



STRIKING A NEW A-CHORD

RECOMMENDATIONS FOR THE GROWTH & DEVELOPMENT
OF CANADA'S EAST COAST MUSIC INDUSTRY

This report was commissioned by the East Coast Music Association (ECMA), Music Canada, and Music Canada Live.

The authors of this report would like to thank the many people who generously contributed their time and expertise to this research. Many, if not all, of the interviewees are, or have been, engaged in the music sector in multiple capacities. As a result, this report has been enriched by the depth of their experience and their ability to speak from multiple perspectives.

The support of the five Music Industry Associations (MIAs)—Music Newfoundland (MusicNL), Music Prince Edward Island (Music PEI), Music Nova Scotia, the Cape Breton Music Industry Cooperative (CBMIC), and Music New Brunswick (Music NB)—has been instrumental and will be invaluable in ensuring that the recommendations in this report are realized.



FOREWARD

On behalf of the East Coast Music Association, Music Canada, and Music Canada Live we are pleased to present this study of the Atlantic Canadian music sector to our colleagues in music, government, and business throughout the region.

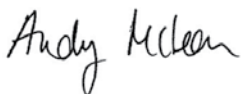
Atlantic Canada is home to an intensely proud and vibrant music community, and the regions share a rich cultural history. The East Coast continues to produce talented artists, musicians, and industry professionals who experience a strong sense of comradery, among many other commonalities. But while there is a wealth of talent, musicians and other industry stakeholders in the region are struggling to earn a living from their profession.

The findings are based on previous studies as well as new research, and more than 47 interviews with a wide array of individuals who work in and are connected to the Atlantic Canadian music sector. This includes representatives of government, members of the recorded and live music industries, local community leaders, and artists. Interviewees were deliberately drawn from across the region in what is intended to be a robust and representative sample.

Policy makers at all levels of government, music industry leaders, and community groups will find value in this report as a resource to better understand the strengths, weaknesses, challenges, and opportunities within the East Coast music sector.

The report is intended as a catalyst for the five regions to come together and fully realize the potential of the East Coast music sector. An Atlantic Canada Music Strategy, supported by the regional industry associations and government, would unite the music industry and collectively address the problems that artists, musicians, and industry professionals are facing.

We wish to thank the many people who generously donated their time and expertise to make this report a success.



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FOREWARD

Supporting local artists and encouraging the growth and development of our regional music industry are core concerns of the Music Industry Associations: Music NB, Music Nova Scotia, CBMIC, Music PEI, and MusicNL.

We are membership-based, non-profit organizations that provide education, advocacy, professional and market development, networking events, and administer funding for musicians and other industry professionals. We are often the first point of contact for emerging artists, and we provide essential services that might not otherwise be found on the East Coast.

This report demonstrates that there are key opportunities for Atlantic Canada and the provinces to further develop the music industry, nurture our cultural resources, enhance music tourism opportunities, and promote investment in music.

Atlantic Canada is home to an abundance of gifted musicians, talented songwriters, internationally touring artists, and dedicated industry professionals, all of whom are delivering economic and cultural benefits to the region. The history and cultural traditions of each of our five regions have created unique sounds and styles that have found national and international success in the past.

Now, compared to other regions in Canada, the East Coast lacks capital investment by major and indie record labels, agencies, publishers and other key parts of the industry. Combined with the global industry trends, this has made it increasingly difficult for musicians to make a living in Atlantic Canada. A solution is needed.

As this study will suggest, a cohesive Atlantic Canada Music Strategy will be critical in identifying gaps in the current suite of industry resources, will serve to unite the industry, and will increase the success of local artists. We endorse the report's recommendations and look forward to working with decision makers at all three levels of government, the music community, and other stakeholders to enhance support for music in Atlantic Canada.

We are stronger together, and are confident that if the industry and governments of the East Coast work together, in the spirit of regional cooperation and collaboration, so much more can be done to grow the industry, improve opportunities for artists, and deepen the economic, social, and cultural impact of music for Atlantic Canada.



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INTRODUCTION

This report has set out to study the strengths, weaknesses, opportunities and threats facing the music community in Atlantic Canada.

The report is structured in sections. Part I examines the strengths and assets found in Atlantic Canada's music community. Part II begins by laying out the effects of geographic, demographic and historical conditions in order to understand the factors at play in the region. PART III contains an overview of some of the macro level changes to the music industry which continue to affect the viability of music as a career and an industry. Finally, Part IV examines the challenges that exist and makes recommendations for governments, music industry leaders and community organizations.

The primary focus of this report is on the commercial music sector, including live and recorded music, music professionals, and physical infrastructure. To be representative of the true breadth of the music sector the research scope was broadened to include classical and traditional music (i.e. Celtic, Acadian, orchestras, and choral musicians). Music education is explored as well, underscoring the clear linkages between regional culture, early music education and post-secondary programs and partnerships, and their effects on the music sector as a whole. The development of a coordinated Atlantic Canada Music Strategy supported by an investment in the regional ecology of the music industry in the form of an Atlantic Music Fund will synchronize policies and actions and amplify the economic and social contributions of music, ensuring the music of the East Coast will play on for generations to come.

Atlantic Canada has long boasted a reputation as a musical region. The dedicated work of the East Coast Music Association (ECMA) and non-profit Music Industry Associations (MIAs), supported by provincial and national funding bodies, serve talented and driven musicians and music professionals in communities, both small and large, across the region.

Export development programs curated by the ECMA and the region's MIAs, bring foreign investment directly to the East Coast and advance Atlantic artists' careers in foreign markets. The Return On Investment (ROI) on export development programs is just one of many examples discussed within this report which have demonstrated, year-over-year, the viability of investing in music in Atlantic Canada.

The ever-present threat of austerity measures to address provincial budgetary challenges continues to place the MIAs, and the thousands of musicians that they serve, at risk. The most recent example was occurring during the writing of this report when departmental restructuring in Newfoundland and Labrador struck fear in the cultural community that their supports would be reduced.

In contrast, recent recognition of the cultural and economic importance of the music industry has lead provincial governments in British Columbia and Ontario to launch dedicated funding programs. The Ontario Music Fund (OMF), originally launched as a \$45 million-dollar annual investment for a period of three years, has proven to be so successful that the funding has become permanent.¹ Although the OMF is relatively new, Atlantic Canadian musicians interviewed for this report have reported an increase in business expenditures in Ontario for recording and professional management, demonstrating that well-designed investment programs may draw expenditures from outside the jurisdiction. It is worth noting that Music Nova Scotia says it's provincial funding, by far the healthiest in the region, coupled with the new Creative Industries Fund for all creative sectors, matches the OMF when measured by per capita, making it an exception in the region.²

In the face of the competition from outside the region, stakeholders in Atlantic Canada's music industry are increasingly looking at their regional counterparts to coordinate, share expertise, and further develop the notion that a regional strategy would provide the necessary counterweight to attract and retain talented musicians and music professionals in the region.

At the same time, as provincial investment in music continues to draw talent and cultivate the music industry in BC and Ontario, musicians and music businesses in Atlantic Canada are faced with macro-level challenges disrupting traditional business models, revenue streams, and music consumption by the general public. These macro-level

changes to the music industry are compounded by policies and regulations impacting artists and music businesses at the federal, provincial, and municipal level. This report outlines the role and impact of regulation on the music industry from each level of government and offers recommendations to reduce barriers.

Results are in. The music industry in Atlantic Canada is at a critical juncture. To address the tough challenges faced in the region coordinated action is needed. Without targeted action to draw and retain industry knowledge and talent in Atlantic Canada, the hard-won reputation of Atlantic Canada as a musical region is in danger.



CYNDI CAIN / PHOTO BY DAVID HISCOCK

EXECUTIVE SUMMARY

Music is intricately connected to the history and diversity of the Atlantic region; it is a critical part of East Coast traditions. As a result of this deep cultural history, Atlantic Canada has a history of success when it comes to educating, incubating, and exporting talented musicians and songwriters.

SHARED STRENGTHS

CULTURE OF ATLANTIC CANADA

Atlantic Canadians across many backgrounds possess a unique and authentic culture to which music is fundamentally tied. Music is a part of growing up in the region, and this striking cultural and geographic ‘quality of place’ has served as inspiration for generations of musicians.

MUSIC EDUCATION

From primary school through to post-secondary the role of music education in nurturing the musical culture and the abundance of talent found in Atlantic Canada is integral to the sustainability of music as a cultural identity and a commercial industry.

TALENT

There is an abundance of passionate and talented musicians in Atlantic Canada, which in large part, can be traced back to the culture of Atlantic Canada, the success of provincial investments in music education and government support for the arts and non-profit industries.

MUSICIAN CAMARADERIE

There is a willingness among Atlantic Canadian artists to share their experiences, mentor, and help one another; musicians and music professionals from the region see one another as colleagues and work to lift each other up.

MUSIC INDUSTRY ASSOCIATIONS AND THE ECMA

Atlantic Canadian musicians and industry professionals have access to the support of six non-profit Music Industry Associations which, among their other responsibilities, represent the industry, offer professional skill development, and develop strategies to export East Coast music to new markets.

MACRO CHALLENGES

The broader music industry has undergone significant changes in the past twenty years. Artist entrepreneurs and small and medium size music businesses found in Atlantic Canada have endured through these challenges but are constrained by the narrow options available in the Atlantic region.

CHANGING BUSINESS MODELS IN THE MUSIC INDUSTRY

The stagnation of ticket prices, the shift to online music streaming, and restrictions on live venues and events have had dramatic effects. Legislative failures to protect the intellectual property of musicians and other content creators have led to problems such as the value gap. The convergence of these, and other issues have made it harder now than it has ever been for artists and musicians to earn a living.

REGIONAL ISSUES AND OPPORTUNITIES

DEVELOPING REGIONAL CAPACITY

Research for this report confirmed that there is an alarming lack of industry infrastructures, such as music publishing companies, agents, publicists, bookers, and artist managers in the region. This situation is poised to intensify as the gaps in succession planning become apparent as existing music professionals retire, leave the industry, or relocate where music is better valued. There are too few people in Atlantic Canada with the skills and knowledge necessary to fill their shoes.

The institutional knowledge held by active music professionals and industry associations in the region could be leveraged to strengthen the entire region by developing a strategy to develop opportunities and processes to share knowledge within the region, expand upon the existing capacity, and pass on knowledge to the next generation.

A VALUABLE ECONOMIC CONTRIBUTOR

Categorizing music as a primarily cultural endeavour has had the unintended effect of limiting economic opportunities for musicians. In addition to creating and performing music, many artists in Atlantic Canada are also entrepreneurs, handling the business side of their work as well—though they aren't compensated for the additional effort and are often ineligible for business loans.

At the root of this issue is a failure to recognize music as a legitimate and economically productive occupation, above and beyond its intrinsic value as a social good.

MUSIC CITIES FRAMEWORK

Municipalities of any size can benefit from the 'Music Cities' model to reduce barriers to music sector growth, support the live music sector by protecting existing music venues, create spaces for music such as arts districts, hubs, and rehearsal spaces and embrace the benefits of the nighttime economy in policy and decision making.

LIVE MUSIC AND AUDIENCES OF ALL AGES

Live music venues are a crucial component of the music ecosystem and one that is heavily affected by government regulation. In addition to stringent liquor laws, which limit performers and audiences to those of legal drinking age, red tape—often outdated regulations that have had unintended consequences—are costly and disadvantageous for live music businesses and the lively and robust communities of all ages that they serve. As notable venues face the threat of closure, swift action is necessary to modernize the rules and regulation surrounding live music. Additionally, opportunities for landlords, property developers, and independent business owners should be identified to incentivize the opening of new venues and the sustainability and protection of existing ones.

MUSIC TOURISM

Music tourism brings new money to a region. Tourists travelling to experience live music spend more on hotels, restaurant meals, and other local attractions. Musicians and industry professionals are keen to collaborate with tourist boards to develop a robust and mutually beneficial music tourism strategy which would bolster Atlantic Canada's identity as a place of music and bring direct and indirect benefits to the region.

MAIN RECOMMENDATION

AN ATLANTIC CANADA MUSIC STRATEGY

A coordinated Atlantic Canada Music Strategy, coupled with a new Atlantic Music Fund, developed with the cooperation of stakeholders from across the region would synchronize activities and policies in the region and amplify the economic and social contributions of music. A key focus of such a strategy would address the lack of industry infrastructure in the region with a coordinated, pan-Atlantic response. An Atlantic Music Fund would provide the resources necessary to fill gaps and complement existing programs, attract investment, and develop and incentivise musicians and music related business to reinvest in Atlantic Canada.

Crucially, an Atlantic Music Fund would need to be financed via new money, and would not draw on existing municipal, provincial or federal investment opportunities currently accessed by the Atlantic Canadian MIAs or related cultural industries. The introduction of an Atlantic Music Fund must also ensure that existing MIA investment, as well as funding accessed by creative industries and cultural organizations, is not prorated or decreased as a result of the introduction of a new investment strategy.

HISTORY AND ROLE OF THE ECMA AND ATLANTIC MIAS

Founded in 1988 as a registered non-profit, membership-based association, the East Coast Music Association (ECMA) is a regional collaboration of Atlantic Canadian music industry professionals whose mission is to advance and celebrate East Coast Canadian music, artists, and industry professionals, throughout the region and around the world. It advocates for its members to ensure they can sustain careers while based in Canada's Atlantic region.

The ECMA annually produces the East Coast Music Awards, one of the top music industry events in Canada, which includes the awards, a festival, an industry conference and the acclaimed international export buyers program. Over the past 29 years, the association has been witness to the successes and struggles of hundreds of Atlantic artists and has been a catalyst in bringing music industry representatives from all over the world to the East Coast to discover one of the region's greatest exportable resources – East Coast music.

ECMA nominations, along with provincial industry award nominations, serve as a platform for Atlantic acts to access broader national and international career opportunities. The pipelines to success for Atlantic acts is much more direct as a result of the emergence of the ECMA and Music Nova Scotia.³ These organizations (and the industry awards they produce) serve to professionalize the music industry and legitimize music coming from the 'East Coast.' The careers of artists such as Sarah McLachlan, The Rankins, and Ashley MacIsaac can be traced back to the work of ECMA and Music Nova Scotia.

Marcel McKeough, Executive Director of Nova Scotia Department of Communities, Culture, and Heritage, has been a champion of the music industry during his three decades in the department. McKeough said, "Music has always been a key element of cultural expression and it really was, probably the most promising part, of the cultural industries in Nova Scotia for a long time – even though the craft sector goes back a long ways – so does the music industry. Once [the province was] able

to identify it as an industry and install industry elements, like a music association, like an awards mechanism – it just took off. And within 10 years – in its earliest days – the growth was exponential. It doubled, more than doubled, every year.

I think that the music industry has always been a key element. It's always held great promise, and it's always achieved at a high level. I think that's what drove all of our desires and made it a worthy place to invest."

Success begets success, and music industry organizations in neighbouring provinces began to emerge. There was, and continues to be, a clear need for local music industry expertise and advocacy. The music industry organizations which emerged later were conceived to service distinct local needs, within their regional political and economic contexts.

As a result of their organization's capacity, budgets, and complementary jurisdictions the ECMA and Atlantic MIAs operations vary widely. However, Music NB, Music PEI, Music Nova Scotia, MusicNL, and the ECMA are similar in that each is responsible for programming a music week and awards show, whereas CBMIC is not. Without exception, each one of the six organizations is the main source of training and professional opportunities for career advancement to their members. Still, there are significant differences in terms of administering investment funding. Music PEI, MusicNL, and Music Nova Scotia have long been responsible for the administration investment programs on behalf of their respective provincial governments whereas CBMIC delivers investment programs primarily through partnerships with federal and municipal bodies. For Music NB, 2017 signals the beginning of a two-year transition where the organization will take over management of the funding programs for the province for the first time. Furthermore, in terms of jurisdiction, Music Nova Scotia's investment catchment for artists includes Cape Breton which is otherwise represented by CBMIC.

Across the Atlantic Canadian music sector many strengths, goals, and desires are shared. Without the MIAs, the whole of the Atlantic Canadian music industry would be far less competitive in today's global marketplace. 🎵

1 | REGIONAL ASSETS

We begin by identifying the core strengths and assets of the music community in Atlantic Canada.

MUSIC BENEFITS EVERYONE

Public health research has stated that “cultural values, such as sense of place and community protect the mental health and well-being of those living in the Atlantic Region.”⁴ A thriving music community has been shown to cultivate a strong sense of place and strengthen feelings of community inclusion.

Music is a fundamental part of East Coast traditions. It is intricately connected to the history and diversity of the Atlantic region. It is this rich, varied, and deep cultural history which created the conditions for the Atlantic Canadian music industry to set off the East Coast music explosions of the 1970’s, 80’s, and 90’s.

HISTORY OF SUCCESS

Atlantic Canada is home to numerous bands and musicians who have achieved success by exporting their music to the rest of Canada and around the globe. Examples from across the region include: The Rankin Family, Anne Murray, Joel Plaskett, Jerry Granelli, Radio Radio, Classified, Hey Rosetta!, Lisa Leblanc, Rose Cousins, Wintersleep, Matt Mays, Dean Brody, George Canyon, Ryan Hemsworth, Ten Strings and a Goat Skin, Fortunate Ones, The East Pointers, Always, Lennie Gallant, Les Hay Babies, and Ria Mae.



RAPHAËL BUTLER / PHOTO BY HL LOKER

MUSIC INDUSTRY ECONOMIC DATA

Each year millions of dollars in revenue, including taxes for all levels of government, is generated in Atlantic Canada through the work of music industry professionals and musicians. SOCAN alone paid out royalties of more than \$2.7 million dollars to Atlantic Canadian songwriters and music publishers in 2015.⁵

The chart below includes available economic data compiled from the most recent studies, but they are not comprehensive. Notably, there has been no recent study of the impact of Nova Scotia’s music sector. In order to make a more nuanced case for the economic contributions, and the effect of future policies and investment programs, a comprehensive study of the economic impact of the music sector, including live performance, across the Atlantic region is needed.⁶

However, some important assumptions can be made based on the available information. It is significant that, despite a small general population, the PEI music sector supports over 800 artists and generates \$23.9 million in economic impact. In fact, the size and economic impact of the music sector in all three provinces is substantial, especially when viewed relative to their populations.

In both PEI and New Brunswick, the live music sector is a critical driver of music industry revenues and jobs. Not only does this represent activity among the businesses and professionals who produce live music, but as noted above, also represents an important component of artists’ income. According to the New Brunswick economic impact study, “the most prominent music business activities in New Brunswick were in the live music sector,” and this includes promotion, event management, and artist management.⁷

	NEW BRUNSWICK (2015)	PEI (2015)	NEWFOUNDLAND AND LABRADOR (2009)*
ECONOMIC IMPACT (GDP)	\$65.2 million	\$23.9 million	\$61.31 million
ECONOMIC IMPACT (LABOUR INCOME)	\$41.2 million	\$10.4 million	\$49.89 million
ARTISTS	676	805	**
FTE JOBS	954	244	1,512

* Data limited to members of MusicNL and as such does not capture the full scope of the industry. ** Number of Artists is included within the FTE Jobs data for Newfoundland and Labrador

It is important to note that interviewees from all Atlantic regions identified the music industry infrastructure in Nova Scotia as the largest in the East Coast, therefore, it is reasonable to suggest that an economic impact study of music in Nova Scotia would add substantially to these figures. Recent royalty data provided by SOCAN for Atlantic Canada also supports this observation.

SOCAN ROYALTIES

Through a complex system of licensing at the point of performance whenever music is performed, whether that be live or from a recording, a royalty payout is owed to

the writer of the song and/or a music publisher. In Canada, this licensing revenue is collected by SOCAN which then distributes the royalty payments to the rights holders. For songwriters, these royalty payments are an ongoing source of revenue for the music they perform and publish.

Today, less than six percent of Canada’s population⁸ resides in Atlantic Canada. Royalties collected by SOCAN and paid to Atlantic Canadian artists represent four percent of all Canadian general licensing and live music revenue.⁹ It is hoped that recent administrative improvements will

increase the total payouts to all rights holders across Canada. Specifically, artists and other copyright holders must complete an application and submit documentation to SOCAN before collecting royalties legally owed to them. Until recently, this process was labour intensive and took several weeks to complete. A recent update has enabled the application to be completed electronically in under 10 minutes. The simplification of this registration process could cause a spike in future royalty revenue distributed to Atlantic Canadian artists.

The following chart shows the SOCAN royalty payouts in Atlantic Canada for the 2015 calendar year.¹⁰

PROVINCE	SUM OF EARNINGS
NEW BRUNSWICK	\$456,020
NEWFOUNDLAND AND LABRADOR	\$433,598
NOVA SCOTIA ¹¹	\$1,666,124
PRINCE EDWARD ISLAND	\$157,208
GRAND TOTAL	\$2,712,950

When looking at the entire region, five strengths are shared by all five districts:

- Musical culture;
- Provincial investment in music education;
- Abundant talent;
- Musician camaraderie; and,
- Resources provided by ECMA and MIAs

A NURTURING ECOSYSTEM

An analysis of the interviews conducted for this report revealed how the relationship among five factors resulted in a unique environment which has contributed to the significant number of talented artists and musicians which have emerged from such a geographically vast yet sparsely populated region. Those five factors are strengths shared by all five districts and include: musical culture, provincial investment in music education, abundant talent, musician camaraderie, and the resources provided by the ECMA and the MIAs.

Each one of these five factors alone can produce a musician or music professional, however, as more of these factors converge, careers accelerate and the likelihood of economic and critical success increases. The reverse is also implicated, career trajectories are slowed or halted when resources are removed, such as cuts to music education budgets, or reductions in funding to non-profit music associations.

Music is an essential part of the diverse cultural fabric in Atlantic Canada and that culture has historically supported quality music education in the public school system, creating an environment which has produced the abundance of talent that is so characteristic of Atlantic Canada.

The musical culture and access to quality music education have, in turn, contributed to the presence of the collaborative and co-operative approach described by the music community. When Atlantic Canadian musicians and music professionals within this environment have access to locally based music industry infrastructure, such as the services provided by the MIAs and the ECMA, they are able to access opportunities and resources which can accelerate careers and, in turn, strengthens the core of the Atlantic music industry.

The following sections offer insight into the crucial role that each of these five factors plays in the success and sustainability of the music industry in Atlantic Canada.

CULTURE OF ATLANTIC CANADA

Music is an expression of culture and this genuine reflection of place has sustained the authenticity of the Atlantic Canadian music scene. The geography of Atlantic Canada, the isolation of its communities—whether by physical distance or geographic enclosure of land and sea, have maintained the strong relationship between Atlantic Canadian musicians and their homeland.

“There is authenticity here,” confirms Bob Hallett, owner of Kilbride Music, “Newfoundland’s isolation means that it’s culture is still intact. Newfoundland has a flavour and a vision and a creative aesthetic—a storytelling tradition, that is still quite healthy and it doesn’t exist in other parts of North America.”

“We have an amazing music community here [in Newfoundland]. There is a staggering number of artists in every musical genre. We’re also an island, which means that most of the music we see here is our own music because it’s harder to tour here. In as much as it is harder to get art here, a lot more art is made here because we all still want to see it,” said Erin Best, president of Kitchen Party.

Asked to explain what contributes to the community spirit found in Atlantic Canada, Serge Brideau, an Acadian musician with the band Les Hôtesses d’Hilaire, said, “Here, our identity is so tied in with the music. So I think that the attitude of openness and sharing, that is very fun and specific to this region, is important for us. As people from the East Coast, as Acadians, as First Nations, ...the need to sing, to write music, to talk about who we are, and where we’re going, is universal.”

The deep-rooted, and varied, musical identities found within Atlantic Canada have ensured that, historically, music was taught within the public education system, shared in the home, celebrated within the community and passed on to future generations of musicians and audiences.

MUSIC IN THE HOME

The cultural environment of music in the home introduces children and young people to playing music and performing in a casual, low-pressure way. Kids grow up in an environment where it’s often taken for granted that you can learn and play music.

“*In as much as it is harder to get art here, a lot more art is made here because we all still want to see it.*”

— ERIN BEST

“If you play music, well, there’s probably a guitar or piano about your house. You don’t have to go out and buy one,” says Albert Lionais, a musician, and operations manager for CBMIC, “whereas if you want to play hockey, you’re looking at hundreds, if not

thousands of dollars-worth of equipment that is only going to last you until you grow out of it. A guitar is with you for—I mean, I have guitars that are older than I am. They’ve been in my family for longer than I’ve been alive.” Music is everywhere you look and people who live here have numerous informal opportunities to cut their teeth and try their hand at music.



BEN CAPLAN / PHOTO BY HL LOKER

CULTURAL AND GEOGRAPHIC ISOLATION

The relative geographic isolation of Atlantic Canada has been credited with cultivating the strong cultural identity of music in the region and allowing musicians to develop their signature sounds without major influence from away. “The isolation and the geographic struggles with living here make it very difficult to move up in the ladder of the industry, but at the same time they allow for, perhaps more, free expression,” said Joella Foulds, former executive director of Celtic Colours International Festival, in Cape Breton.

The geography is an unmistakable influence on the art and the commerce of the industry, particularly for those in Cape Breton and Newfoundland and Labrador.

RECOGNIZING THE UNIQUE QUALITY OF PLACE

The Atlantic scenery is one asset that cannot be duplicated or reproduced and Atlantic Canadian musicians have long woven the place they call home into their music as well as their business plans. A wooded area in rural Prince Edward Island presents an unparalleled setting for the professional recording studio built by Catherine MacLellan, an award-winning musician based in PEI, and her partner. As business operators, they were keen to build the studio in a rural area where high rent and steep land taxes were a non-issue. For professional musicians like MacLellan, escaping from the cacophony of modern digital life during the recording process is a welcome reprieve. So when it came time to decide on a location, it was the prospect of creating music within the tranquil island environment, nestled in the woods, that determined the studio location. “It’s so beautiful, and quiet. You can really focus on your work. I really like that.” says MacLellan. “You go, and there’s no distractions.”

“*The isolation and the geographic struggles with living here make it very difficult to move up in the ladder of the industry, but at the same time they allow for, perhaps more, free expression.*”

– JOELLA FOULDS

A CAPTIVE AUDIENCE

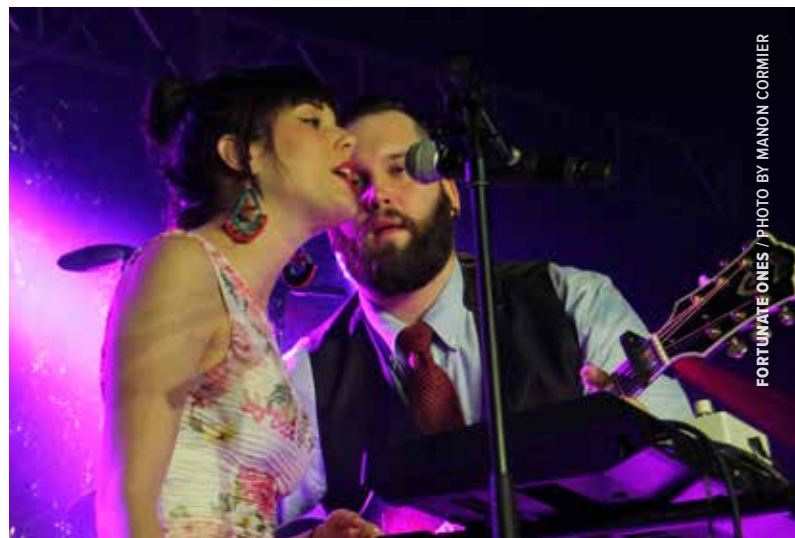
While for fans, factors such as venue location, driving distance, cost, and the inaccessibility of late night performances certainly weigh against the decision to seek out live performances, the culture in Atlantic Canada encourages people to appreciate live music.

Bob Hallett, of Kilbride Music, explains the benefits of artist development in Newfoundland, saying “the fact that there is such an appetite for live performance means that performers have a lot of opportunities to play, and opportunities to learn their trade. A lot of [musicians get] out of their basement. That gives them a great edge in terms of entering the wider world.

They’ve already had a healthy apprenticeship in front of others, so they’re not starting cold the way so many other younger artists are.”

COMMUNITY RECOGNITION

“There is the overall feeling that people understand the value of music within our community. It’s not just a thing that people do. Within our community people understand that it’s a real job and that cultural value is really important,” says musician Catherine MacLellan. “I don’t know that the government acknowledges that – but within our community, it is acknowledged.”



FORTUNATE ONES / PHOTO BY MANON CORMIER

MUSIC EDUCATION

OF UNIVERSAL VALUE

Music education in Atlantic Canada is highly valued, according to our interviews. Nearly every person interviewed made a point to explicitly identify music education as an essential piece of the Atlantic music industry.

Interviewees made it clear that music education benefits more than individual musicians. Music educator and president of the Canadian Music Educators Association, Kirsten MacLaine explained that the importance of teaching kids music is wider reaching than the output of future professional musicians. MacLaine said that kids who have access to quality music education “will go on to take the skills they learn in music and apply them to other areas in their lives. Music teaches so much more than just music. It teaches discipline. It teaches collaboration. It teaches problem-solving. It teaches performance. It teaches teamwork, and getting in touch with your emotional side and being able to express yourself.”

The availability of a music specialist from elementary school onward and music programs with the necessary resources and instruction was frequently identified as an essential component of the broader music ecosystem. The decision to provide children and youth with the opportunity to define their identity within music, whether that be composing classical or electronic music, instrumental band, or business or technical side including band management, sound and lighting design, audio engineering, and publicity and marketing, goes beyond the school’s walls. Investing in quality music education gives students the tools to critically engage with a medium that is shared around the world.

For musicians, experiences with early music education, with theory, instruction, and performance opportunities ranging from string instruments, jazz, concert or show bands, piping, choir, and other types of performance lead them toward a life-long relationship with music.

Speaking of how she came to be a musician, Josée Caron, of the New Brunswick band, Partner, said, “Music education in school was a big one. Huge. As part of our music program, I used to be in a jazz combo and

something called ‘show band’ where we got to play all these sick classic rock songs. It was a pretty big deal for me, I got a lot of positive reinforcement from that.”

Participation and engagement with the creative night-time economy as adults was attributed to the availability of quality music education. Kirsten MacLaine explained how music education in PEI, one of several Atlantic provinces which ensure

a music specialist is available in every elementary school, develops the audiences of the future who go on to invest time and money in the local arts community. “The number of people that I know who really value music education, who really participated in music, who were great musicians even in high school – they might not go on to play professionally, but they show up. They show up to concerts. They show up to musicals. They support those things because they value them and they understand the work behind them.”

“ Music teaches so much more than just music. It teaches discipline. It teaches collaboration. It teaches problem-solving. It teaches performance. It teaches teamwork, and getting in touch with your emotional side and being able to express yourself. ”

– KIRSTEN MACLAINE

INVESTMENT IN IDENTITY

Music education is an investment in the identity of Atlantic Canada. Students, music educators, and the local music community benefit when each Provincial Ministry of Education continues to invest in music programs and up-to-date curriculum. The correlation between quality music education and a thriving and resilient music community is clear. When music is embedded into the curriculum it maintains the integrity of the larger music ecosystem. When music programs are strong, just as when music programs are targeted by cuts or when music specialist positions go unfilled, the ramifications in the community can be felt for decades to come.

TALENT

Interviewees from throughout the region agree that there is no shortage of musical talent in Atlantic Canada.

“I think the greatest strength in Nova Scotia, and across the whole region, is our musical talent. We have music. It’s bred into our culture and it has been for many generations. If you look at the raw musical talent that we have here, it’s

a really big part of our cultural fabric, there is no denying it,” said Ian McKinnon, president of GroundSwell Music, an indie management company, and label based in Halifax.

The cultural influences have created the environment from which the storied music talents of the region have emerged, such as Natalie McMaster, Matt Anderson, Gordie Sampson, Great Big Sea, Sloan, and the late Portia White, Ron Hynes, Stan Rogers, Rita MacNeil, and Stompin’ Tom Connors.

Speaking of Newfoundland and Labrador, Erin Best, a practicing lawyer, and president of Kitchen Party, a think tank focused on the music industry, said, “I’ve never been anywhere in my whole life where there was such high caliber talent—and so much of it per capita! It slaps you right in the face. There is live music here all of the time. There is live music at every party I go to, at everybody’s house. Most people sing or play the guitar. Pretty much every family has somebody who performs or a group. It’s kind of ubiquitous.”

Research for this report found that the bounty of talent emerging from Atlantic Canada is a result of multiple inter-related factors.



TRANSATLANTIC ZODIAC ENSEMBLE / PHOTO BY REBECCA HARTERY

Interviewees identified the following contributors to the talent of the region, many of which are discussed in depth elsewhere in the report:

- Rich mix of cultures with strong musical foundations;
- Inter-generational transmission of music through family and local community;
- Historical investment in high quality public music education;
- Access to high-quality post-secondary music education;
- Programs, investments, and advocacy offered by provincial MIAs and the ECMA;
- Public investment in Arts and Culture, including music;
- Active and supportive local audiences;
- Collaborative music scenes and hard-working musicians;
- Strong reputation of musicians and distinct 'East Coast' sound;
- High-quality music festivals, performing arts centres and venues;
- Local exemplars of nationally and internationally successful musicians and groups; and,
- Geographic and environmental isolation.

MUSICIAN CAMARADERIE

Atlantic Canadian musicians and music professionals, including the live sector, see one another as colleagues and work to lift each other up.

Glenda Tulk, Executive Director of MusicNL, explains, “All the musicians support each other. When there is a need they help one another. They help one another get gigs. They help one another when they need gear. They help one another when they need transportation. They’re very supportive.”

At the heart of the Atlantic Canadian music industry there is a perception of a camaraderie, an openness among artists to share and mentor one another—an attitude which is intrinsically connected to the culture.

Adyn Townes, a musician based in New Brunswick, knows the support of the Atlantic Canadian music community well. Recently \$4000 worth of rented musical equipment was stolen out of his vehicle. The social media post he wrote about the robbery garnered nearly two thousand shares. “The majority of those people were artists whom I have played with,” noted Townes, “It was one of those beautiful things because it did reaffirm for me how strong our community really is.”

The gap in locally-based music professionals likely contributes to the comparative lack of competition between musicians and the few music professionals within a scene. There seems to be an understanding that in Atlantic Canada it is better to maintain the reputation of a vibrant scene and lift up your fellow musicians than it is to try to undermine your competition in order to get ahead. Most interviewees expressed deep pride to be part of the collaborative community here. There is an understanding that without the sincere co-operation of the music community, there would be no music industry at all.

MUSIC INDUSTRY ASSOCIATIONS AND THE EAST COAST MUSIC ASSOCIATION

Atlantic Canada is home to five Music Industry Associations¹² geared towards musicians and music professionals: Music NB, Music Nova Scotia, CBMIC, Music PEI, and MusicNL. The ECMA acts as a pan-Atlantic industry organization with a strong focus on developing opportunities for export-ready artists.

PROVIDING OPPORTUNITIES FOR SUCCESS

In the absence of large-scale corporate music industry infrastructure in Atlantic Canada, the region's MIAs provide essential services to thousands of musicians. Even in an increasingly digital world, musicians and industry professionals need locally-based resources. In Atlantic Canada, where there are very few medium or large-scale music companies able to provide the

security of a salary or on-the-job training for music professionals; or artist development, and advances or tour support for artists, many musicians are artist-entrepreneurs who rely on personal experience, education, professional development and networking opportunities organized by the MIAs.

Services, such as export-development programs, professional skills workshops, award shows and conferences, networking opportunities, one-on-one advice, and resource-sharing are part of the holistic range of much-needed training and professional development delivered by the MIAs and ECMA.



THE TOWN HEROES / PHOTO BY PAM SAMSON

2 | DEMOGRAPHIC PROFILE

THE POPULATION OF ATLANTIC CANADA

PROVINCE ¹³	2016 POPULATION	2011 POPULATION	GROWTH RATE
NEWFOUNDLAND AND LABRADOR	519,716	514,536	1.0
PRINCE EDWARD ISLAND	142,907	140,204	1.9
NOVA SCOTIA	923,598	921,727	0.2
CAPE BRETON ¹⁴	132,010	135,974	-2.9
NEW BRUNSWICK	747,101	751,171	-0.5
TOTAL*	2,333,322	2,327,638	2.47 %

*Population of Cape Breton shown here is included within the population of Nova Scotia.

It is vital to understand the demographic factors affecting musicians, music businesses, and venues in the East Coast. The population of Atlantic Canada is spread out across four provinces, five districts, several cities, and three large islands.

Adding to the geographic challenges, the region continues to navigate a longstanding trend which sees young people emigrating out of the region while an older demographic immigrates to the region.

Atlantic Canada is home to a population of over 2.3 million people, and yet Atlantic Canadians living in the region make up only 6.6 percent of the total Canadian population, a percentage which has declined over time.¹⁵ Atlantic Canada remains largely rural,¹⁶ and this dispersion of population has long been a challenge for federal and provincial governments striving to provide services like schools, health care, and basic infrastructure to all residents in a meaningful and cost-effective way.

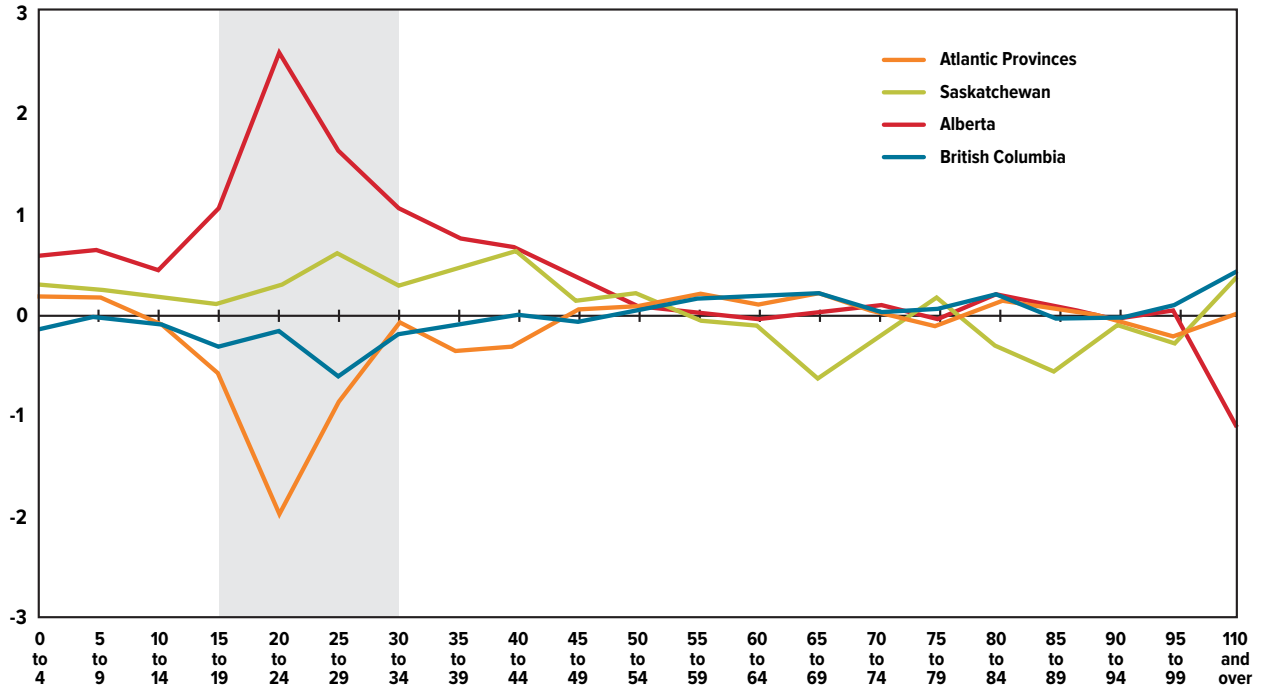
In the same way, music businesses and artist-entrepreneurs struggle to establish localized revenue streams within these small and widely dispersed consumer markets. Eleanor Dawson, former director of Arts for the Arts and Heritage branch of the Department of Business, Tourism, Culture and Rural Development for Newfoundland and Labrador, says that, “It’s difficult for musicians to make a living in a small population. It’s necessary for them to tour extensively, and that’s really hard to do out of Newfoundland.” The same is true throughout the East Coast.

Despite support from the region’s live music promoters and presenters, touring within the East Coast is expensive and time consuming, often requiring significant additional expenses, like ferry and bridge tolls, just to get from one major centre to the next. The complex challenges of touring Atlantic Canada were echoed by many of the musicians and professionals we interviewed.

OUT-MIGRATION OF YOUTH

Attracting and keeping youth in Atlantic Canada is one of the most pressing issues the region currently faces. This is a particularly disturbing trend for the music industry.

Distribution of net interprovincial migration by age group in the Atlantic provinces, Saskatchewan, Alberta and British Columbia, Canada, 2011/2012



Source: Statistics Canada, Demography Division, Population Estimates Program

The figure above shows the age distribution of interprovincial migration in Atlantic Canada. The data shows that a significant number of people leave the Atlantic provinces when they are young, especially between the ages of 15 and 29.

Darren Gallop, a veteran of the music industry and CEO and co-founder of Marcato Digital Solutions, a tech company based in Cape Breton, has noticed that this trend tends to compound itself. “We’ve recruited people from away who have decided after a year that they don’t want to stay. Because, they’re like, ‘You know what? I’m 25 years old, I’m single, and I’m never going to find a mate in this town because there’s not enough people! Where the hell is everybody?’”

When young people leave, the region loses emerging artists, future business leaders, and the very audiences who would be most eager to experience live music at bars, clubs, and festivals. Many live music venues rely upon patrons within this age group to sustain their businesses and are suffering as a result of this trend.

3 | MACRO CHALLENGES

This section examines issues globally affecting the music industry and provides context for the additional challenges faced by the music community on the East Coast.

CHANGING BUSINESS MODELS IN THE MUSIC INDUSTRY

It is harder now than it has ever been for artists and musicians to make a living. According to a 2013 study from the Canadian Independent Music Association (CIMA), independent artists earned an average of \$7,228 per year from music-related activities in 2011, working an average of 29 hours a week.¹⁷ “This reflects the sharp erosion of the ability of artists, especially young ones struggling to build a career, to earn a living from their creative work,” said Graham Henderson, president of Music Canada, speaking to the Economic Club of Canada in November 2016.¹⁸

RISE OF ILLEGAL DOWNLOADING

These circumstances are, in part, the result of the dramatic changes to the global music industry which have occurred over the last two decades. The erosion of the artist and industry revenue previously earned through the sale of physical copies of recorded music was precipitated by the widespread consumer adoption of illicit peer-to-peer file sharing of recorded music.¹⁹ The format shift from physical CDs to legal and illegal digital downloads cut deeply into music industry revenues and artist incomes. In Canada, in the eight years leading up to 2006, retail sales of recorded music declined by 51.2 percent, from about \$1.5 billion down to \$703.6 million.²⁰

These shifts have not been reflected in policies and programs which were originally designed to frame and support the music industry.

“Here we are, we’re still stuck in reporting, ‘How many CDs did you sell? How many units did you sell?’ Well, actually none, because they don’t sell anymore,” explained Peter Rowan, owner of Peter Rowan

Management based in New Brunswick, “The policies got caught into a particular period of the industry when it really was all about CD sales and all about the radio.”

SHIFT TO ONLINE STREAMING

The recent shift in consuming music digitally via online music streaming has brought even further revenue ambiguity for artists and

the music industry. According to IFPI’s 2016 Global Music Report, music streaming has become the industry’s fastest growing revenue source. But while consumption of streaming services has increased, the revenues paid out to rights holders, such as artists and record labels, from the ad-supported streaming services have not kept pace. For example, YouTube, a free streaming option, had over 900 million users in 2015 and contributed only 4 percent of global music industry revenue – compare this to paid streaming services, with 68 million users, which contributed more than three times that amount.²¹

“The policies got caught into a particular period of the industry when it really was all about CD sales and all about the radio.”

– PETER ROWAN

MUSIC NOVA SCOTIA

Interviewees from all districts identified Music Nova Scotia as “one of the strongest” music industry associations in Canada.

Music Nova Scotia’s longstanding position can be attributed to the relative autonomy and vertical reach of the organization. Music Nova Scotia is recognized as the primary voice to advocate for the province’s commercial music industry.

The role of Music Nova Scotia as the primary investment source for musicians expanded in 2015 when the Province dissolved the Cultural Industries office and transferred its \$300,000 Emerging Music Business Program (EMBP) to the industry association, increasing the total number of direct program investment delivered to the sector via Music Nova Scotia to \$600,000. Between the Music Nova Scotia Investment Program and the new Creative industries fund (which services design, textiles, written works, and fine art among other creative industries), Scott Long, the organization’s executive director, says this represents an investment in the music industry in Nova Scotia at the same per capita level as Ontario.²²

Music Nova Scotia now adjudicates and administers the vast majority of provincial investment in the Nova Scotia music industry. This level of vertical integration and oversight – where one organization provides the voice of industry and access to training, investment funds, opportunities for career advancement, and industry recognition – is unparalleled in Atlantic Canada. Music Nova Scotia is able to employ several full-time staff (in addition to contract positions) and maintain a brick and mortar office with space and computers available for members.

In contrast, most other MIA’s in Atlantic Canada employ only an Executive Director and supplement with short-term contract positions, as funding allows, limiting their ability to deliver a comparative level of services. 🎵



NEON DREAMS / PHOTO BY JUSTIN ROY



JENN GRANT / PHOTO BY HL LOKER



VALUE GAP

“People that own streaming companies are making billions of dollars and people who are making the art—that there would be no streaming companies without—are being paid fractions of pennies. I think that is really something that needs to be addressed.” said, Albert Lionais of CBMIC. This problem is known as the value gap.

Frances Moore, CEO of the International Federation of Phonographic Industry (IFPI), describes this issue as an anomaly. “Music consumption is exploding worldwide,” she said in a May 2016 speech at Canadian Music Week, “but the revenues resulting from that consumption are not being returned fairly to those who create, own and invest in the music.”²³

GLOBAL CHANGES, LOCAL IMPACT

The East Coast is, of course, not immune to the effects of the changes in consumption and sources of revenue.

“Revenues in music continue to slide,” said Scott Long of Music Nova Scotia, “and physical recordings are basically becoming a thing of the past. Although we’re seeing explosive growth in paid streaming on a macro level and record labels are now reporting that streaming is their biggest revenue source, the compensation is still not making its way to independent artists.”

As the traditional revenue streams of the industry continue to be disrupted by changes in technology, it is critical for members of the music community and key stakeholders such as regulatory bodies and policy makers to work together to ensure artists and professionals in Atlantic Canada can build sustainable careers and that the live music industry, so critical to an artist’s success and ability to earn a living, is well-supported.

Industry experts are on the forefront of generating new revenue streams from music. Widespread adoption of flexible models will provide Atlantic artists the opportunity to monetize the creation and performance of music as the industry continues to transform.

EXPORT SUCCESS – MUSIC PEI

Music PEI has developed and invested in a targeted export strategy which provides matching investments to help Island musicians tour internationally, reach new audiences, and expand their markets. Exporting allows musicians to continue to live on the Island, with all the benefits of small-town life, while earning income from external sources.

Through this export program, Island artists are able to market live performances, merchandise, and recorded music to international audiences in countries across five continents all while bringing the revenues back home to Atlantic Canada and injecting new money into the economy. Since the Music PEI export program began the number of exporting or internationally touring artists has grown by 400%.²⁴

In addition to supporting PEI musicians to sell directly to new markets, the export program also brings international industry to PEI. Music talent buyers from around the world come to PEI to evaluate performances by export-ready artists. Much like a product demonstration at a trade show, these showcase performances are opportunities for festival programmers, clubs, theatres, and music venues to book Atlantic Canadian talent for their events. Prince Edward Island is home to fewer than 150,000 residents yet, in the past year alone, the efforts of Music PEI have brought in over \$2 million dollars of work for PEI artists.²⁵ 🎵



ANDREW WAITE & THE FIRM / PHOTO BY CHRISTINE ROENSPEISS



PAPER LIONS / PHOTO BY DAINE CUTCLIFFE

4 | REGIONAL ISSUES & OPPORTUNITIES

In this final chapter, and keeping in mind the region's assets, as well as demographic and global factors affecting music, we now examine the local issues and opportunities.

REGIONAL ISSUES

When looking at the entire region several overarching issues were identified:

- Incomplete comprehension of value of regional music industry;
- Music as a career lacking recognition;
- Outmigration of artists and professionals;
- Imminent deficits caused by cuts to program funding and music education;
- Underrepresented populations in industry and audiences;
- Gaps in collaboration across jurisdictions;
- Insufficient number of local industry professionals;
- Lack of succession strategy for industry professionals and arts administration;
- Declining number of music venues; and,
- Opportunities for investment in music businesses.

The availability of local industry expertise and existing resources within each district are strengths that can be built upon. An Atlantic Canada Music Strategy, along with an Atlantic Music Fund, built out of the knowledge, expertise, and resources provided through collaboration and cooperation between the Atlantic Music industry organizations, government, and the grassroots music community can provide the framework necessary to address regional gaps in infrastructure. A strategy and fund developed in coordination and cooperation with industry stakeholders would complement the essential resources delivered by the industry organizations of each of the five districts and expand the opportunities available within the music ecosystem in Atlantic Canada.

Crucially, an Atlantic Music Fund would need to be financed via new money, and would not draw on existing municipal, provincial or federal investment opportunities currently accessed by the Atlantic Canadian MIAs or related cultural industries. The introduction of an Atlantic Music Fund must also ensure that existing MIA investment, as well as funding accessed by creative industries and cultural organizations, is not prorated or decreased as a result of the introduction of a new investment strategy.

The following section lays out issues that were shared and opportunities that were identified by industry members across the region and point to the critical areas which can be addressed by an Atlantic Canada Music Strategy and an Atlantic Music Fund.



CITY NATIVES / PHOTO BY CHRISTINE ROENSPEISS

DEVELOPING REGIONAL CAPACITY

The region's diverse cultural foundation and music education programs raise high calibre artists with great potential for success. However, once musicians begin to navigate the complexities of the industry on their own, and try to catch the attention of local industry experts who can help, the gaps in the local music industry limit their ability to gain momentum. With approximately 80% of the Canadian music industry located in Toronto, Atlantic Canadian musicians are left with three choices: navigate the complexities of the industry on their own, hire or work with music professionals based outside of the region (since local professionals are often already working at capacity), or pack their bags and move their act to where the industry infrastructure is more robust.

Interviewees continually cited a lack of managers, music publishing companies, music supervisors, agents, production companies, and opportunities for collaboration with film, TV, and tech companies in the Atlantic region, in addition to the absence of major and indie recording label presence. Experienced managers in Atlantic Canada are operating at full capacity, and cannot meet the demand for their services.

"One of the challenges that we have, as an artist management/record label, is that the talent in Atlantic Canada is extraordinary. There are only so many artists that you can manage to take on and work with. So although the industry is larger than it was when I was getting going with Rawlins Cross, there is still a lot of need for growth. More artist managers, more labels, and there's a great need on the publishing side as well," said Ian McKinnon, of GroundSwell Music, one of the experienced artist managers that we interviewed.

The lack of industry infrastructure is a critical issue in Atlantic Canada. "There are other parts of Canada that are doing a really good job [of developing the music industry]. And I think what's going to happen is the talent

here are going to continue to leave. At some point, you won't have that base." Said ECMA Executive Director Andy McLean. "When an artist, or a performer, or a band—there's a juncture in their career where they have to make a decision, when they're at that point, when they've put in the 10,000 or 20,000 hours, and they're ready to make a serious commitment to this—it's going to be really hard to make a strong argument to commit to stay in Atlantic Canada. Because we won't have the conditions necessary to get them to the next stage they want to get to. And they're going to look elsewhere. And be drawn away. And we don't want that to happen. We need to create the conditions here where they can move to that next level. And bring back all the rewards, the benefits that they generate from their career back into Atlantic Canada."

NOWHERE TO GO BUT AWAY

As other Canadian jurisdictions create dedicated funds to support the recording of music, competition for

professional talent is increasing.

"Unfortunately, the playing field is not level anymore," says Louis Thomas, president of Sonic Entertainment Group, a large-scale production company, major

concert promoter and indie label based in Halifax. Thomas has seen this happen before: when the province of Nova Scotia created its own music industry incubation programs and became a maritime hub for the music industry.

Now, with the creation of music funds in both Ontario and British Columbia, Thomas predicts that "you're going to see musicians and industry work from those provinces to access funding and reduce costs. We need to be really aware and proactive about that." Atlantic Canada must work harder to recognize and retain these skills in the region. Thomas's prediction is already becoming the reality. In the few short months since this interview in the summer and publication in the spring, one of his management clients was granted \$40,000 from the province of BC to record his latest record there.

“Unfortunately, the playing field is not level anymore.”

— LOUIS THOMAS

DEVELOPING THE 'NEXT LEVEL' OF INDUSTRY INFRASTRUCTURE

There is no doubt that there are successful music industry professionals in Atlantic Canada (we interviewed many of them for this report). However, across all five districts, the majority of interviewees identified a significant problem in Atlantic Canada: music professionals (and artist managers in particular) which provide the skills and services required to sustain, develop, and advance a music career beyond the regional level are limited, at capacity, or entirely unavailable locally.

CEILING OF SUCCESS

Artists and musicians are dividing their time away from their core operations – creating and crafting music, in order to operate as their own managers, publicists, booking agents and digital marketing strategists. The domination of provincial industry investment in 'cost-effective' DIY-artist entrepreneurs, without providing support to develop locally based industry professionals to bring artists to the next level, has revealed the limitations of this models' potential.

A SOUND INVESTMENT

Music professionals accelerate the speed at which talented artists reach professional success. And they do so a lot more efficiently than most self-managed artists. For example, in financial terms, the average return on investments (ROI) on investments made by Music Nova Scotia in the careers of self-managed artists varied dramatically when compared to music professionals.

The average return on investment was substantially higher when placed in the hands of an industry professional. Industry professionals averaged an average ROI of 669%. Investment in individual artists and groups saw an average ROI of 137%.²⁶ It is important to underscore that investment in music at both the artist and the professional level resulted in strong financial returns. Importantly, these results support the call to increase the scale and capacity of music professionals in Atlantic Canada. Even artist-entrepreneurs earning robust ROI could benefit substantially from the availability of local skilled music professionals to take their businesses to the next level.

INVEST IN HUMAN INDUSTRY INFRASTRUCTURE

To address the lack of artist managers in Atlantic Canada, several interviewees suggested a similar solution: financial support to train and mentor new artist managers and reduce the barrier of the initial start-up costs. The incubation period (the time it takes an artist to develop a substantial economic draw) is measured in years, and during that time, artists and managers must play the long game. The prevailing model sees artist managers typically making a percentage of all the artists' revenues, before expenses, which for emerging artists, isn't typically enough to support a manager.

Kate Gracey-Stewart, an artist manager and owner of Lighthouse Entertainment based in PEI, provides context for financial support, "I consider the artist management part of my business to be my 'volunteer project' because I work with emerging artists and there is absolutely no money in it. It's impossible for anyone to make a career out of [solely artist management] unless they're working with an 'artist at a certain level.' But I feel passionate about working with artists that are emerging because they need that support more than anyone."

Music professionals need to be trained and mentored and given the opportunity to access start-up capital as they launch their own businesses. Sheri Jones, of Jones and Co., said, "This is a really labour intensive industry that we're in. You can never say, I have done everything I can do for that artist. There is always something else that you could be doing. You prioritize what you're actually going to do based on limited human resources and budget."

Jones continued, "If government could invest in industry infrastructure that would make a huge impact. If I had two more bodies on staff I'd be making a lot more progress with my artists nationally, and internationally. I could take on more artists and train those two bodies to become managers."

MULTI-TIERED GROWTH STRATEGY

Music professionals were clear, support for artists is essential, but in order to grow the industry in Atlantic Canada, “it’s important that

the upper-level sector of this industry is given enough opportunity and resources to succeed, which then helps develop and maintain the ecosystem,” said Louis Thomas of Sonic Entertainment Group. “You need to have various tiers of success. And I think that is what

“We need to start putting money back into building a stronger foundation for the artists. Because there are a lot of good artists out there that aren’t making it happen for themselves because they don’t have that [professional] support.”

— KATE GRACEY-STEWART

we can do here. Support the artists and industry that are successful and you will see other successes slowly surface.”

Kate Gracey-Stewart also raised the need for more opportunities to develop the professional skills in the region, saying, “We need to start putting money back into building a stronger foundation for the artists. Because there are a lot of good artists out there that aren’t making it happen for themselves because they don’t have that [professional] support.”



VISHTËN / PHOTO BY JACINTA BERNARD

THE PHYSICAL INFRASTRUCTURE DEFICIT

CHALLENGING ROOM ACOUSTICS

Many rooms that go on to become venues, especially small and grassroots ones, are frequently chosen because of availability, and affordability. Commercial and retail space, including converted buildings such as warehouses, churches, and houses, particularly in Atlantic Canada where properties may be well over a hundred years old, are rarely built with the expectation that a listening room will fill the walls. It's no surprise that the acoustic quality of venues frequently presents ongoing challenges.

A room with unfortunate acoustics can make even the most talented band sound awful. The most affordable way to ameliorate a room's poor acoustics is to have high-quality sound equipment, paired with a highly skilled professional sound technician or audio engineer running the sound board. Their skills can make a profound difference in the audience experience with the bands. However, not every room, even with the best sound tech in the world, can sound incredible with technical equipment alone.

AUDIENCES AT RISK

Rooms may require significant investment to renovate the spaces to increase sound quality. "There are few small to medium sized venues left in Atlantic Canada that sound good. That to me is a scary place to be. We must do more to generate better spaces for performance through renovations with a focus on increasing fidelity, upgrades to equipment and training and mentoring for techs," said Albert Lionais, who also works as a sound tech. He went on to say that when he attends shows as an audience member the quality of the acoustics has significantly impacted his enjoyment of the performance, in his words, "great bands sound shitty in bad rooms. In recent years, I find myself leaving clubs more regularly because the bands sound awful in that room, not because the bands aren't amazing."

OUTDATED AND OUT OF REACH

Music venues in the region are in between a rock and a hard place. Venues need to maintain a strong reputation with the bands that perform inside their doors, as much as with the local audiences. Investing in renovations, which may temporarily close their doors, comes with additional risk from loss of revenue and may be difficult to leverage. Additionally, many small and medium sized capacity venues across Atlantic Canada are not only faced with structural challenges, many venues and performance spaces are using equipment that is reaching the end of its life, substandard, or out of date.

FOCUS ON SOUND FIDELITY

The Trailside Inn, a restaurant and listening room in rural PEI has an audience capacity of 70 patrons and is open when demand is highest – during the tourist season. Pat Deighan, who is the co-owner of the venue as well as a music retail store in Charlottetown, spoke of the challenges accessing capital to grow his businesses. "For a small business, for what I'm doing," said Deighan, "there's just no money to access. We would love to access some of the money [invested in provincial and federal programs] to be able to upgrade our PA system. That would be great for us. To have good sound would definitely help out any venue to stay competitive."

As a venue operator, his business doesn't qualify for existing music industry-specific investment programs. Deighan provides the space to host the events, but the essential role that the venue occupies in the local music ecosystem isn't protected in the existing programs, even while venue operators strive to meet the needs and expectations of professional musicians as much as the expectations of the audience they attract. "Some artists come through and they do comment on the sound. You don't want a performer to leave, not having enjoyed their experience at the Trailside, because they're working with subpar equipment sometimes. An upgraded sound system makes performing here more professional," said Deighan.

RECORDING AND MASTERING STUDIOS

Several musicians discussed the difficulty of maintaining a mid and high-level music career while relying on the existing infrastructure available within their home province. Without high-level professional recording and mastering studios available locally, professional musicians (and their larger recording budgets) must record elsewhere. “As far as recording infrastructure in PEI, the studios that are there, are not of an international level,” says musician Catherine MacLellan. “They’re not good enough to record something that is going to get you on the international stage so a lot of musicians are going to Nashville, Georgia, or Toronto.” For artists, this means they must budget for additional travel, accommodation, and living expenses.

Funding programs in other provinces, such as the Ontario Music Fund, are also factoring into decisions about recording. Amelia Curran, who was recording in Ontario at the time of our interview, laments the revenue that could have been re-invested in the music industry in Atlantic Canada. “I’m in Toronto right now because I just made a record,” said Curran.

“Very simply, recording this album represents about \$70,000, spread out over six independently owned and operated small businesses in that community—these are all small businesses, skills-based businesses, with mixing engineers and hired assistant engineers. And it all goes back [to the local music economy]. I just spent all this money in Ontario because Ontario invested in me. And there is no infrastructure like that in Newfoundland and Labrador to invest, on a production level, for artists.”

Curran and MacLellan both encourage governments to invest in high-quality recording and mastering studios and skilled engineers, so that more artists can stay in the Atlantic region to record, and so that those studios can attract other recording projects to the area.



LES HÔTESSES D'HILAIRE / PHOTO BY PAM SAMSON



KILMORE / PHOTO BY HL LOKER

FOCUS ON INCLUSION

LINGUISTIC DIVERSITY

As a bilingual province, music organizations in New Brunswick have to face the challenges presented by a multifaceted linguistic and cultural environment. “There is a disconnect between both industries, Anglophone and Francophone, much like [the relationship] with the rest of the region – and it’s something that I have been trying to develop and trying to find time to analyze,” said Jean Surette, executive director of Music NB. “There are still two solitudes, where things happen kind of separately. You can take the province and cut it in half diagonally, from west to east, north to south and the whole up-side is mostly Francophone and the rest is English. And so the touring will happen in the south but you won’t get a lot of artists going up north – and vice versa. That’s a challenge, an interesting challenge, to try to develop ties within those communities.”

INDUSTRY DIVERSITY

While the majority of the people we interviewed described the sector as collaborative, some were able to identify barriers which continue to reduce the participation of some groups, such as women, the LGBTQ* community, cultural or linguistic minorities, and people of colour. Several interviewees spoke of the importance of informal mentors and role models and the integral support they provide during the development and advancement of their careers.

For many artists, getting a foot into the door, and a gig, was a result of a more-established member of the music community providing opportunities to perform (such as a friend, or a local concert promoter). For some, mentors and role models are highly visible and accessible through existing networks and formal music training opportunities, such as those put on by the MIAs. For others, there are barriers to entering and remaining, in the music industry. Joanna Barker, co-founder of St. John’s Women in Music (SWIM) a grassroots organization aimed to reduce the barriers experienced by women in the local music scene,

and program director at Girls Rock NL, spoke of the need for industry resources that meet the needs of specific groups, in this instance, women and girls, saying, “The truth of the matter is, that far fewer women participate in the industry. There are far fewer women represented in the music industry and that comes down to the existing barriers. Some will make it through—like I did. But there are less of us. So why? And what we are coming to terms with is that the music industry is set up for boys, for men, from childhood onward. So whether it’s Girls Rock [which organizes music camps for girls], or SWIM, we’re changing that conversation in St. John’s. Which is awesome. I think it’s about time. But we still have our work cut out for us. There is still a lot to be done.”

Similar barriers to access existing resources exist in many communities. A collaborative approach is needed to identify and quantify the barriers to entry, advancement, and retention among underrepresented groups, address gaps in resource allocation, and ensure that the industry in Atlantic Canada is diverse and inclusive of all the talent in the region. 🎵



OPPORTUNITY FOR REGIONAL APPROACH

A co-ordinated Atlantic Canadian music strategy could build on opportunities to increase human and physical infrastructure at each level of the industry and ensure that artists in Atlantic Canada can compete on the global stage.

COMING TOGETHER WITH A UNIFIED VOICE

“One of the ongoing problems that we see is that, as a region, we [the pan-Atlantic music industry] come together once a year at ECMA and see who is doing what. But for the rest of the time, what’s going on in each jurisdiction – we’re all in our own little worlds.” Said Jean Surette, of Music NB. “It’s better than it was, but it’s still something we need to work on.”

Leaders among the MIAs have all stated the importance of communicating and collaborating as a region and are open to the benefits that may come from a regional strategy.

For instance, when asked what the music industry can do to strengthen the sector, Rob Oakie, executive director of Music PEI said, “We have had success collaborating with our regional partners in the past and it is something we could do more of. The most important collaboration right now is to create sustainable funding for the region. That’s one of the biggest goals. But also collaborating on projects, particularly export and infrastructure development. Music PEI has been a strong advocate of that for the last few years.”

“Certainly in the last two years, and probably the year before I came [in 2014], there was the beginning of the re-emergence of this idea that ‘we’re stronger together.’ That’s the role we’re on now. I speak to each of the Executive Directors regularly.” said, Andy McLean, of the ECMA. “That process has come full circle. Everybody wants to work collectively, but at the same time, still do their own thing. And that’s the way it works out west as well. They don’t do everything together, all the time.”

The communication, and collaboration among the Atlantic districts continues to improve. For the first time since 2009, Music NB, Music Nova Scotia, Music PEI, MusicNL and the ECMA partnered together as an East Coast collective to present the “Canadian Music. East Coast Style Spotlight” at the 29th annual Folk Alliance International (FAI) conference in Kansas City, Missouri.²⁷ The positive feedback emerging from this coordinated effort offers promising insight to the potential benefits of an Atlantic Canadian music strategy. Shelley Nordstrom, export manager for the ECMA, said, “This partnered business development initiative was a great success – probably the best in the last 15 years.”²⁸

A coordinated effort, bringing together the Atlantic Canadian MIAs, the ECMA, and provincial governments to develop a regional strategy would ensure the protection of existing programs which

are essential to the foundation of the industry. Working as a regional collaborative allows industry expertise from across the region to develop a shared strategy with programs and additional funding that complement available resources and addresses the gaps. The combination of expertise and community support would build upon the strengths of the music industry in Atlantic Canada while safeguarding essential infrastructure.

INVESTMENTS IN-TUNE

Recently, the Atlantic Canada Opportunities Agency (ACOA) announced a \$175,000 repayable contribution to Charlottetown-based business Kaneshii Vinyl Press Ltd. to set up a new vinyl manufacturing plant in PEI. A co-ordinated music strategy for the region could ensure that, like this example, continued investment in music industry infrastructure can address the gaps in industry infrastructure in Atlantic Canada.

“ We have had success collaborating with our regional partners in the past and it is something we could do more of. The most important collaboration right now is to create sustainable funding for the region. That’s one of the biggest goals. ”

– ROB OAKIE

A LIMITING POLICY FRAMEWORK

As it stands, each organization tasked with administering provincial investment programs has distinct and inward-facing policies and programs, which may unintentionally limit the growth of the sector. For example, in order to maximize the “eligible expenses,” provincial investment programs typically require musicians to work with businesses that are located within the originating province. While this makes sense politically, it limits the overall competitiveness of the Atlantic music industry.

Atlantic Canadian provinces have varying levels of infrastructure, and within a single province the available opportunities can be limiting, especially for musicians who are climbing the ladder of success. This contributes to an operational environment that encourages musicians and music businesses to uproot and operate elsewhere, where investment programs and the necessary music industry infrastructure exist, in order to produce work that is of the highest possible quality and make a living while doing so.

To address the potentially serious, but unintended consequences, of some program policies, existing and future investment programs should be encouraged to consider flexibility in assessing investment opportunities to acknowledge the reality of the regionally based businesses under their purview. This would allow for businesses to engage regionally-based organizations as necessary, without fear of loss of funding. Musicians and music businesses could be incentivised to choose to invest in Atlantic Canada as part of a broader strategy to retain and grow the industry locally.

ROBUST INFRASTRUCTURE FROM REGIONAL INCENTIVES

It is important to recognize that across the region the infrastructure deficit is high. Building up the industry through training and investment will necessarily be an incremental process. To minimize the ongoing impact of existing infrastructure shortages within each district, musicians and music businesses within each region should be provided incentives through policy to utilize existing infrastructure in neighbouring districts over the competing infrastructure outside of the Atlantic Region.

Rob Oakie spoke about the result of government investment in Music PEI, saying “It used to be the case that we had an out-migration of our best artists, but we’ve seen that turn around since Music PEI started in 2008, certainly. But a reduction in funding is always a threat – especially when you’ve got other jurisdictions that are supporting artists more.”

Locally Available Industry is Essential

Interviewees recognized and celebrated the substantial benefits of interacting with local MIA’s. The professional development, mentorship, education and networking opportunities provided by industry events and conferences were applauded by the musicians and music professionals we interviewed.

Bringing the movers-and-shakers of the broader music industry directly to artists in Atlantic Canada was recognized as efficient, cost-effective, and essential in generating lucrative and career-advancing opportunities for Atlantic Canadian artists.

While interviewees stated that flexibility in investment program policies would remove a barrier to growth, they were very reluctant to support any suggestion which might remove locally-based opportunities from any part of the region – especially in the name of a short-term cost-efficient option. Interviewees, from every district, were fearful that any cuts to existing services would never again be re-invested into the music industry, and they would lose the only locally-based industry infrastructure that they have. Protecting the existing infrastructure is of primary concern in each district. An approach which protects existing infrastructure and funding programs and creates a regionally sustaining music sector is crucial.

CREATING A ROBUST REGIONAL INDUSTRY

In Atlantic Canada, MIA's and their provincial funders can make the deliberate choice to recognize their neighbours as partners in a regional music sector, rather than competition. If the MIA's agree to revise investment programs and policies detailing eligible expenses to take a regional approach, these policies have the ability to staunch the outflow of talent and funds outside of the region while simultaneously supporting a growth mindset in Atlantic Canada. The benefits to the region could be profound. For example, a band from New Brunswick releasing an album on vinyl cannot have those records manufactured in New Brunswick, the manufacturing facility simply does not exist. The closest operational vinyl pressing facility is in Ontario or the US. However, once the recently announced Kaneshii Vinyl Press in Charlottetown, PEI is operational bands will have a choice between an Ontario-based manufacturer (and potential access to OMF funding to attract their investment), a foreign manufacturer, or one located in PEI. Due to the incentives in Ontario and BC, where the industry infrastructure and funding is more robust, the Atlantic Canadian music sector must compete as a region and create incentives to reinvest in Atlantic Canada which, in turn, supports the development of robust industry infrastructure of its own.

A regional approach could have a myriad of benefits to all sectors of the industry, not simply manufacturing. Under policies which support a regional approach, an experienced manager based in Nova Scotia (who may also be providing training for interns enrolled in the NSCC Music Business program), can compete on the same level with managers from Ontario when looking to work with a band from Newfoundland. This approach can see changes which incentivise artists from New Brunswick to have their records recorded locally, and sent on to be mastered in Nova Scotia rather than BC or LA. These small changes can promote the sustainability and growth of the music sector in Atlantic Canada for years to come.

A STABLE FINANCIAL FUTURE

The following recommendations outline ways governments could demonstrate a renewed understanding of and commitment to developing and expanding upon the economic and social contributions of the Atlantic Canadian music industry. Targeted investment in the music industry will expand opportunities for professional skill development, improve the capacity of existing industry, and develop an environment in which young people are drawn to, and incentivised to stay, in Atlantic Canada.



THE MOTORLEAGE / PHOTO BY MANON CORMIER

RECOMMENDATIONS

- Develop an Atlantic Canada Music Strategy and an Atlantic Music Fund, in coordination and collaboration with music industry organizations, government stakeholders and other related organizations to complement existing programs, increase investment, and develop and incentivize musicians and music related businesses to reinvest in Atlantic Canada;
- Atlantic Canadian Governments should adopt a region-wide lens for policy-making relating to the full breadth of the music industry, supported by full and consistent input and direction from all MIAs. Region-wide policy recommendations would require unanimous support and feedback from all MIAs;
- Music industry organizations, Atlantic Canadian governments, and other related associations in Atlantic Canada should be encouraged to increase collaboration and communication across jurisdictions;
- Atlantic Canadian Funding organizations should expand opportunities for applicants to apply for funding as a collective in support of large-scale projects focused on increasing industry capacity;
- Encourage flexible and balanced provincial and MIA funding criteria which, when appropriate, allow successful applicants to claim work with musicians, music professionals, and music businesses based in any of the Atlantic provinces as ‘eligible expenses;’
- Atlantic Canadian governments, in collaboration with industry, should develop a strategy to attract, train, and retain music professionals in Atlantic Canada. A strategy could include dedicated resources to close the training gap and meet the current and future demand for industry-related services within Atlantic Canada;
- Atlantic Canadian governments, in collaboration with industry, should develop a strategy to address the physical music industry infrastructure deficit. A strategy could include resources to upgrade sound equipment and address room acoustics through redesign or renovations;
- Atlantic Canadian governments, in collaboration with industry, should develop and designate delivery of a pan-Atlantic business incubation program for artist managers. Program should include: mentorship with an experienced manager, in-class training, partnerships with working artists, a financial stipend for (eg.) a minimum of one year.



CBMIC'S COLOURFUL COLLABORATION

A prime example of the collaborative and innovative strategies used by the MIAs to develop economic opportunities for their members comes from CBMIC. Each year, the music co-operative capitalizes on the internationally acclaimed annual Celtic Colours International Festival held in Cape Breton and organizes a presenters and media incoming buyers program that coincides with the festival.

The addition of the incoming buyers program to the festival program offers a win-win-win situation for the showcasing artists, audiences, and the organizations. In 2016, this genre-specific program brought in delegates from Canada, the US, Belgium, Australia, Scotland, Ireland, Austria and Sweden on a total budget of \$67,000. In the five months since the event, the preliminary results are impressive. Confirmed bookings for Cape Breton artists have totaled over \$90,000 with an additional potential spend of \$147,000 confirmed by delegates.²⁹ The economic benefits of this industry showcase extend out into the local economy. International delegates reported spending a total of \$24, 660 of their own money while in Cape Breton. These figures are separate from, and in addition to, the \$13.2 million of direct dollars spent by music tourists and audiences attending the Cape Breton festival in 2016. 🎵



ASHLEY MACISAAC / PHOTO BY HL LOKER



HEATHER RANKIN / PHOTO BY HL LOKER



VOGUE DOTS / PHOTO BY ALLISON MYGGLAND

ATTRACT AND RETAIN YOUTH BY INVESTING IN THE MUSIC INDUSTRY

While the music sector is negatively affected by the outmigration of youth, and additionally challenged by the issues discussed above, music may also be part of the solution.

“One of the strengths of the Atlantic Region is that [the music industry is] an industry that keeps youth in the area,” says Jennifer Currie, board chair of the Cape Breton Music Industry Cooperative, “That is a strength for any community. The more young people that we can keep here, the better it is for the community.”

Research from Music Canada’s *The Mastering of a Music City* report has found that one of the key benefits of a vibrant music sector is the attraction and retention of young, skilled workers. An active live music scene in a city, or region, can be a key factor for young professionals deciding where they want to live, develop their careers, and put down roots.

MUSIC VENUES AS INNOVATION HUBS

Venues are one type of social space which provides an essential opportunity for youth to create meaningful connections to the larger community and culture. More than just a business venture, live venues are incubators

for musical creativity and experimentation, cultural innovation, and hubs of entrepreneurship. They play a social role in the community and are spaces which cultivate reputations which draw audiences both locally and internationally. Venues play a key and critical role in the development of many artist’s careers, and they thrive when they are able to attract and retain youthful audiences who then go on to invest in the social and economic fabric of their communities.

Darren Gallop, of Marcato Digital Solutions, agrees, “You can’t have ten tech companies hiring people and not have a cool venue for them to see and experience live music, or a cool coffee shop downtown, or a cool hub, or a local bar. It all spins together.”

A VALUABLE ECONOMIC CONTRIBUTOR

The music industry in Atlantic Canada is an undervalued economic contributor. With targeted intervention and a collaborative regional approach, the music industry offers immense potential as a source of job creation, economic diversification, and growth.

There are significant economic opportunities to be leveraged within the region – the Atlantic Provinces have direct access to each other, as well as ground access to neighbouring markets in Quebec, Maine, and the other New England states. Improved co-ordination between these music markets has the potential to improve revenue generation in all markets.

PERCEPTIONS OF THE VALUE OF MUSIC

Despite the recognition of music as an essential part of the culture and identity of Atlantic Canadians, there is a perception that became evident in the interviews for this report that government policy makers have not recognized the true potential economic value and weight of music.

“Sometimes I try to explain to people the economic impact writing one song – for example if you think about Allister MacGillivray and Song for the Mira, how do you calculate how that song has affected people? How many people has it affected all over the world? How many people, after hearing that song, got more interested in the area? Or the music? How many people decided that they wanted to come here and experience it for real? You know, every time that a songwriter performs, they are ambassadors on a whole bunch of different levels.” Said Fred Lavery, a music producer and co-owner of Lakewind Sound Studios in Cape Breton. “If we encourage that, if we nurture that, that’s how I think we grow the industry in a really healthy and positive way.”

Music in the Atlantic region is supported by provincial and federal government investment based on both a cultural and, to a lesser extent, business argument. However, the preference for categorizing music as a primarily artistic endeavor has had the unintended effect of limiting the economic opportunities for musicians and music professionals.

LEFT IN LIMBO

Musicians and music businesses are frequently ineligible for business loans and are referred to cultural granting programs rather than corporate programs. Live music businesses can be stymied by prohibitive regulatory frameworks. Artists, musicians are typically unable to pay into or collect, employment insurance during economic downturns, and there is limited access to supplementary pension plans, making it difficult for musicians to ensure financial security for the future.

MUSIC AS AN OCCUPATION

Lucy Niles, one of two fronting musicians for the punk band, Partner said, “I think in general trying to make music as a living is pretty difficult, compared to other trades and vocations. If you’re trying to make music, people just expect you to not make money, and mooch rent, and be paid by the fact that you’re having fun.”

Whether it is out of necessity or preference, many artists in Atlantic Canada are artist-entrepreneurs.³⁰ These individuals take on multiple roles, creating, recording, and performing their music while at the same time marketing, promoting, and managing the business side of their work.

Unsurprisingly, these hardworking artist-entrepreneurs aren’t compensated for the additional effort. Many interviewees talked about the need to take on additional employment in order to earn a livable income.

“Artists spend a lot of their time trying to do other things to make enough money so that they can do their art – whether it’s driving a cab or waitressing,” said Lee Bolton, executive director of the Imperial Theatre.



VALUE OF ARTIST ENTREPRENEURS

Artists should be considered entrepreneurs by government and other funding agencies. In many cases, they operate small businesses in which they assume risk, employ other professionals and invest in training, research, and development. Their artist name or band name is their brand and it requires marketing and protection, not unlike other products or services. Juno award winning singer-songwriter Amelia Curran illustrates this in her description of life as an artist entrepreneur:

“It’s a job like any other job. You are your own business, so you’re taking all of the risks of being an artist – on top of taking all of the risks of running your own business. There are certain risks that a label will take, like printing records and distributing the records – and they’ll take those risks with me.

But when it comes down to it, I have to pay for this thing. In my case, everyone I work with has a contract with me, and not with my label, including the studio I just worked in and my bandmates when we go on the road.

I pay them so much per show, per rehearsal, per travel day, per diem. I pay for their accommodations and I pay for their travel. And in return they’re awesome! And really, really, skilled musicians. But these are non-negotiable expenses. So oftentimes I will lose money on a show. For my bandmates this is their job. But for me? I’m the business. I take the risk. I’m investing time, money, and energy – everything I’ve got – into just that one hour a day we get to play music in front of people.”

UNDERSTANDING THE MUSIC INDUSTRY

Several interviewees expressed concern with the way industry events were often misconstrued by the government.

For example, a showcase is an industry event where professional musicians vie for a coveted opportunity to perform in front of a curated group of music professionals (known as delegates) who hire artists to perform at venues, events, and festivals, and/or place music in television, movies, and other media. A showcase performance can lead to numerous, and lucrative, opportunities for a musician or band. However, even when a grant for a specific showcase program is provided, there can be confusion as to the value of these events, and what, ultimately, they are for.

“Here’s the money for your party.” That is what Jennifer Currie of CBMIC was told after receiving funding from one of their partners for a Cape Breton artist showcase during the East Coast Music Awards. “Yes, there is going to be enjoyment in the audience—which is why people go and see music,” said Currie. “But we were putting on this showcase so that our artists could further their careers.”

In Atlantic Canada, MIAs and the ECMA regularly organize showcases which bring buyers from the global music market to listen to East Coast musicians. Existing investment programs are used to enable Atlantic Canadian musicians to perform at industry events.

Other interviewees indicated that in their experience music is often perceived as a frivolous expense rather than recognized as a social and economic investment. As an example, more often than not-for-profit concert promoters and companies have no pre-existing relationships with government investment or funding programs despite their critical importance to the music ecology as a whole.

Currie’s example highlights the importance of developing better communication between the industry and government is a critical opportunity. Some progress has already been made. Following discussions with provincial officials from New Brunswick, Andy McLean, executive director of the ECMA, noticed a positive change:

once government officials gained an understanding of the functions of showcases, and attracting delegates from other markets, they approved a previously denied request to fund an artist to attend an industry showcase.

RECOMMENDATIONS

Provincial governments in Atlantic Canada should:

- Revise the criteria for small business/entrepreneurial programs and grants to ensure music industry businesses, including live music businesses, and artist-entrepreneurs are made eligible;
- In partnership with local government and industry, build and maintain a healthy live music ecology across Atlantic Canada through the implementation of best practices in policy, tax and regulatory practises from around the world;
- Ensure Federal and Provincial wage subsidy programs, such as the Canada Job Grant and Youth Employment Grant, as well as provincial employment programs, include private music businesses and non-profits are eligible for subsidies to hire students, unemployed, and underemployed persons.



ROSE COUSINS / PHOTO BY PAM SAMPSON

EXPORT SUCCESS – ECMA

The ECMA Export Buyers Program is renowned as one of Canada’s premiere incoming buyers trade events and creates export business development opportunities for the Atlantic Canadian music industry.

When it was launched 15 years ago the ‘Export Buyers Program’ brought in 13 international delegates. The program has gained a reputation as, “a leading ‘business to business’ marketplace with over 75 international and Canadian delegates.” says Shelley Nordstrom, export manager for the East Coast Music Association. The program delivers millions of dollars in annual revenue for East Coast artists and companies and provides a platform for Atlantic artists to build long-term relationships with international and Canadian booking agents, presenters, festival representatives, promoters, film and music placement supervisors, digital experts, and media, substantially raising the profile of Atlantic Canada on the global world stage while cultivating solid export opportunities for Atlantic Canadian artists. 🎵



ADAM BALDWIN / PHOTO BY JUSTIN ROY



HEY ROSETTA! / PHOTO BY HL LOKER

MUSIC EDUCATION

Music education is an essential component of the music ecosystem in Atlantic Canada. As stated in the opening section of this report, music education has provided a foundation upon which the abundance of talent in the region has emerged. “Education is about teaching people to be lifelong learners and to be interested in the world around them. To be problem solvers so that they can make the world a better place.” says, Kirsten MacLaine, president of the Canadian Music Educators Association. While music education is recognized as a valued and essential part of the musical culture of the East Coast, music education across the region continues to be assailed by budget freezes, staff shortages, and budget cuts which have resulted in outdated curriculum, lack of technology, and instruments and technology in need of repair or replacement.

“As educators, we can’t honestly say that we know what it is that kids need to understand in another 20 years. Technology, the world itself, is changing so rapidly. When you talk about curriculum, it’s really hard to write a curriculum that can predict what the content is that people need to know. But to me, curriculum isn’t about content,” said MacLaine. “Curriculum is about setting standards to provide opportunities for kids to develop as human beings – and that’s something that music provides. So when you cut a program like music, you cut that opportunity for so many kids.”

The challenge may be daunting, but what is at stake is the future of youth in Atlantic Canada. Music offers kids and youth the medium to get involved with the larger community. And the musicians and music professionals that were interviewed for this report were eager to share their skills and provide opportunities to the youth. Atlantic Canada continues to lose young people to outmigration at a disproportionate rate. Ministries of Education have an opportunity to collaborate with the music industry associations to create opportunities within education programs to provide youth with training and mentorship opportunities to develop the skillsets necessary to pivot their music education into a career in the industry. Youth could be trained to become sound technicians,

lighting techs, business managers, and could do so while under the mentorship of local musicians and music professionals. Programs such as these would provide training for skills which are badly needed in the region, and have the advantage of fostering connections with the local community.

Musicians and industry professionals that we spoke to were interested in offering their time and expertise to collaborate and create programs and offer supplementary educational opportunities. However many barriers prevent this from happening. Some are budgetary, while others are logistical or a result of policy. It is clear that the Atlantic music community is willing to engage with the appropriate administration in order to find a solution which protects the future of music education, and injects into the curriculum innovative opportunities that will allow youth to develop life-long opportunities and within the music sector and the broader community.

RECOMMENDATIONS

- Each provincial Ministry of Education should identify gaps in music education at the primary, secondary, and post-secondary level;
- Each provincial Ministry of Education should then form a collaborative task force to address gaps and increase access to quality music education. This should include music educators, music industry professionals, artists, current students and recent graduates;
- Industry Associations should partner with provincial Ministries of Education to provide youth with various experiential learning opportunities in the music industry.

MUSIC CITIES FRAMEWORK

The Music Cities phenomenon has been growing ever since the release of Music Canada’s The Mastering of a Music City report in 2015. Designed as a roadmap, it chronicles best practices from around the world of Music Cities—which are defined as “communities of various sizes that have a vibrant music economy which they actively promote.” Communities of any size can become “music cities” because the core of the framework is about nurturing a vibrant music sector with supportive policies. It’s about recognizing the value of music, both culturally and economically, and supporting its growth.

The benefits of promoting the music economy are many, ranging from job creation to economic growth, tourism development, and artistic growth. According to the report, “a strong music community has also been proven to attract other industrial investment, along with talented young workers who put a high value on quality of life, no matter their profession.”³¹

EMBRACING THE BENEFITS OF THE NIGHTTIME ECONOMY

Municipal decision-makers are increasingly recognizing the value of nighttime activity to the economy and culture of cities. At the heart of any thriving night-time economy are live music venues. A 2015 London, UK, report found over \$100 billion in economic activity is generated by the nighttime economy and that music events and festivals attracted over 6.6 million people to the city.³² Municipal governments are increasingly hiring ‘night mayors’ to focus on the oft-dismissed social and economic role of night-time activities and use of space. Smaller cities and municipalities can benefit from these examples and leverage local nighttime economies to boost municipal culture and tourism.

Building on the diversity that exists on the East Coast – the variety of sounds and music scenes from Corner Brook to Halifax to Moncton – the Music City roadmap outlines several recommendations applicable to Atlantic Canada, including:

- Identifying and reducing barriers to music sector growth;
- Recognizing and embracing the benefits of a vibrant nighttime economy and the critical role played by live music venues;
- Fostering artistic growth by supporting the creation of arts districts;
- Establishing music offices/officers as a knowledgeable point of contact within government;
- Repurposing underutilized municipally owned spaces, or empty commercial spaces, as music hubs and rehearsal spaces for artists.

“You want to see cities embrace themselves as a Music City,” said James Boyle, executive director of the Halifax Pop Explosion Festival. “It’s about recognizing the strengths of the community, instead of fighting against it. I think Halifax is a great example of a city that has a lot of potential, but is not reaching that potential—because of that mindset problem.”

In order to unlock the economic and cultural potential of the evening economy, it is essential to recognize that it exists. Government can solve part of this problem simply by acknowledging the potential of the economic activity, and by considering the music community, and the evening economy as a whole when decisions are taken.

REDUCING BARRIERS TO MUSIC SECTOR GROWTH

Atlantic Canadian municipalities should actively seek out music- and musician-friendly policies—these are policies that support the growth and development of music businesses, such as live music venues, record labels, recording studios, and music promoters, and which help create a sustainable environment for musicians and artists.

ARTS DISTRICTS, HUBS, AND REHEARSAL SPACE

“The city’s role is exactly in ‘space;” said musician Amelia Curran. During her interview for this report, Curran pointed out an important opportunity for the city of St. Johns, NL where churches and parish halls are closing. “Why don’t we take those?” she asked. “The municipality could invest in this space, rather than letting it be sold to a developer.”

Erin Barnhardt, programming manager with the Arts and Culture Centres in Newfoundland and Labrador, sees the demand for additional space for the music community: “We have six rehearsal spaces in our building in St. John’s and they are booked solid seven days a week. There’s more demand than there is supply. More designated spaces for creation along with resources to support this work would be wonderful.”

Underutilized spaces like empty parishes, warehouses, and other surplus space could be transformed into multi-use cultural spaces used by artists and performers to rehearse and hone their craft – injecting new purpose into outmoded buildings. Re-zoning under-utilized industrial or commercial areas as creative hubs have been shown to revitalize under-developed areas while providing the physical space needed for music communities to grow and prosper.³³

EVENING TRANSPORTATION

In many places, night-time transportation is a complex issue. Frequent, predictable, and convenient public transit is critical in promoting safe and vibrant night-time economic activities. Citizens and tourists need to have multiple transportation choices available to them to be able to get home safely—at all hours. For example, when transit routes and frequencies are in development or under review, municipalities ought to work in partnership with members of the local evening economy in order to identify, and then provide a level of service that is equitable, given local circumstances and growth strategies.

OPEN FOR BUSINESS

Municipalities of all sizes can benefit from tailoring policies and bylaws to remove barriers for the local music community. Mike Campbell, owner of the award winning music venue, The Carleton, in Halifax, looks to cities like

Austin and Toronto and sees events that activate the city 24 hours a day: “When those festivals happen, you can wander from showcase club, to showcase club. You can get from point A to point B, and if you want to take the night further in those cities, the venue can apply for a license and stay open until 4 AM.”

Some Canadian cities already allow live music events or bars to apply for special licensing to stay open and serve alcohol later. Toronto does this during major events like NXNE, TIFF, and Canadian Music Week. While hosting the CCMA’s in 2016, London, Ontario’s city council passed a special resolution that allowed bars to stay open later during the event. Music communities in other parts of the country are pro-actively engaged with their own municipalities to address key issues and concerns, working to ensure they can continue to thrive as the foundation of any night-time economy. These examples offer insight to the possible tools available to be tailored to specific places and events.

RECOMMENDATIONS

Municipalities in Atlantic Canada should:

- Designate a single point of contact between the music industry and government. For larger municipalities, this may be a stand-alone music officer, and for smaller municipalities this role can be defined within an existing portfolio;
- Review municipal policies across departments, working with industry stakeholders to identify challenges and opportunities. Examples include land-use planning, transportation plans, by-laws, and economic, recreational and cultural planning strategies;
- Convene a music working group, including representatives from industry and government to draft and implement a municipal music strategy.

LIVE MUSIC AND AUDIENCES OF ALL AGES

LIVE MUSIC AT THE COMMUNITY LEVEL

The most significant weaknesses identified at the local level of the Atlantic Canadian music sector included a lack of local music venues of diverse capacities and insufficient rehearsal spaces. There are a number of tools that municipalities have at their disposal in order to address these issues, protect key spaces, and to encourage growth and sustainability of the local music community.

According to *The Mastering of a Music City*, there are several policy levers that municipal governments can use, separately or together. These are:

- Venue and event licensing;
- Parking and transportation bylaws;
- Noise bylaws;
- Land-use planning; and,
- Tax treatment⁴²

The first step is identifying which combination of these regulations is acting as a barrier to music sector growth in the community.

In Halifax, for example, burdensome regulation has been cited as a barrier to live music events. Music organizers must navigate a complicated approval process which involves multiple city departments (in addition to police and fire departments) before they can get the “O.K.” for an event. On top of that, the costs of enforcing the regulations—such as paying for paid-duty police officers in addition to private event security—can be prohibitive.

“There should be a roadmap to putting on an event. It shouldn’t require multiple meetings – you should just fill out a form and off you go!” says Boyle of Halifax Pop Explosion. “It’s amazing when cities do that, because suddenly the little things that are sort of intangible, change—suddenly more happens because there are fewer barriers.”

EMPOWERING MUSIC OFFICERS

One solution to streamline the interactions between industry and government begins by recognizing that significant resources are currently allocated to any number of administrators who could address these situations differently. Designating a music office within an existing department, or training an administrator as a music officer, empowers administration to communicate effectively with all parties and work with the music community to identify barriers and find solutions. Speaking of the potential effect of a provincially appointed music office or officer, Laurie Gillis, executive director of the Atlantic Presenters Association said, “having someone in an office, who knows the music industry and knows the policies and regulations, would be massive.” Gillis continued, “If you have a strong music officer that expertise would filter up in the chain of command.”

Industry professionals in the non-profit sphere, like Gillis, and professionals in the private sector like Louis Thomas of Sonic Entertainment, articulated the positive effect that a local music officer could have. Thomas conceptualized the music officer on a municipal level, saying that “a municipal music officer would be very useful. A person empowered to be a conduit between senior staff, council and this industry – with a common goal of making a Music City, this would be hugely helpful.”

PROTECT EXISTING MUSIC VENUES

Live music is the life force which sustains a music community. Music venues, and grassroots music venues are places where people gather, communities are formed, and careers are born. A thriving music community requires a diversity of venues, in size and format, which allow musicians the opportunity to hone stage presence and build their audiences as they advance upwards through a circuit of venues of larger capacity.

In communities with pre-existing clusters of music venues and businesses, it may be useful to designate these areas as arts or cultural or entertainment districts in order to protect from the threats posed by gentrification and redevelopment. Music districts are an especially important tool for policymakers seeking to avoid the long, and short-term negative consequences of music venue closures.

LACK OF DATA ON VENUE CLOSURES

To date, as record-keeping practices vary, and zoning and licencing bylaws differ from municipality to municipality, comprehensive data on venue closures and openings in Atlantic Canada, is not readily available. However, many of our interviewees provided anecdotal evidence of venue closures in their communities, and announcements of venues closing continue to pepper the news.

OUTDATED REGULATIONS

Local zoning laws are the rules which stipulate the type of use permitted for any particular piece of land.⁴³ Music venues are a class of business frequently without clear recognition in zoning laws. To operate legally, businesses seeking to regularly offer music performances are subject to conform to outdated by-laws,⁴⁴ or engage in a costly and lengthy re-zoning process. As a business, they must fit into existing zoning rules and are typically categorized somewhere between 'restaurant' and 'bar.' This is a significant disadvantage for the viability of any local music community, discouraging entry of new entrepreneurs and causing operational delays, increasing overhead costs and puts these businesses at a disadvantage before the doors are even open.

THE SUCCESS OF SWIFT ACTION

Targeted action to modernize rules and regulations can create swift and meaningful results. In Nova Scotia, craft breweries and small-scale wineries have expanded to nearly 40 breweries from only a handful 10 years ago.⁴⁵

This dramatic increase in the number of businesses is due to the provincial government's efforts to reduce regulatory barriers as a result of communication with local industry experts.

Examples of the renewed attention to liquor policies and how updating policies have resulted in fewer barriers specifically for the music industry can be found elsewhere within Canada. In British Columbia, the provincial government began a substantial review of its liquor licensing policies in 2013. The "B.C. Liquor Policy Review" made 71 recommendations to government, and since then, the province has implemented 41 of these changes to its liquor laws. These changes included: setting up an online one-stop-shop for acquiring Special Occasion Licenses (which are required for live music festivals), allowing unfenced 'beer gardens' at festivals and public events, and allowing under-18-year-olds in pubs later (until 10 p.m.). According to the report, these changes were made with all efforts to "balance public health and safety, convenience for consumers and lessening the regulatory burden for manufacturers and licensees."⁴⁶ 🎵



GYPSOPHILIA AT THE BLACK STREET BLOCK PARTY / PHOTO BY ELI GORDON

EMBRACING NIGHTTIME CULTURE

“There is a lot of positive economic growth and development to be had by embracing nighttime culture. In Halifax, our city bylaws and regulations are very prohibitive when it comes to reaching our potential as an entertainment sector or a live music sector,” said Scott Long of Music Nova Scotia.

BLOCK PARTIES AND PAPERWORK

A thriving local music ecology needs opportunities and spaces suited for various performance options. Even informal events put on by the community can be stymied by the paperwork required to organize the event legally, or the municipality’s perception of their risk of liability. Long provided this example, “Say you want to close a street and have some music on a Saturday afternoon. The process of that, the red tape, it becomes nearly impossible, and they’re afraid to death to allow anything where alcohol might be involved.”

UNINTENDED CONSEQUENCES

Atlantic Canadians know firsthand how crucially important it is to be exposed to music as part of an intergenerational community. Joella Foulds, former executive director of Celtic Colours International Festival, explained how square dances offered young musicians the opportunity to master the Cape Breton style fiddle music through opportunities to perform at the dances in front of a discerning, yet supportive, music community.

“We don’t tend to think of square dances as part of the music industry, but when people like Natalie MacMaster are so successful – that is why! Musicians like Wendy MacIsaac, and Mary Jane Lamond – they can go all over the world and they’re absolutely revered and unique, because between them, not only do they have the Gaelic language, but they also have the incredibly strong fiddle style that you can’t find anywhere else,” and they were mentored in that style through being granted the opportunity to perform in front of multiple generations of ‘very picky’ musicians. “Then liquor laws came in,” said Foulds, “and made it such that a whole generation missed that training and that learning opportunity.”

AUDIENCES OF ALL AGES

Many musicians and music professionals begin a life-long relationship with music during childhood and adolescence – long before they can drive, vote, or leave for university or a career. In order to ensure continuity in creation and consumption of music in every community in Atlantic Canada it is important that young people have access to live music while they are growing up.

“Government could be doing a lot better at making live music venues more family-friendly,” said Ian McKinnon of GroundSwell Music, before providing this example:

“Case in point: My daughter, last year she was 17. We went down to see one of the artists that we are managing play at The Carleton. So she’s sitting there, with both her parents, at a table, with a meal. She’s sipping on a diet-coke, listening to live music. And she sat through the first set. Intermission came. It was 9:30 and she had to leave because it was no longer legal for her to be in that bar, listening to live music – even though she was there with her parents.”

Venues, where people of all ages can come together and enjoy live music, are essential to sustain a thriving music scene. Provincial and municipal regulations have a significant effect on the access that youth have to music in Atlantic Canada.

FOCUS ON ARTISTS INSTEAD OF ALCOHOL

In many communities, revisiting and reviewing the licencing and policies related to liquor sale, service, and regulation, would reduce many operational barriers experienced by music businesses and event promoters and remove a significant barrier to the growth of the live music economy. There are numerous examples of regions around the world where the regulation of liquor is approached differently. Several interviewees discussed their experiences working in other locations where the laws, and the resulting ambience, are different.



“It’s a different atmosphere in Europe in terms of music and artists and venues,” said artist manager Peter Rowan. “Any artist that goes over there is always so thrilled because it’s a different dynamic. In Europe, most of the venues are music halls that serve beer. Whereas, most of the models here are that the venue is a bar that has bands to help sell booze. It’s a completely different model. It’s a completely different dynamic and a completely different feel when you go to the shows in Europe.”

The substantial regulation that music businesses and productions face in Atlantic Canada contribute to the over-emphasis on alcohol in the business model. Rowan would like to see flexibility in the regulations which reinforce the bar-as-venue model and restrict, albeit unintentionally, the viability of alternative models like those found in Europe.

Immediate action revising alcohol and gaming rules with respect to music venues and performance could positively impact venues and the musicians who are increasingly dependent on their success. Across Atlantic Canada, municipalities and provincial governments have an opportunity to work with the local live music industry to identify and reduce regulatory barriers and create the conditions for a thriving industry.

RECOMMENDATIONS

- Provincial governments, in partnership with the live music industry, should undertake a comprehensive liquor policy review;
- MIA’s and governments, in partnership with the live music industry, should develop provincial best practice guides for venues, festivals, and events;
- Municipalities should work with community groups, non-profits, and the corporate community, and the live music industry, to produce events that better integrate intergenerational audiences and musicians of all ages.



KEN TIZZARD / PHOTO BY ALEXA COUPLAND



CHRISTINA MARTIN / PHOTO BY HL LOKER

MUSIC TOURISM

Music Tourism offers a substantial economic opportunity for the East Coast. “Not only does tourist spending represent ‘new’ money to a city [or province],” says the Mastering of a Music City report, “but it also generates additional spending beyond music. When tourists travel to experience live music, whether a concert, music festival or a favourite band in a basement venue, they will spend significantly more on hotels, restaurant meals, bars and other local attractions.”³⁴

The benefits of music tourism, as a distinct category of tourism, are being realized by other jurisdictions. In Ontario, the provincial Ministry of Tourism, Culture and Sport released a “Strategic Framework for Tourism in Ontario” which recognized the \$455 million in revenues generated by live music and commits to a music tourism component in the province’s Live Music Strategy.³⁵

DEFINING THE IMPACT IN ATLANTIC CANADA

Tourism is already a \$4.69 billion industry in Atlantic Canada, employing over 110,000 people, according to the Atlantic Canada Tourism Partnership.³⁶ Unfortunately, the spending associated with music tourism is currently aggregated within arts and cultural tourism of all types – obscuring the existing share contributed by music tourism specifically in the region. Distinguishing music tourist revenue from other types of tourist spending will make it easier to measure the gains from future investment in the music industry.

DRAWING AUDIENCES TO ATLANTIC CANADA

A robust music tourism strategy, which brands the destination as a place of music, brings indirect benefits in addition to the direct economic impact.

Shirley Montague, musician and founder of the Trails, Tales, and Tunes festival in Newfoundland, said “I think keeping music alive locally, organically, is extremely important. And I know there is a boom in the tourism industry, and it’s all tied to culture, which is tied to music.” Montague explained, “I live in a tourist area and I can tell you that those visitors coming to this area are looking to experience music, local music, local performers. That’s a big part of the economic engine. Particularly during the tourism months of the year.”

CELTIC COLOURS INTERNATIONAL FESTIVAL AND THE ECONOMIC IMPORTANCE OF LIVE MUSIC

The Celtic Colours International Festival ran for its 20th year in October 2016.

Celtic Colours is a nine-day celebration of Celtic music and features dozens of concerts, hundreds of community events, and touches more than 60 rural communities on the Island of Cape Breton.³⁷

The massive success of the festival led the Atlantic Canada Opportunities Agency (ACOA), through the Innovative Communities Fund, in 2014, to invest \$1.05 million over three years to assist the organizers in growing and expanding the reach of the world-class event. The benefit? In 2015, the festival spent more than \$11.5 million in communities around the island, and between 2012 and 2015, its audiences spent \$38 million in Nova Scotia.³⁸ In 2016, ticket sales reached 22,049, and the attendees of the festival injected more than \$13.2 million dollars directly into the local economy.³⁹

The success of this investment led to the recent commitment from ACOA to invest \$1.2 million dollars for 2017-2019.⁴⁰

One of the remarkable things about the Celtic Colours festival, according to Member of Parliament for Cape Breton-Canso, Rodger Cuzner, is that “the Celtic Colours International Festival extends Cape Breton’s tourism season well into the autumn.” Adding that the mid-October festival, “introduces local musicians and artists to visitors from more than two dozen countries, complementing other tourism offerings on the island and encouraging visitors to stay longer and explore.”⁴¹ 🎵



LOCAL TALENT, LOCALIZED INVESTMENT

The music industry must be a key partner in any future tourism campaigns in the region. The infrastructure, talent, and skills necessary to develop campaigns which promote the region while directly re-investing in the local music industry are available within Atlantic Canada.

ARTISTS AS TOURISM AMBASSADORS

Interviewees identified a significant opportunity to promote tourism in the region. East Coast musicians travel all over the world to play music, and everywhere they travel to perform, musicians are sharing their love of Atlantic Canada. “There could be some kind of grant or funding opportunity to support our touring, and to allow us to be ambassadors for the region.” Says musician Catherine MacLellan. It’s a simple idea. Why aren’t musicians paid to promote the region while they travel abroad?

RECOMMENDATIONS

Provincial and Federal Tourism Departments Should:

- In collaboration with the music industry contribute to the development of a music tourism strategy for the region, complementary to the Atlantic Canadian Music Industry Strategy, that leverages, supports and grows the region’s live music assets;
- Distinguish and prioritize music and music tourism data collection in order to better benchmark the current share and impact of music tourism, set realistic growth targets, and measure future gains;
- Explore the potential impact of a public relations or marketing campaign, in collaboration with music and tourism sectors, to highlight the success of East Coast music and leverage its brand.

5 | SUMMARY OF RECOMMENDATIONS

DEVELOPING REGIONAL CAPACITY

1. Develop an Atlantic Canada Music Strategy and an Atlantic Music Fund, in coordination and collaboration with music industry organizations, government stakeholders and other related organizations to complement existing programs, increase investment, and develop and incentivize musicians and music related businesses to reinvest in Atlantic Canada.
2. Atlantic Canadian Governments should adopt a region-wide lens for policy-making relating to the full breadth of the music industry, supported by full and consistent input and direction from all MIAs. Region-wide policy recommendations would require unanimous support and feedback from all MIAs.
3. Encourage collaboration between and among music industry organizations and associations in Atlantic Canada.
4. Expand opportunities to apply for funding as a collective in support of large-scale projects focused on increasing industry capacity.
5. Encourage flexible and balanced provincial and MIA funding criteria which, when appropriate, allow successful applicants to claim work with musicians, music professionals, and music businesses based in any of the Atlantic provinces as 'eligible expenses.'
6. Develop a strategy to attract, train, and retain music professionals in Atlantic Canada. A strategy could include dedicated resources to close the training gap and meet the current and future demand for industry-related services within Atlantic Canada.
7. Develop and delivery of a pan-Atlantic business incubation program for artist managers. Program should include: mentorship with an experienced manager, in-class training, partnerships with working artists, a financial stipend for (eg.) a minimum of one year.
8. Atlantic Canadian governments, in collaboration with industry, should develop a strategy to address the physical music industry infrastructure deficit. A strategy could include resources to upgrade sound equipment and address room acoustics through redesign or renovations.

A VALUABLE ECONOMIC CONTRIBUTOR

9. Revise the criteria for small business/entrepreneurial programs and grants to ensure music industry businesses, including live music businesses, are made eligible.
10. In partnership with local government and industry, build and maintain a healthy live music ecology across Atlantic Canada through the implementation of best practices in policy, tax and regulatory practices from around the world.
11. Ensure Federal and Provincial wage subsidy programs, such as the Canada Job Grant and Youth Employment Grant, as well as provincial employment programs, include private music businesses and non-profits are eligible for subsidies to hire students, unemployed, and underemployed persons.

MUSIC EDUCATION

12. Each Provincial Ministry of Education should identify gaps in access to quality music education at the primary, secondary, and post-secondary level.

13. Each provincial Ministry of Education should form a collaborative task force to identify strategies to increase access to quality music education. This should include music educators, music industry professionals, artists, current students and recent graduates.
14. Industry Associations should partner with provincial Ministries of Education to identify various experiential learning opportunities for youth.

MUSIC CITIES FRAMEWORK

15. Designate a single point of contact for music industry to provide a stable point of contact between industry and government. For larger municipalities, this may be a stand-alone music officer, and for smaller municipalities this role may be added to an existing portfolio.
16. Review municipal policies across departments, working with industry stakeholders to identify challenges and opportunities. Examples include land-use planning, transportation plans, by-laws, and economic, recreational and cultural planning strategies.
17. Convene a music working group, including representatives from industry and government to draft and implement local music strategies.

LIVE MUSIC AND AUDIENCES OF ALL AGES

18. Provincial governments, in partnership with the live music industry should undertake a comprehensive liquor policy review.
19. MIA's and governments, in partnership with the live music industry, should develop provincial best practice guides for venues, festivals, and events.
20. Municipalities should work with community groups, non-profits, the corporate community, and the live music industry, to produce events that better integrate intergenerational audiences and musicians of all-ages.

MUSIC TOURISM

21. In collaboration with the music industry contribute to the development of a music tourism strategy for the region, complementary to the Atlantic Canadian Music Industry Strategy, that leverages, supports and grows the region's live music assets.
22. Distinguish and prioritize music and music tourism data collection in order to better benchmark the current share and impact of music tourism, set realistic growth targets, and measure future gains.
22. Explore the potential impact of a public relations or marketing campaign, in collaboration with music and tourism sectors, to highlight the success of East Coast music and leverage its brand.



GORDIE MACKEEAN AND HIS RHYTHM BOYS / PHOTO BY ALEXA COUPLAND

6 | ACKNOWLEDGEMENTS

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ENDNOTES

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³The dedicated support for the music industry from the provincial government over three decades has further contributed to the elevated level of success in Nova Scotia.

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⁵Royalties paid to East Coast songwriters and music publishers during 2015 (January 1st to December 31st). Please note that royalties are distributed quarterly. These figures cover royalties earned between April 1st 2014 and March 31st 2015. Data generously supplied by SOCAN.

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⁸Statistics Canada, CANSIM, table 051-0001.

⁹SOCAN royalties do not include revenue generated from music placement in media such as film, radio, video games, and television. Those revenue sources are primarily negotiated privately, usually between a production company and a music publisher, agent, or label, and is not publically available. Revenues for placement in film, radio, video games, and television, like royalties collected and distributed by SOCAN, are sources of ongoing income for the creator and/or right’s holder.

¹⁰Data compiled and supplied by SOCAN.

¹¹Figure for Nova Scotia includes Cape Breton.

¹² Generally, the term MIA refers to the associations who are regional affiliates of FACTOR. Under that definition, the ECMA and CBMIC are not technically considered a MIA. However, as the ECMA, CBMIC and the MIAs all offer opportunities and services tailored to their specific membership that benefit the region’s musicians and strengthen the industry in Atlantic Canada, for the purposes of this report, the term MIA includes the ECMA and CBMIC.

¹³ Statistics Canada, Census of population, Highlights Tables (98-402-X2016001).

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²⁷ FAI ran from February 15th – 17th, 2017.

²⁸ Months of collaboration among the organizations resulted in 16 artists or groups performing, and six music industry businesses and organizations represented at this major industry event. The economic impact of this initiative was being tabulated at the time of publication, however, specific data will be forthcoming.

²⁹ Figures generously supplied by CBMIC, April 7, 2017.

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³¹ Music Canada and IFPI, “The Mastering of a Music City,” 2015: pg. 13.

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³³ Music Canada and IFPI, “The Mastering of a Music City,” 2015: pg. 43.

³⁴ Music Canada and IFPI, “The Mastering of a Music City,” 2015.

³⁵ “Growing Tourism Together: Strategic Framework for Tourism in Ontario,” Ministry of Tourism, Culture and Sport, 2016. Available at: http://www.mtc.gov.on.ca/en/tourism/pdf/strategic_framework.pdf

³⁶ Atlantic Canada Tourism Partnership. Available at: <http://actp-ptca.ca/>

³⁷ “Cape Breton Communities Welcome Celtic Colours,” News Release from the Atlantic Canada Opportunities Agency, October 7, 2016. Available at: <http://news.gc.ca/web/article-en.do?nid=1134649>

³⁸ “Government announces support for Celtic Colours,” *Port Hawkesbury Reporter*, October 19, 2016. Available at: <http://porthawkesburyreporter.com/governments-announce-support-for-celtic-colours/>

³⁹ Figure generously supplied by Celtic Colours International Festival, April 10, 2017.

⁴⁰ Figure generously supplied by Celtic Colours International Festival, April 10, 2017.

⁴¹ Cape Breton Communities Welcome Celtic Colours,” News Release from the Atlantic Canada Opportunities Agency, October 7, 2016. Available at: <http://news.gc.ca/web/article-en.do?nid=1134649>

⁴² Music Canada and IFPI, “The Mastering of a Music City,” 2015.

⁴³ Some municipalities, usually in rural areas, have no zoning or land use laws. In such instances most uses of a piece of land are legal as a condition of ownership. Most zoning regulations are put in place to prevent conflicts between land use, such as homes next to an odorous landfill, or reducing environmental risks such as the risks posed by a manufacturing plant located too close to a municipal source of drinking water. Land use zoning has also been used to discriminate and target specific groups or types of businesses and limit or prevent their operation (Talen, Emily. 2012, *Zoning and Diversity in Historical Perspective*, *Journal of Planning History*).

⁴⁴ Halifax Regional Municipality, a major population centre in Atlantic Canada, is currently overhauling the municipal by-laws in the population centre of the municipality. The existing municipal zoning laws for the area under review were primarily enshrined in law in the 1970s (<http://www.halifax.ca/centreplan/>).

⁴⁵ David Pate, “Nova Scotia craft beer producers say co-operation, not competition, key to success,” *CBC News*, October 16, 2016. Available at: <http://www.cbc.ca/news/canada/nova-scotia/craft-beer-producers-co-operation-key-success-brewers-1.3805270>

⁴⁶ “B.C. Liquor Policy Review: Final Report,” British Columbia Ministry of Justice, October 2013. Available at: http://www2.gov.bc.ca/local/haveyoursay/Docs/liquor_policy_review_report.pdf