvement in the Yukon Music Industry, what *one* musical genre or aspect of the industry would you say you are *most* involved in?
- _____

- Q28 Do you define yourself as an Aboriginal person, that is someone of Inuit, First Nations or Métis ancestry?
- Yes1
 No.....2
 Don't know / refused9

- Q29 How long have you personally been an active participant in the Yukon music industry?
- Less than 2 years.....1
 Two to 5 years.....2
 6 to 10 years.....3
 More than 10 years.....4

- Q30 In what year were you born? **ENTER 99 FOR DK/REFUSED.**

1 9 _ _

- Q31 What are the first three letters of your postal code? **YUKON POSTAL CODES BEGIN WITH "Y". 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		

Q32 RECORD GENDER OF RESPONDENT – DO NOT ASK

Male1
Female.....2

Q33 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 (**SEE Q5 IN QUALIFICATION SECTION**). **[Q33 ONLY ASKED TO GROUPS]**

Name _____ Ph: _____ - _____
Name _____ Ph: _____ - _____
Name _____ Ph: _____ - _____

Q34 Since one of the goals of this study is to measure the total size of the Yukon 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? **CHECK DATABASE AND ENTER ANY CONTACTS NOT ALREADY LISTED.**

Name _____ Ph: _____ - _____
Name _____ Ph: _____ - _____
Name _____ Ph: _____ - _____

Q35 Would you like to be added to MusicYukon’s email list to receive the survey results? **IF YES, SAY “and your e-mail address is?”**

Yes, already member (**CHECK DETAILS**).....1
Yes, not a member (**CHECK DETAILS AND ADD IN E-MAIL ADDRESS OR SNAIL MAIL TO DATABASE**)2
No.....3

E-mail: _____ @ _____

Q36 Do you wish to be entered into the contest for a round-trip airfare for two to Vancouver, Calgary or Edmonton with *Air North, the Yukon’s Airline?*

Yes1
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.