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The Jazz Music Market in Singapore

Prepared by Anne Malépart and Jiazhen Gu

January 2005

The Department of Canadian Heritage, Trade Routes program, commissioned this Report. The opinions expressed are those of the author and do not necessarily reflect the view of the Department of Canadian Heritage.

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Canada

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EXECUTIVE SUMMARY

Singapore is a small island country with a privileged central geographical location. Through the efforts of its people and government, Singapore has become a regional service center, and a major trading force in the South East Asia region. The Singapore government has been playing an important role in the development and promotion of the local arts and music scene in a bid to attract more international acts. The local music industry has directly benefited from this effort as seen by the growth in music sales despite the regional economic downturn.

Despite having four official languages, mainstream English music dominates the market. Over the years, jazz has become an increasingly popular musical genre with Singaporeans. This trend can be attributed to the marketing successes of international jazz artists like Diana Krall, Norah Jones, Michael Bublé, etc.

The Singapore jazz music market has huge potential for potential Canadian artists given that a number of jazz festivals, jazz series and venues featuring jazz are organized all year round. In addition, local government agencies and private sponsors work constantly to include Singapore in the itineraries of international and regional jazz artists in an effort to support the exposure of jazz in the country. Other advantages of performing in Singapore include the related promotional opportunities available by local broadcast and print media and probably Asia's strongest copyright law and enforcement mechanism.

Deciding to perform in Singapore implies that certain market entry considerations are taken into account. Entry visas, performance licenses, projected costs and earnings (i.e. possible ticket prices) and taxation issues are among the important export checklist items to deal with.

The important thing is that due diligence has to be done in the areas of research, planning and budgeting for the tour or trip. The High Commission of Canada in Singapore can help independent artists by liaising on their behalf with the local music industry.

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MARKET OVERVIEW

Singapore is a multi-ethnic cosmopolitan city that enjoys a diverse and vibrant cultural scene. It is a city-state composed of one large island and 54 islets, and has a total area of 650 sq km. With a population of over four million people, it is a country of remarkable social organization and unique political administration. In spite of the lack of natural resources, the country has emerged as a dramatic economic success story in the last four decades. A privileged central geographical location, coupled with a strong trading history, and sound governmental policies have transformed and established Singapore as a regional service center, and a major trading force in the South East Asia region.

In recent years, the Singapore government has become more proactively involved in the development of the local arts and music scene as a means to promote the country as a cultural hub. In a bid to attract more international acts to Singapore, the government has loosened much of its previously rigid regulations regarding media and entertainment. It also spearheaded the development of a national performing arts center, Esplanade, *Theaters on the Bay*, which houses world-class performance spaces that are supported by a comprehensive range of professional support facilities and services. Many local and international jazz artistes such as ChromaZone and Dianne Reeves have performed within its walls since its opening.

The local music industry has directly benefited from this effort. As music sales across Asia fell by 10% in 2002, largely because of continuing economic difficulties and both physical and Internet piracy, this Southeast Asian country has been the exception, seeing a growth in both its regional and international repertoire. Singapore bucked the trend, seeing a rise of 5.7% in value and 3.8% in units, mainly driven by the success of regional law enforcement actions to fight physical and Internet piracy and copyright infringement in the country. (Please refer to Appendix 1 for statistics on the music sector in Singapore.)

In spite of the fact that the country has four different widely spoken languages, mainstream English music, predominantly from the USA and Europe, dominate the market. Major record companies such as *Universal*, *Sony* and *Warner* have head offices in this Garden City. Pop, rock, urban and smooth jazz artists like Madonna, Celine Dion, Evanescence, Sum 41, Diana Krall, Michael Bublé and Avril Lavigne, to name a few, rank the music charts. Local artists performing in English, Chinese or Malay are also striving to find their share of the sales revenues and international recognition with the support of a limited number of independent labels like *EQ Music* and *Music Street*.

The jazz genre has gradually evolved from an intellectual movement to an increasingly popular musical genre with Singaporeans over the years. The inspiring work of national jazz figures such as O'Donald Levy and Jeremy Montiero, combined with the huge success of international vocalists Diana Krall and Norah Jones have contributed to the increasing popularity of jazz in the country. Jacinta Abisheganadan, a native jazz diva, emerged as an international recording artist in 1999 following the footsteps of Krall and Jones. Her album "*Here's to Ben*", recorded in 1998 opened the doors to an ascending career. Jacinta has since recorded three albums, made it into the top 50 Billboard jazz album chart, and has been featured in *Jazz Time*, the international jazz income

magazine. Groove Note Records, the only local independent jazz label, has been instrumental in Jacinta's musical success.

KEY FACTORS SHAPING MARKET GROWTH

Singapore has risen to become a very promising music market in the Pacific Rim region despite its size and consequently as a potential market for Canadian music artists due to several reasons.

Singapore's ideal geographical location allows Singapore to serve as a transit base to its neighboring Asian countries, Japan or Australia for touring Canadian artists. Its multi-ethnic background has resulted in the country being open and receptive to new musical influences. In general, Singaporeans enjoy dining out, attending musical concerts, festivals, theatrical performances and movies on a regular basis. Furthermore, due to its lack of natural resources, Singapore has been forced to develop its service sector (including the arts and entertainment), in which the music industry plays an important role.

Recently, the government has been placing much emphasis on the local arts and music scene. Its government mandate is to support and promote arts related activities to provide entertainment to everyone. Hence, there are a number of festivals, jazz series and venues featuring jazz organized all year round. Working closely together, presenters, producers, promoters, event planners, government agencies and private sponsors try to arrange so as to include Singapore in the itineraries of international and regional jazz artists. Therefore, audiences and the market for jazz music will continue to grow as its government and private sector continue to support the exposure of jazz in the country.

The results of these efforts can be seen from the increase of music sales despite the regional economic downturn. In fact, Singapore was the only country in Asia that experienced global music sales increase in 2002. Finally, despite the distance, the higher value of the Canadian dollar over the local currency and several other currencies of the surrounding region benefits artists touring in the country

OPPORTUNITIES

Key Events and Festivals

Supporting and promoting the increasing growth of jazz audiences in Singapore are annual music events such as the *WOMAD*, the International Jazz Festivals, *Chijazz*, and the *CHIJMES* Jazz Series from May to September. These events stage a wide variety of local and foreign jazz artists, from traditional to fusion, *jazz-house* to *funk* and smooth jazz.

For example, *Chijazz* is the most-anticipated Jazz Festival in Singapore that takes place at *CHIJMES* in November, on Sundays from 5 to 10 pm. Admission is free. In 2004, the

event's line-up celebrated all things jazz. *Louis Soliano & Friends*, *ChromaZone*, *Wiierd* and the *Singapore Stompers*, were some of the artists who performed a selection of jazz classics, *motown*, fusion and *blues*.

CHIJMES is the organization behind the first international *Chijazz* festival. It has staged several other jazz series and festivals since then. The *Chijazz* festival that is held annually during the months of October and November is one of the many international events organized by *CHIJMES*, and is perhaps one of the few local festivals featuring international jazz artists. The participation of private sponsors is key in the development of these festivals and live presentations, and the successes of these events help to introduce and promote new avenues of influences such as Jazz Concert in the Park.

Chijazz attracts a wide range of audiences from students, to young adults, to professionals. It's a casual event, where audience can eat and interact among themselves. Canadian jazz artists who are interested in performing in *Chijazz* should contact Ms. Sandra Goh, Senior Manager Arts & Entertainment of *Cadwell Arts Pte Ltd*. *Cadwell Entertainment* will typically work out the sponsorship and promotional aspects of the performance(s). Artists can come into Singapore on a social visit pass. The organizers will apply for entertainment license for the artists (Please refer to the Market Logistics section of this report for further information on mandatory requirements).

Jazz Events

Event / Description	Organizer
CHIJAZZ Annual Jazz Festival Held around September/October	CHIJMES shops Managed by Cadwell Arts Pte Ltd Ms Sandra Goh Tel: (65) 6332 6275 www.cadwellarts.com.sg
CHIJMES Jazz, Blues & Latin Series Held monthly on Sunday evenings	The Esplanade Co. Ltd 1 Esplanade Drive Singapore 038981 Mr Nathan Programming Manager Tel: (65) 6828 8251 Fax: (65) 6337 3633 www.esplanade.com
MOSAIC Music Festival 10-day kaleidoscope of music performed by acclaimed artists headlining today's jazz and world music scene in March	National Arts Council Mr Tan Boon Hui Tel 65 6837 9523 Fax : (65) 6837 3017 www.nca.gov.sg
Singapore Arts Festival Around May to June	From the information available, the event was sponsored by Singapore Airlines. It remains unclear if another event of this nature will be held in Singapore again. www.singaporejazzfestival.com
Jazz Concert in the Park Around September	WOMAD Projects Singapore Pte Ltd 35A Duxton Road, Singapore 089499 Sarah Martin
Singapore International Jazz Festival Some of the world's top names in jazz descended in Singapore in May 2001 for a world-class 4 ticketed jazz event, and included jam sessions and free entertainment.	
WOMAD Singapore Held usually in August	

Regional Operations Manager
 Tel: (65) 6220 2676
 Fax: (65) 6220 2127
www.womadsingapore.com

Live Entertainment Venues

Apart from all the jazz and music events, there are also a number of hotels and pubs in the country that feature this Afro-American rooted genre all year round. However, note that because jazz is such a young market here, many jazz pubs do not just dedicate themselves to playing pure jazz music. Rather, they tend to interchange between variations of jazz such as blues or soul, and even playing mainstream pop music covers.

Hotels Bars and Pubs offering Jazz Performances

- | | |
|---|---|
| <ul style="list-style-type: none"> • Aubreys Pte Ltd. • Balaclava • BAR • Bar & Billiard Room. • Brix • Chijmes • Harry's Bar • Jazz SouthBridge. | <ul style="list-style-type: none"> • Mag's Wine Bar and Bistro • No 5 Emerald Hill. • Robertson Walk Jazz • Round Midnight • The Bar @ Regent • The Saxophone Bar • Victoria Bar • Wala Wala Cafe Bar • Intercontinental Jazz Lounge |
|---|---|

Broadcasting and Print Media

Another way for foreign jazz artistes to gain exposure among the local audience would be through the broadcast and print media. Due to the multi-ethnic and polyglot nature of Singapore society, over twenty radio-station and television channels broadcast a diversity of programs catering to all age groups in the four widely spoken languages: Tamil, Malay, Mandarin and English.

a) FM Radio Stations

There are 3 main radio operators in Singapore: *Mediacorp*, *SAFRA* and *Unionworks*. Together they manage a total of 19 FM, 8 shortwave (HF), and 2 digital (DAB) broadcasting stations between them, of which, the 3 most popular English stations are: *Class 95.0FM*, *Power 98.0FM*, and *Perfect Ten 98.7FM*.

The radio stations in Singapore that have jazz programs and music in their regular broadcast schedules are: *Gold 90.5*, *Class 95*, and *Lush 99.5*. From time to time, the other radio stations also feature special programs that introduce various music genres and artistes, including jazz musicians. Such programs prepared by the hosting DJs are very effective in creating awareness and interest about a previously unknown jazz album.

A Radio Directory of all the radio stations in Singapore can be found at the following link: www.asiawaves.net.

b) Television Stations

The television sector in Singapore is monopolized by *MediaCorp TV Holdings* in the provision of free-to air channels (www.mediacorptv.com), and *Starhub Cable Vision* in the provision of cable television (www.starhub.com/cabletv). The television penetration rate in Singapore is very high, making it one of the most effective media to advertise in. However, it is also one of the most expensive. Furthermore, it is virtually impossible to secure spots on local programs that allow for live performances without a major label behind you.

As such, free-to-air television channels like *Arts Central* and *ChannelNewsAsia* play an important role in raising public interest in music, including jazz. These channels feature documentaries and have programs on music and famous musicians. *Arts Central* focuses on the vibrant global world of arts and culture. Its programming slate offers magazine programs, documentaries on a variety of topics, performances, art house movies, animation (for children and adults) and short films. Some of the past programs on jazz on Arts Central include “*Ella Fitzgerald: Something to Live For*”, “*An Evening of Jazz with Carol Kidd*”, “*Voices: Best of Keiko Lee*”, “*Diana Krall Live in Paris*”, etc.

c) Print Media

Singapore Press Holdings (SPH) publishes 13 newspapers and 63 magazine titles in the four main languages: English, Tamil, Mandarin and Malay. Of which, with a circulation of approximately 390,000 copies daily, *The Straits Times* is the most widely read English language newspaper in Singapore. Its *Lifestyle* section periodically features articles and exposes about music and various facets of the arts and cultural scene in Singapore. Other popular titles under SPH include *The Sunday Times*, the Sunday edition of *The Straits Times*, and *The New Paper*, Singapore’s only afternoon tabloid. Advertising rates on these papers vary depending on the size, color, location and day of the advertisement. For a comprehensive list of the publications under *Singapore Press Holdings*, visit their website at www.sph.com.sg

Other publications in Singapore include *Today*, a freely distributed paper by *MediaCorp Press Ltd*, and the *IS Magazine*, a weekly entertainment magazine distributed freely throughout Singapore in cafes and trendy outlets, are both good sources of information on what’s happening in the country on the cultural front and also offers good promotional opportunities for advertising as it is read by a large number of Singaporeans and the expatriate community in Singapore.

THE RECORDING INDUSTRY IN BRIEF

The local recording industry is surprisingly vibrant considering the size of the country. This is perhaps due to Singapore’s good reputation as a service center and its centralized location. There are a number of local and international recording, music and

copyrights protection organizations in Singapore. Listed below are some of the associations relevant to musicians.

The Recording Industry Association (Singapore)

RIAS is a non-profit trade association that represents both foreign and local record companies in Singapore, serving as the industry's voice both locally and internationally. It works closely with international and local agencies such as the Intellectual Property Office of Singapore (*IPOS*) and the International Federation of the Phonographic Industry (*IFPI*) in the fight against piracy.

RIAS aims to advance the interest of the Singapore music industry by maintaining and fostering trade ethics and fair business practices in the industry, promote and defend intellectual property rights, and generally conduct activities to promote the industry. Activities include maintaining of hits charts, compiling industry information such as sales figures, undertaking various public education projects to alert the public to the piracy problem and to educate them on the importance of respecting copyright.

Web link to the Recording Industry Association (Singapore): www.rias.org.sg

Composers And Authors Society Of Singapore Ltd

The Composers and Authors Society of Singapore Ltd (*COMPASS*) is a non-profit public company, which administers the full range of music copyrights on behalf of its members (composers, authors and music publishers). It promotes and safeguards the collective interests of its members, providing consultancy services to raise the profile of members (and their repertoire) at local and international levels.

Web link to the Composers And Authors Society Of Singapore Ltd:
www.compass.org.sg

Music Publishers (S) Ltd

Music Publishers (S) Ltd (*MPS*) is a non-profit making organization comprising twelve music publishing companies. It controls a large number of music copyrights in Singapore. Its principal activity is to promote, protect and generally watch over and preserve the interest of all music publishers and its members in all countries throughout the world.

Web link to the Music Publishers (S) Ltd: www.mps.org.sg

Others useful web links:

International Federation of the Phonographic Industry (IFPI): www.ifpi.org

Intellectual Property Office of Singapore (IPOS): www.ipos.gov.sg

MARKET ENTRY CONSIDERATIONS

Visas and Licensing

Foreign artists are allowed to enter Singapore on Social Visit Passes. The granting of social visit passes to visitors will be determined by the Immigration & Checkpoints Authority (*ICA*) officers at Singapore checkpoints customs clearance. Canadians do not require a visa to enter Singapore, but are advised to take note of the number of days of stay given in the social visit pass in order not to overstay. It is a punishable offence to overstay in Singapore beyond the number of days given.

All visitors on social visit passes are not permitted to engage in any form of paid employment or in any business, profession or occupation in Singapore. However, foreign artists can obtain a Public Performance license from the Public Entertainment Licensing Unit (Singapore Police Force), and an Arts Entertainment license from the Media Development Authority (*MDA*), in order to perform in Singapore. It is possible to apply for these licenses online.

Web links to the relevant government bodies:

- Immigration & Checkpoints Authority; www.ica.gov.sg
- Singapore Police Force; www.spf.gov.sg
- Media Development Authority; www.mda.gov.sg

Ticket Prices for Foreign Performances

(All ticket prices are quoted in SGD)

Ticket prices tend to be higher for foreign performances, with the most expensive tickets ranging around \$100, and the cheapest tickets ranging around \$40; depending on the artist performing and the performance venue. Performances by local music groups are rare in formal venues such as the Esplanade and the Victoria Theater, and the ticket prices are much lower, ranging from about \$60 to \$25. Big-ticket performances in the theaters are usually limited to only one or two night events at the most, whereas a typical hotel run for a relatively unknown artist can last up to 2 to 3 weeks.

Taxation

Fees paid to artists by private impresario or revenues from earned from tickets sales are subject to taxation. Singapore levies an entertainment tax of 5% on all tickets sold. Some organizations such as the *National Arts Council (NCA)* are exempted when they present performances. Indeed, artists coming under the banner of a government body such as NAC do not need any license and fees paid by the *NAC* are tax-free. Cultural events organized via embassies are not tax-exempt.

Relevant government body:

- Inland Revenue Authority of Singapore www.iras.gov.sg

Possible Challenges

Some of the challenges that independent jazz Canadian artists may face when trying to penetrate the Singapore music/jazz market include:

- 1 High cost of transportation from Canada to Singapore, and back. The key is therefore to include Singapore as part of an Asian Pacific tour rather than a standalone destination. This offsets costs.
- 2 If you plan on touring the region on your own, mailing promotion and publicity material from Canada to Singapore add to the expenses. Therefore, if a tour is planned ahead of time, sending material by sea would largely save on the overall marketing costs.
- 3 Independent artists lacking international recognition most often have to cover for their own accommodation.
- 4 High possibility of miscommunication, especially when relying only on phone conversations or Internet messages. This increases the degree of difficulty setting up a network in a far location
- 5 Musician fees and revenues from tickets sales are taxable in Singapore. Hence, proper research and preparation (application for the necessary paperwork) has to be done before coming to Singapore.
- 6 Gear rental like drums sets would need to be identified by the band when discussing with the local promoter and agent. (Find out the price or give rough quotation)

Final Considerations

Organizing and booking a tour in Singapore and/or the region on your own is certainly not an impossible task. The key for a successful tour 'solo' is to have done the homework first in terms of research, planning and budgeting.

This said, using the services and expertise of a local agent will no doubt make things a lot easier given that the agent will take over the tedious job of budgeting, planning and marketing the performance locally.

Whether you opt for one method over another, the Canadian High Commission can provide you with the names of key local contacts to assist in market entry. Our services seek to open doors for Canadian talent overseas with a view to increase export sales.

KEY CONTACTS

In Canada

Canadian Heritage

Trade & Investment Directorate - Trade Routes Program

15 Eddy, 6th Floor, Gatineau, Quebec K1A 0M5

Contact: Ms. Nancy Laberge, Senior Trade Development Officer (Sound Recording)

Tel: (819) 956-9425 Fax: (819) 953-5367

Website: www.pch.gc.ca

Canada Council for the Arts

12th floor, 350 Albert Street, Ottawa, Ontario K1P 5V8

Contact: Mr. Russell Kelley, Head – Music Section

Tel: 1-800 263-5588 Tel: (613) 566-4414 ext. 4241

Fax: (613) 566-4390

Website: www.canadacouncil.ca

Department of Foreign Affairs

Arts and Cultural Industries Promotion Division

125 Sussex Drive, Ottawa, Ontario K1A 0G2

Contact: Ms. Claire Marson, Head of Performing Arts

Tel: (613) 995-0668 Fax: (819) 992-5967

Website: www.international.gc.ca/arts

FACTOR- Foundation to Assist Canadian Talent on Records

355 King St. W, 5th Floor, Toronto, Ontario M5V 1J6

Tel: (416) 351-1361 F: (416) 351-7311

Website: www.factor.ca

High Commission of Canada in Singapore

80 Anson Rd, #14-00, Fuji Xerox Towers, Singapore 079907

Contact: Ms. NG Swee Leng, Public Affairs Officer

Tel: (65) 6325-3284 Fax: (65) 6325-3294

Website: www.international.gc.ca/singapore

International Trade Canada

125 Sussex Drive, Ottawa, Ontario K1A 0G2

Contact: Ms. Sylvie Morissette, Trade Commissioner (Sound Recording)

Tel: (613) 996-1144 Fax: (613) 992-5965

Website: www.international.gc.ca/arts

In Singapore

Media Development Authority

(Arts Entertainment License)

140 Hill Street, #04-01, MITA Building

Singapore 179369

Tel: (65) 6837 9973 Fax: (65) 6336 8023

www.mda.gov.sg

National Arts Council

140 Hill Street

#03-01 MICA Building

Singapore 179369

Contact: Mr Tan Boon Hui

Tel : (65) 6746 4622

DID: (65) 6837 9523

Fax : (65) 6837 3017

Website: www.nac.gov.sg**Recording Industry Association (Singapore) (RIAS)**

163 Tras Street, Lian Huat Building #04-00

Singapore 079024

Tel: (65) 6220 4166

Fax: (65) 6220 9452

Website: www.rias.org.sg**Singapore Police Force**

(Public Entertainment License)

Licensing Officer

Police Cantonment Complex Block D,

Blk 391 #02-70, 1Singapore 088762

Tel: (65) 6835 0000

Fax: (65) 6538 6647

Website: www.spf.gov.sg**REFERENCES**

Face-to-face interviews conducted by Hector Navarro and Anne Malépart with various local Singapore industry players including, distributors, presenters, venue owners and government officials.

Media Development Authority: www.mda.gov.sg (Policies and Guidelines for Radio)

National Arts Council: www.nac.gov.sg (Policies and programs for Music)

IS Magazine (free weekly entertainment magazine)

Treats (former free daily newspaper published by Mediaworks)

Today (free daily newspaper)

The Straits Times (daily newspaper)

Useful links for general data on Singapore:

Singapore Mirror: www.singaporemirror.com.sg

InfoMap: www.sg

APPENDIX 1

Arts Statistics in Singapore

Chart 1
Total Performance & Exhibition Days

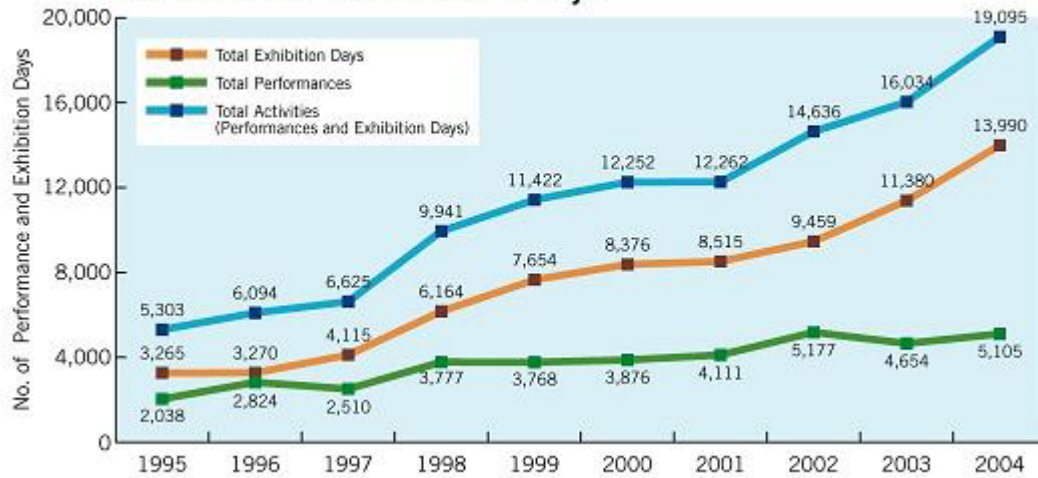


Chart 2
Performing Arts Activity



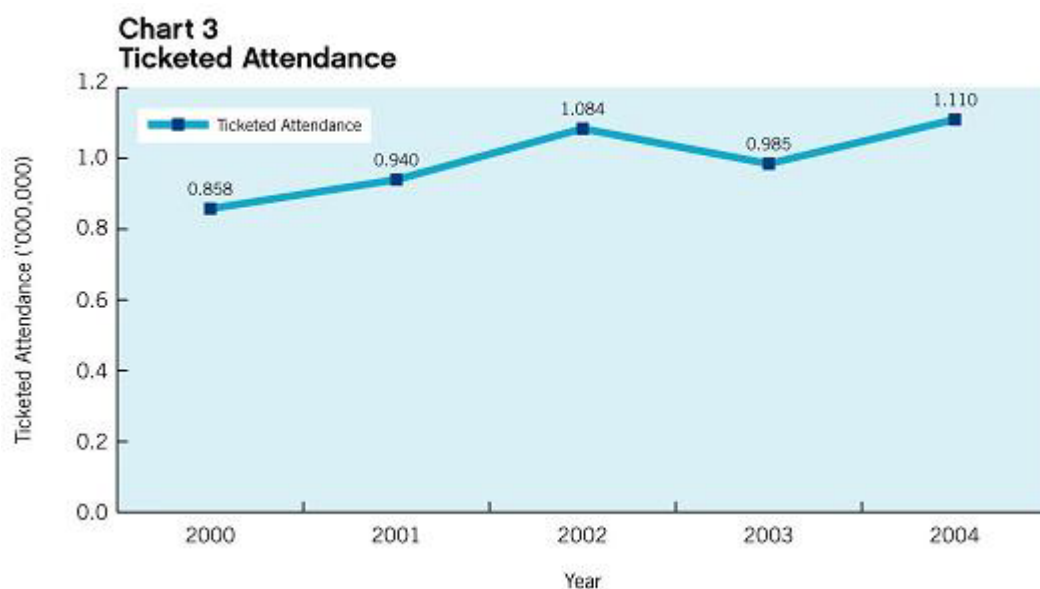


Table: Data on the Music Sector in Singapore

	1999	2000	2001	2002	2003	2004
No societies	59	61	64	69	72	81
No of companies	14	19	19	18	24	25
No of performing arts activities*	1,264	1,318	1,343	1,632	1,889	1,992
No of ticketed performances	500	525	535	602	610	741
Attendance for ticketed performing arts activities**	295,897	303,840	305,837	393,605	381,839	445,759

Source: National Arts Council, 2005 (<http://www.nac.gov.sg/sta/sta01.asp>)

* Includes both ticketed and non-ticketed performances.

** Performing arts refer to folk, traditional, classical and contemporary forms of dance, music, theatre and other performances. Popular entertainment shows (such as pop and rock concerts) are not included in the statistics.