



Saskatchewan Music Industry Review Final Report: The Path to Cultural Commerce

*Submitted by
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Legislative Secretary to the Premier*

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Letter of Transmittal

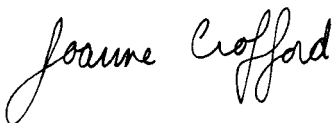


I am pleased to present to Premier Lorne Calvert and Saskatchewan Culture, Youth and Recreation Minister Sandra Morin the Final Report of the Music Industry Review. This report outlines a vision, a business structure and a model for the future development of the Saskatchewan music industry and for the cultural industries more broadly.

This report sets forth an ambitious plan for launching our music industry onto the world stage, taking advantage of opportunities unique to Saskatchewan. The global economy has capitalized on cultural production and expression. With strategic support from the government and the people of Saskatchewan as outlined in this report, the Saskatchewan music industry can do the same. On the initiative of our talented and resourceful musicians, artists and entrepreneurs, Saskatchewan's music industry can increase its share of local, national and global cultural markets. Saskatchewan will be known as a place where quality, creativity and leading-edge cultural production occurs in a skilled and hospitable environment.

In conducting this review, I was moved to see the pride the people of Saskatchewan have in our artistic community, the talent of our artists and the quality of art produced here. Not only do the arts contribute to our quality of life and the viability of our communities, they are a significant part of the economy. The music industry and the organizations that support it are a large part of this success.

I wish to thank Premier Calvert for his vision and for giving me this rare opportunity to work with an outstanding part of our community. I look forward to implementation of these recommendations and will look back with pride at this moment in history when Saskatchewan advanced as a leader in development of both artists and cultural enterprises by strengthening our position in the global, creative economy.

A handwritten signature in black ink that reads "Joanne Crofford". The script is fluid and cursive, with the first name "Joanne" and last name "Crofford" clearly legible.

Joanne Crofford
Legislative Secretary
Music Industry Review

Acknowledgements

This review has taken me on a long journey, during which I made many new friends and associates. Over the course of the last year, I met with some of the most talented, creative and dedicated people from the music, arts and cultural communities in Saskatchewan. In these people, I found a determination to create the optimum conditions for the music industry, and the cultural industries in general, to realize their full potential. I thank Sask. Creative Music Inc., who created a momentum to the review by securing four major music events in 2007, which elevated the profile of music in Saskatchewan.

I am grateful to the many people who freely gave of their experience, knowledge, skills and time to provide me with their best advice throughout the course of this review.

Government officials from Saskatchewan Culture, Youth and Recreation (CYR), provided invaluable administrative and research support under the leadership of Dawn Martin, Executive Director of the Culture and Heritage Division, and Susan Hetu, Director of Cultural Policy Branch. Heather Ritenburg, Policy Analyst with the Branch, provided policy and planning support. She conducted the ongoing literature review and worked tirelessly throughout the bulk of the review. At the end of her term at CYR, her role in this review was assumed by Senior Policy Analyst, Calista Meinert. The two surveys that informed this review were conducted by CYR's Evaluation Unit staff: Dr. Dwayne Baker, Robyn Passmore and Jesse Sakires.

Justine Gilbert, a student at the University of Regina, supported the review process while assigned to my office under the Saskatchewan Legislative Internship Program.

Finally, thank you to all of those individuals and organizations who met with me personally throughout the year and took part in the consultations facilitated by *Do Process Facilitation Services*. They spent endless hours considering options and proposing ideas. I received input from individual musicians, music industry professionals, music and cultural organizations, media outlets, investors, venue operators, festival organizers, equipment providers and people from within government.

The Manitoba Recording Industry Association (MARIA), the Government of Manitoba, and members of the Manitoba music community generously shared their ideas and experiences in music industry development. As well, representatives of Saskatchewan's francophone community presented the Quebec cultural industry development model.

This Music Industry Review, initiated one year ago by Premier Lorne Calvert, was only possible because of these people. Thank you all!

Joanne Crofford,
Legislative Secretary
Music Industry Review

Executive Summary

We need to create an industry that is integrated, connected and resourced . . . a model that is intentional, not accidental.

In 2007, Saskatchewan hosted three Canadian music industry events (the Juno Awards, the Canadian Country Music Awards and the Western Canadian Music Awards) and Waniskā, a provincial Aboriginal music showcase. In this same year, the Premier of Saskatchewan, thanks to his recognition of the social, cultural and economic impact of the music industry, initiated the Music Industry Review. The purpose of the review was to promote, foster and strengthen Saskatchewan's music industry.

The economic and social impacts of the music industry are intricately related. Saskatchewan's music industry provides meaningful career and business opportunities within the province. In fact, on a national level, the music industry's labour force has grown at a much higher rate than the overall labour force. The music industry appeals to young people as musicians, industry professionals and as consumers of recorded and live music. It follows that the development of the music industry will help attract and retain Saskatchewan's youth population, a priority for government.

In the music industry, the average income is far lower than the average income in Canada, despite higher than average educational credentials. Within the broader cultural industries, of which music is a part, very few people have the standard employer-employee relationship. The majority of the work in the cultural industries is contract, short-term and event-centered employment. This requires artists and industry professionals to function in similar ways to small businesses or individual contractors.

At a time when technology and music consumption habits are shifting the economic model of music to the global marketplace, it is more important than ever to ensure the viability of Saskatchewan's music industry. Saskatchewan musicians and industry professionals are prepared to take part in the new commerce of music. This review investigates the kinds of supports needed to create an environment where the music industry can thrive, including how the industry can adapt to a new commercial environment.

This review began with a literature review and a consultation process. The short-term priorities identified through the first phase of the work were intended to capture the momentum of the major music events in Saskatchewan.

During Phase II of the review, two major surveys were conducted and another major consultation was undertaken. The focus of the surveys and the major consultation was to determine what changes need to be made to improve opportunities for those working in the music industry and what supports and structures are needed to deliver on those changes.

As the review of Saskatchewan's music industry progressed, barriers to development emerged. While there are pockets of real success in Saskatchewan's music industry, the problems of the industry may be characterized in three words: *under-resourced, under-focused and under-connected*.

The music industry lacks sufficient resources at all levels. Many musicians and industry professionals struggle to earn a sufficient income from their music. Grant income and loans from financial institutions are increasingly difficult to secure. Industry associations, such as SaskMusic, struggle to provide sufficient supports using current resources. The under-financing of the music industry has meant that the ability to capture opportunities when they arise and the ability to grow and expand is minimal.

While commercial activity in the music industry abounds, there is an insufficient focus on the commercial aspect of music. This appears to be a systemic problem, in that the available resources do not explicitly require entrepreneurial behaviour, including the development of business plans, evidence of effective management and solid marketing, promotion, touring and distribution strategies.

Lastly, while relationships with other industries (such as the film, media, tourism, advertising and hospitality industries) as well as relationships between associations within the music industry exist across Canada, they are not well developed in Saskatchewan. The result is a number of opportunities are missed and the lessons and best practices of others are not shared.

On a global scale, the music industry is in a period of transition. Technological changes and music consumption habits are much different now than they were even 10 years ago. At the same time as recorded music sales continue to decline, opportunities to secure revenue from other sources, such as through licensing agreements, abound. The commercial environment of the music industry is evolving.

During the course of this review, it also became clear that many of the barriers to the development of the music industry are also barriers to the development of other cultural industries: film, book publishing and the visual arts and crafts. While this review maintains a focus on music industry development, the findings crosscut many cultural industries identifying common strategic needs and potential synergies.

To understand the elements of a successful music industry development model, two existing models were analyzed: one in Manitoba, and the other in Quebec.

The strength of the Manitoba model lies in its program supports and in the relationships between the music industry and other industries. One of the reasons a strong music

industry exists in Manitoba is the focus on developing strong business habits in organizations, musicians and industry professionals.

Quebec's greatest strength lies in its funding and investment structure. It adopted ambitious financial models that provide investment tools for professionals in all of the province's cultural industries. The value Quebec places on its cultural industries has resulted in an economically strong industry sector.

A common element of these delivery models is they have mechanisms in place to drive commercial activity. For instance, to be eligible for the various programs, musicians and industry professionals must demonstrate their project is commercially viable by developing business plans that include promotion, marketing and distribution strategies. For reasons of both larger market access and increased sophistication of operation, both models also acknowledge that music markets must be developed outside of the local geographic region. This requires the industry to assume the risk that its most talented members may move elsewhere in search of new opportunities, a necessary risk for development of the industry.

The proposed structure to support the development of Saskatchewan's music industry adopts the commercial focus evident in both models. Specifically, the proposed structure incorporates many of the programmatic aspects of the Manitoba model, but closely reflects the wide scope of Quebec's cultural industry development model.

The proposed structure also echoes ideas from previous reports regarding the development of the music industry, the cultural industries and the arts in Saskatchewan: the 1994 study on Saskatchewan's music industry, *Saskatchewan's Music Industry: An Independent Consultant's Study*, the 2006 Final Report of the Minister's Advisory Committee on Status of the Artist (MACSA); the 2005 Film Industry Report: *15 Years Making Pictures: A Review of the Provincial Government's Role in the Saskatchewan Film and Video Industry 1989 – 2004*; the 1997 Cultural Industries Development Strategy For Saskatchewan, a 1994 consultant's report on the Music Industry, and the 1990 Saskatchewan Arts Strategy.

The proposed structure addresses the three systemic issues (*under-resourced, under-focused, and under-connected*) in Saskatchewan's music industry, which are also evident in all of the cultural industries. In addition, this review endeavours to prepare the music industry to better participate in commercial ventures.

Like any other industry development initiative, the music industry development initiative will require serious engagement, planning and thoughtful application of investment, policy and tax tools. It will require the support and engagement of the private sector, including tourism, economic development, media and marketing professionals. No industry can grow in isolation. This initiative will require key players in the music industry, including musicians, industry professionals and professional associations, to maintain their focus on the business of music. Finally, this review has uncovered some examples of best practices in music industry development. One vital aspect of music industry development in other jurisdictions has been the willingness and resources of key players to develop relationships within the industry and beyond and to learn from the experiences of others.

The recommendations are organized into two sections, to focus separately on sustaining and growing the music industry, and on addressing issues common to all of the cultural industries. The following represents a summary of the recommendations:

Part 1 – Music Industry Development

Infrastructure and Career Development Support

1. Strengthen the role and resource base of SaskMusic and capitalize on its credibility in supporting professional and industry development.

Part 2 – Cultural Industry Development

Deliver Structure

2. Situate responsibility for commercial support in the arts and cultural industries within the Saskatchewan Arts Board, and enhance its resource base accordingly. Capitalize on its existing relationships with artists and cultural industry professionals.

Market Access

3. Provide the Saskatchewan Arts Board with the resources to develop and implement a comprehensive touring support program, building on the recommendations of the Minister's Advisory Committee on the Status of the Artist, 2006 Final Report.
4. Partner with private and public broadcasters to increase the prevalence and recognition of Saskatchewan talent.
5. Review the Festivals Grant Program through SaskCulture and the Saskatchewan Cultural Exchange Society.
6. Develop a hosting policy framework to provide guidance to government for evaluating the appropriateness of provincial support for and to assess the economic and social impacts of large scale music and cultural events.

Branding, Marketing, Distribution and Export Activities

7. Develop a branding, marketing and distribution strategy for Saskatchewan cultural products and performances led by the Saskatchewan Arts Board, in collaboration with cultural industries, tourism, Saskatchewan product branding, and export associations.

Policy Changes

8. Work with key partners to establish principles for the development of tax incentives and investigate other options to further support music and cultural sectors, led by CYR.

9. Develop outcome measures to chart the progress and success of the music and cultural industries, led by CYR with its partners.

Implementation

10. Establish a Saskatchewan Music Industry Panel, modelled after the Saskatchewan Construction Industry Panel, to facilitate the formation of key industry relationships for the implementation of recommendations in this review, co-led by CYR and the music industry.

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Introduction

Introduction

In May 2006, Regina Rosemont MLA Joanne Crofford was appointed by Premier Lorne Calvert to undertake a review of the music industry in Saskatchewan. The purpose of the review was to promote, foster and strengthen Saskatchewan's music industry. The review focused on ways to establish stronger commercial and professional supports.

As noted by Premier Calvert, at the Canadian Country Music Awards (CCMA) Industry Brunch and Awards in 2007, "Our province is in the great plains where music is in the soul of the land and the soul of a people ...The cultural industries generally, and music in particular, already are more significant in our economy here and across Canada than many other industries that demand and get much more of our attention....No civilized society remains civilized for long without support for its poets, its artists, its singers. My government is committed to ensuring this support." This review fulfills the Premier's pledge to support the development of the music industry, and more broadly, of all the cultural industries.

Such support has profound cultural, social and economic benefits. A vibrant music industry provides intrinsic value to individuals, as people are drawn to culture and the arts for pleasure, stimulation and individual expression. There are also numerous benefits to society and individuals. Cultural activity builds social capital, enhances education and community well-being, engages young people, inspires innovation and provides meaningful careers and business opportunities. Creative environments attract and retain skilled, innovative and creative people, resulting in numerous direct and indirect economic spin-offs.

This review occurred at an opportune time. The four major music events of 2007 focused provincial interest on music and built momentum, raising the profile of the Saskatchewan music industry and capturing the attention of the national and international music industry. The review has capitalized on this momentum with recommendations intended to assist Saskatchewan's music industry in maintaining this energy. Additionally, the Government of Saskatchewan recently launched a campaign to raise awareness about the already high quality of life here in Saskatchewan. Development of the music industry will further enhance Saskatchewan's quality of life.

The music industry review follows a 2005 review of the film industry in Saskatchewan. In the 2006 Speech from the Throne, Premier Calvert announced, "building on an impressive track record in establishing a thriving film and video industry, a similar course for the creative economy of music and the arts will be charted." The film review resulted in some

of the most competitive film policies in the world, which have attracted a number of high-profile film productions, as well as seeded three successful home-grown television shows: *Corner Gas*, *Little Mosque on the Prairie* and *renegadepress.com*. This review strives to achieve similar levels of success for the music industry.

In trying to understand the current and future opportunities and challenges that face Saskatchewan's music industry, a variety of consultations were held with music industry leaders based in Saskatchewan. The list included: musicians, songwriters, music educators, publishers, managers/agents, producers, labels, studios, recording engineers and technicians, publicists, distributors, venues, broadcasters, media, provincial music, arts and related organizations and other stakeholders.

The review was conducted in two phases. Phase I, with a focus on creating short-term recommendations to assist Saskatchewan's music industry in capitalizing on the many music events of 2007, began in the summer of 2006 and concluded in January 2007.

Phase II of the report was designed to build upon the consultations and literature review in Phase I. Where Phase I recommendations were intended as short-term, Phase II recommendations were designed to address more fundamental issues within Saskatchewan's music industry.

While the review was intended to address the development of commercial and professional supports for the music industry, it soon became apparent that similar barriers to industry development are faced by the remaining cultural industries: the visual arts and crafts, book publishing and, to a lesser extent, film and video. It was found that in Saskatchewan, the music industry, and the cultural sector as a whole, is *under-resourced, under-focused and under-connected*. The review has focused on addressing these three fundamental issues within the music industry specifically and the cultural industries generally. In doing so, the recommendations in this report echo approaches that the cultural sector has been advocating for years.

This is a very competitive industry. To enhance success at home, Saskatchewan needs its voice heard and represented on the world stage in today's global economy.

Design of the Review

Design of the Review

The Music Industry Review was conducted in two phases.

Phase I - May to December 2006

Phase I was intended to build momentum on and support for the four major music events of 2007: the Juno Awards, the Canadian Country Music Awards (CCMAs), the Western Canadian Music Awards (WCMAs) and an Aboriginal music showcase, Waniskâ.

Phase II - January to September 2007

Phase II was intended to support the development of the music industry well into the future.

Phase I

Phase I began with a literature review and consultations with musicians and industry professionals in individual and small group discussions.

The literature review was conducted to gain an understanding of the broad issues facing the music industry on a global level, to identify best practices employed by other jurisdictions to address universal challenges and to draw from past reports on the music industry, the cultural industries and the arts in Saskatchewan. The role of the cultural industries in social and economic development, including the development of creative economies was also investigated throughout the literature review.

The consultations in Phase I generated an understanding of the current state of the Saskatchewan music industry and informed the formulation of a plan to further develop the music industry. Throughout October and November 2006, 98 music industry leaders participated in 11 discussion groups in four cities across the province. The discussions were observed by Legislative Secretary Crofford and by CYR officials. The facilitators' report detailing these fall consultations, including the question guide used to focus the discussions, can be found in *Appendix 1*.

The Music Industry Review Interim Report (Appendix 2) was released in January 2007, marking the conclusion of Phase I. The *Interim Report* identified eight priorities for further investigation in Phase II:

1. a business model for industry growth and investment;
2. maximizing alternative revenues;
3. live music venues and the development of new venue/event opportunities;
4. impact and best use of technology to support the industry;
5. education, training and development;
6. maximizing the benefits of "creative economies" to music;
7. effective promotion to internal and external markets; and
8. meaningful involvement of youth in the industry.

Phase II

Throughout Phase II, Legislative Secretary Crofford conducted a series of informal interviews with individuals who: had demonstrated, during previous consultations, particular insight into the challenges faced by the Saskatchewan music industry; had been recommended by consultation participants; or had been invited to take part in the consultations but were not able to attend. Phase II of the review also included the continuation of the literature review, primary research in the form of two major surveys and a final stakeholder conference.

CYR Public Survey: Saskatchewan Residents

The intent of the *CYR Public Survey* was to collect information about consumer attitudes towards music and music events and information about their music consumption habits. It was designed to capture a snapshot of the existing music market in Saskatchewan. Over 1,200 Saskatchewan residents participated in this survey conducted in February and March 2007. A random sample of Saskatchewan residents was recruited by direct email invitation to participate in the survey. A self-selecting sample of Saskatchewan residents participated in the survey through a public access website. Survey participants were automatically entered in a draw for two tickets to the Juno Awards in Saskatoon. A summary of the findings from the *CYR Public Survey* can be found in *Appendix 3*.

CYR Professionals Survey: Saskatchewan Musicians and Industry Professionals

The intent of the *CYR Professionals Survey* was to investigate the attitudes of professionals regarding the environment of the music industry, as well as their levels of engagement in various aspects of the music industry. Between February and May 2007, 475 Saskatchewan musicians and industry professionals participated in this online survey. Participants were recruited through generic mass emails and by direct email invitation. The sample was made up of members of Saskatchewan organizations engaged in the music industry and participants in the *CYR Public Survey* who indicated that they were music industry professionals. A summary report detailing the findings of the *CYR Professionals Survey* can be found in *Appendix 4*.

Final Stakeholder Conference

A Final Stakeholder Conference was held to determine a path for the future of the Saskatchewan music industry. The conference was held in Regina on May 30, 2007. Representatives from all areas of the music industry, including provincial organizations and associations, venue operators, musicians and other industry professionals, attended the one day event. A complete list of all stakeholders who took part in the Phase I and Phase II consultations is included in *Appendix 5*.

The conference began with presentations to inform group discussions. The three presentations focused on: music industry development in Manitoba, music industry development in Quebec, and preliminary results of the two major surveys conducted by CYR.

Conference participants took part in three small group sessions, led by a consultant, to discuss the merits of music industry models employed in Quebec and Manitoba, to discuss investment strategies for the music industry and to identify key relationships that would maximize the success of industry development efforts. The Question Guide for the small group discussions can be found in *Appendix 6*.

As the conference drew to a close, participants were asked to identify something from the discussions that had inspired them, that they had learned or that they were motivated to do as a result of having participated in the conference. This report can be found in *Appendix 7*.

Findings – What we Learned

Findings – What we Learned

“It is often said that Saskatchewan people are the most creative and the most innovative by nature. My government believes in the strength of creative economies and the enhancements to our quality of life that are brought by innovation and the arts.”

- Premier Lorne Calvert, 2006 Speech from the Throne

At the close of Phase I of this review, the *Interim Report* identified three short-term priorities for immediate government response. The following initiatives took place between December 2006 and June 2007:

1. **Create a Buzz** – About a dozen artists visited 70 schools across the province to perform briefly and to discuss their careers in the music business. The program was intended to build student interest in the music industry and encourage them to consider music as a career option.
2. **Audience Building and Performance Opportunities** – Seven *ArtSmarts* experiences specifically relating to music took place in five Saskatchewan communities. The *ArtSmarts* program enhances education through the use of art, while sparking student interest in the arts as discerning consumers.
3. **Industry and Musician Readiness for 2007** – Saskatchewan Culture, Youth and Recreation provided SaskMusic with resources to deliver workshops to help musicians prepare their performances for showcases related to the four major music events in 2007.

The Social Significance of the Music Industry

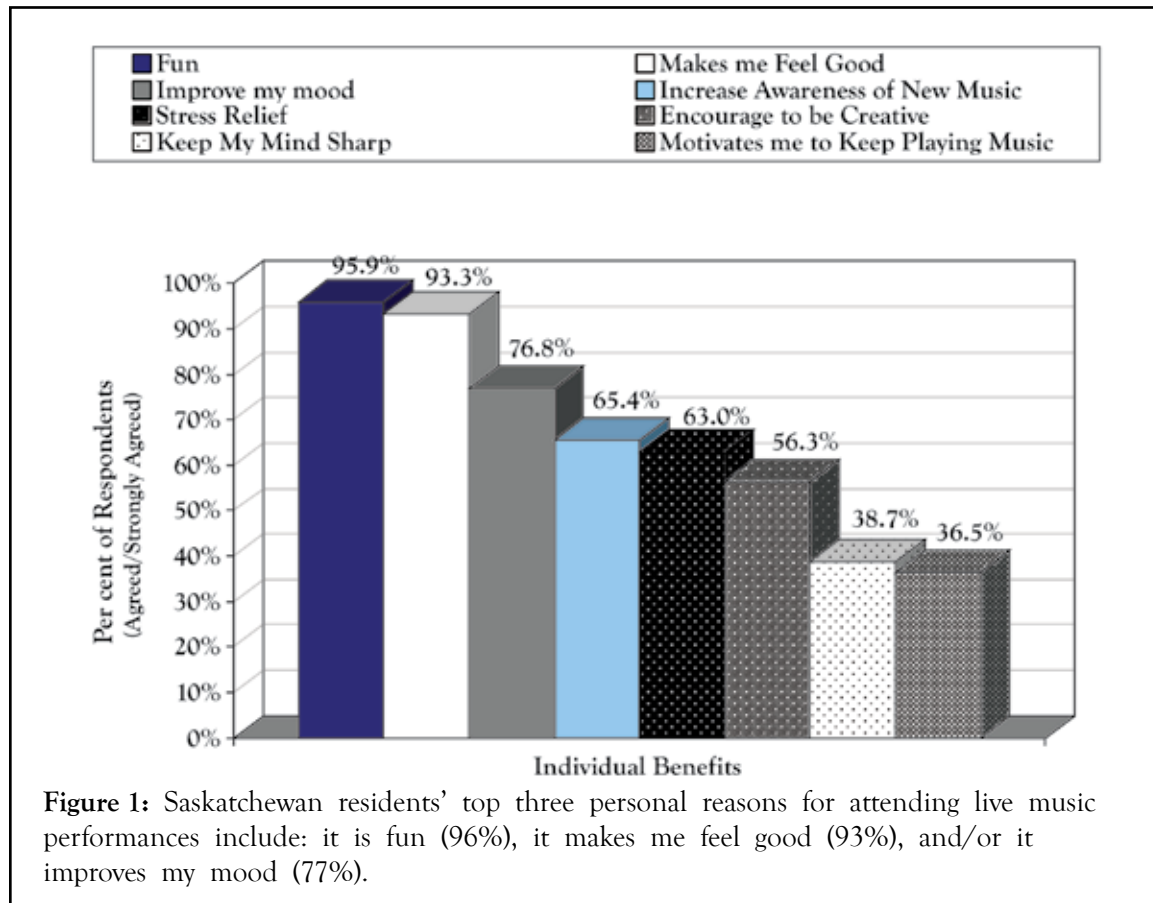
One of the most recognized contributors to the body of research that supports recognition of the arts and culture as integral to the social, economic and civic development of communities, regions and nations is Richard Florida, who wrote *The Rise of the Creative Class* in 2002. Globally, there is a growing interest in understanding the role of the arts and culture in the transformation of communities and economies. Business and government leaders recognize that cultural infrastructure, through its direct impact on a community's quality of life, sharpens the competitiveness of businesses in the community by attracting both people and investment (Canadian Council of Chief Executives, 2006).

The availability of cultural experiences and activities transforms communities and economies through the generation of three types of values: intrinsic, instrumental and economic.

Intrinsic Value

Intrinsic values are benefits that accrue to the individual. People are drawn to culture and the arts for the experiences of individual expression, pleasure, emotional stimulation and meaning. Whether individuals experience music alone or in groups, they derive individual benefits from the experience. CYR's *Public Survey* asked respondents to rate, in order of

importance, the intrinsic benefits of attending live music. As illustrated in the chart below, Saskatchewan residents' top three personal reasons for attending live music performances include: it is fun (96%), it makes me feel good (93%) and/or it improves my mood (77%).

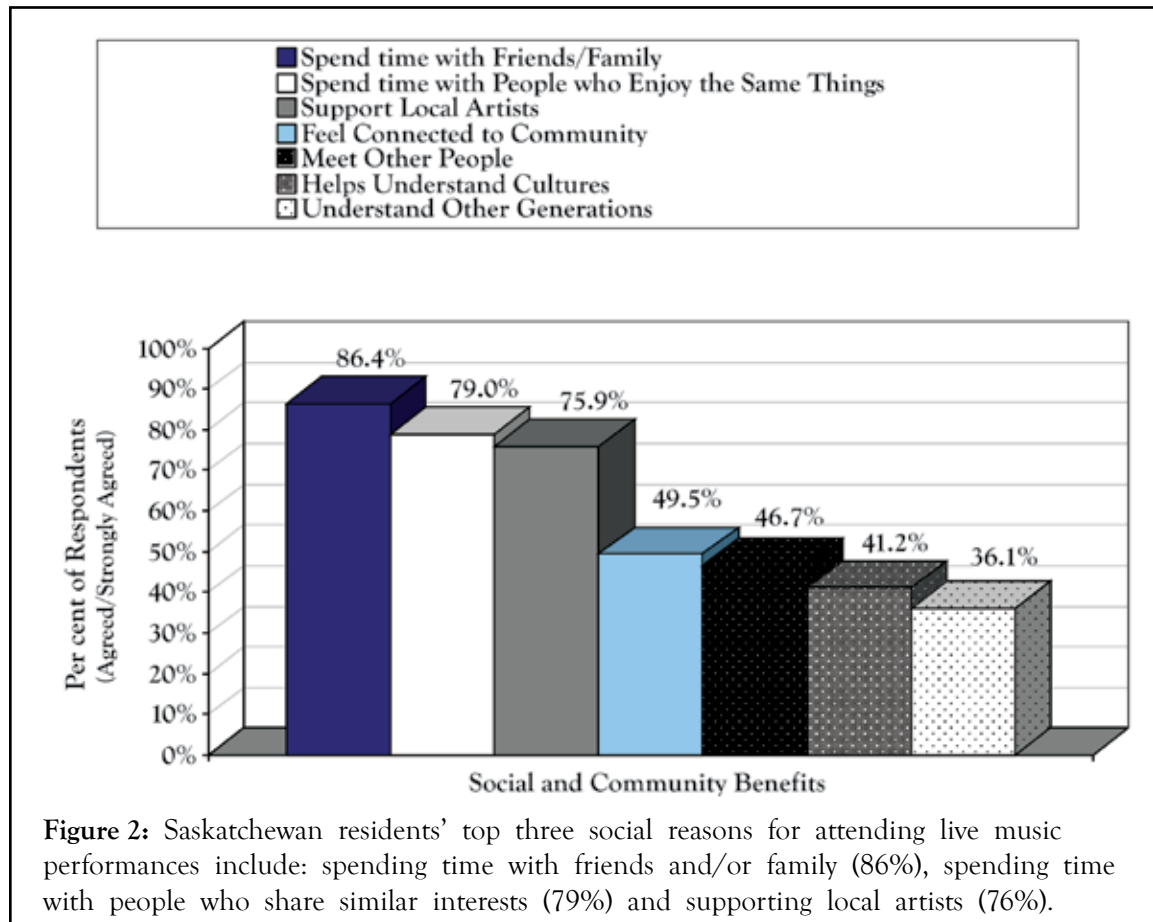


Instrumental Value

Instrumental values, or indirect benefits that accrue to society, are also evident when individuals participate in cultural and artistic experiences. Arts and culture can enhance education and learning, build healthy communities and vital neighbourhoods, engage young people, assist people to overcome personal and social barriers, build social capital, inspire innovation and provide a basis for branding a location both nationally and internationally (Duxbury and Pepper, 2006; and Florida, 2002).

Evidence suggests that youth participation in the arts is of particular importance. "... youth involved in extracurricular arts programs – more so than those involved in other extracurricular programs (sport, academic, and community involvement) – do better in school due to the mixture of 'roles, risks, and rules' offered by arts programming.... do better in their personal lives.... [and] use their free time in positive and constructive ways" (Creative City Network of Canada, 2005, p. 4-5).

CYR's 2007 *Public Survey* asked respondents to rate the social and community benefits of attending live music performances. The results reveal that Saskatchewan residents listen to live music to feel socially connected to others, as illustrated in the chart below.



Economic Value

Research suggests there is “growing evidence that artistic and cultural creativity plays an important role in transforming communities into destinations of choice for skilled people in any occupation” (Canadian Council of Chief Executives, 2006). In other words, regions that are able to offer cultural and artistic experiences are better equipped to attract and retain skilled, innovative and creative people. A skilled labour force is key to a prosperous economy.

“Municipalities that adopt culture as an industry have gained positive economic benefits for their communities. Cultural industries create job growth, turn ordinary cities into ‘destination cities,’ create interconnections between arts and business, revitalize urban areas, attract skilled workers, and create spin-off businesses” (Creative City Network of Canada, 2005, p. 4).

“All over Saskatchewan, leaders are searching for the secret to stimulating economic growth. Most are looking for a golden opportunity to increase new business, retain current residents and bring new residents and visitors to their communities” (SaskCulture, n.d.). These ends may be achieved by capitalizing on the uniqueness of local culture.

The Economic Significance of the Music Industry

Economy

Canada is the third-largest source of English-language music in the world (Canadian Independent Record Production Association, n.d.). The Canadian arts and culture sector as a whole is worth \$43.2 billion to the Canadian economy, capturing four per cent of Canada’s total GDP. From 1996 to 2003, the output of the cultural industries in Canada grew by 48 per cent (Cultural Statistics Program, 2007). Canadian cultural exports capture an average of \$5 billion annually (Department of Foreign Affairs and International Trade Canada, n.d.).

Labour Force

The arts labour force in Canada tripled from 1971 to 2001, while the overall labour force grew by only 81 per cent (Hill Strategies Research Inc., 2004, p. 2). Analysis of the data reported by Hill Strategies in 2004 reveals that approximately one-quarter of the Canadian arts labour force in 2001 was engaged in the music industry as musicians, singers, conductors, composers and arrangers.

While professional artists hold university degrees, certificates or diplomas at approximately twice the rate of the overall labour force (Saskatchewan Culture, Youth, and Recreation, 2006, p. 18), their earnings do not reflect it. In 2001, average earnings from arts occupations in Canada were \$23,490, much lower than average earnings for Canada’s overall labour force, at \$31,757. This income gap exists partially because “the rate of self-employment was over five times higher for artists than for the overall labour force” (Hill Strategies Research Inc., 2004, p. 2), and even “self-employed artists... make much less than artists with a paid employment position” (Ibid. p. 3).

Market

Like most of the world, Canada’s physical retail market for music is shrinking. In the last couple of years, retail space for CDs has contracted by approximately 30 per cent (FAD Research, 2004, p. 43). According to the International Federation of the Phonographic Industry (IFPI), “retail sales of recorded music in Canada fell by 4.7% from \$946.4 million in 2003 to \$901.9 million in 2004” (Department of Canadian Heritage, 2005), a loss of \$44.5 million. Rising digital music sales are not sufficient to make up for losses in physical CD sales. In 2005, the digital music market in Canada was valued at only \$18 million (Canadian Independent Record Production Association, n.d.).

The greatest impact of declining record sales has been on major music labels, which are “by far the largest investors in Canadian music” (FAD Research, 2004, p. 14). However, it

is important to distinguish between lost revenue for major recording labels and lost revenue for artists. In his keynote speech at the Western Canadian Music Awards in 2006, Peter Jenner, the producer and manager of Pink Floyd throughout most of their career, argued that solutions to the changes in technology must serve artists.

Artists, management companies and independent labels are developing innovative responses to declining record sales. A few examples are: licensing agreements with firms engaged in the production of film, television and even video games; development of specialized music products; and promotional strategies in which recorded music is not sold but given away to entice music consumers to spend their money on live performance admission, merchandise, fashion and more.

In 2003, global ring tone sales amounted to \$3.5 billion US. Specialized music products like business to business licensing opportunities and give-away CD sets accounted for \$2 billion globally in the same period (Stein-Sachs, 2006, p. 5 and 29). These alternative revenue sources are increasingly important to an artist's income.

Music Industry Support

This review investigated music industry development models employed internationally and across Canada. A few notable models are discussed here.

International

Throughout the course of this review, consultation participants spoke highly of music industry development initiatives undertaken in Ireland in 1994 and in New York City in 2005. Investigations into the music industry in these two jurisdictions uncovered several common threads, including the benefits associated with: encouraging entrepreneurship; improving market access; adapting to changing technologies; increasing opportunities for collaboration within the music industry; increasing collaboration between industries; and addressing systemic financial barriers (Simpson Xavier Horwath Consulting, 1994 and Mt. Auburn Associates and Center for an Urban Future, 2005).

The Irish music industry development model involved sweeping changes to the federal tax system. While tax reform has contributed to the overall success of the Irish music industry, similar suggestions for the Canadian tax system are beyond the scope of this review and outside the jurisdiction of the Government of Saskatchewan.

Federal Support in Canada

At the federal level, support for the music industry is provided by a variety of agencies. Support for both creative and professional development is available at the federal level.

Government of Canada

The Department of Canadian Heritage oversees policies and programs designed to strengthen Canadian arts and culture. It develops policies relating to independent public

agencies like the Canadian Broadcasting Corporation (CBC) and the Canadian Radio-television and Telecommunications Commission (CRTC).

The Government of Canada also provides direct financial support to the music industry, in the form of grants from Canadian Heritage to support entrepreneurship and market access. Foreign Affairs and International Trade Canada (DFAIT) and Canadian Heritage collaborate to support international trade in the cultural industries.

The Canada Council for the Arts

The Canada Council for the Arts is a non-profit agency that operates at arm's-length from the federal government. It supports the development of the arts on a nation-wide scale.

Artists in the music industry can access Canada Council grants for artistic development, and for such professional activities as sound recordings, tours, festival programming, concert productions, and compositions. The Canada Council also supports audience and market development.

FACTOR (The Foundation Assisting Canadian Talent on Recordings)

FACTOR is a non-profit agency that administers federal government funds to support the development of Canada's independent recording industry. FACTOR also collects funds from private radio broadcasters for distribution through its programs.

FACTOR supports recordings artists and songwriters in all stages of record production, including marketing and promotion. It supports the development of industry professionals, including record labels, recordings studios, video production companies, producers, directors, distributors and engineers.

CAB (Canadian Association of Broadcasters)

The CAB represents private broadcasters in radio and television. It administers the Radio Starmaker Fund, which provides financial support to Canadian rising stars for marketing and promotion of Canadian music recordings.

SOCAN (Society of Composers, Authors and Music Publishers of Canada)

SOCAN is a non-profit corporation, which collects licence fees for the public use of music within Canada and ensures that creators and publishers receive royalties for all music used in Canada in accordance with the *Copyright Act*.

AFM (American Federation of Musicians)

The AFM is a union representing the interests of professional musicians throughout Canada and the United States. It provides legal support, low-cost insurance, an employer-funded pension plan, and assists artists on tour in Canada and the USA. Two of the AFM's 250 locals (Regina 446; Saskatoon 553) are located in Saskatchewan.

Provincial Support in Canada

Two Canadian provinces, Quebec and Manitoba, have well-established music industry development strategies. A brief summary is provided below.

Quebec

In Quebec, the music industry is supported by organizations whose mandate includes all of the cultural industries. Originally, cultural industry development in Quebec had an inward focus: to ensure the vitality of the Quebecois language and culture. However, cultural industry supports in Quebec have since evolved to recognize the importance of commercial enterprise and export. Quebec's willingness to capture markets outside of the province resulted in a thriving music industry.

CALQ (Conseil des arts et des lettres du Québec)

CALQ is a Crown corporation that offers bursary and grant programs to support artistic development. It ensures that support is available to professional artists in each region of Quebec for artistic creation, production, experimentation and training.

SODEC (Société de développement des entreprises culturelles)

SODEC, also a Crown corporation, maintains a focus on the financial and entrepreneurial aspects of the cultural industries, offering both direct and indirect assistance to cultural enterprises. Among the services provided directly to cultural business, by SODEC, are: marketing and export consulting services; and the provision of financial tools, including loans, revolving credit and loan guarantees. On behalf of government, SODEC administers tax measures, government assistance, investment and subsidy programs.

FIDEC (Financière des entreprises culturelles du Québec)

FIDEC was established by SODEC in order to provide gap financing,¹ make equity investments and finance capital-intensive projects.

Manitoba

Collaboration is at the foundation of the music industry development model in Manitoba. Structural supports encourage the natural relationship between the film and music industries. At another level, the structure supports the recognition that creative talent, production talent and markets in places other than Manitoba cannot rely on critical mass of are essential to the commercial success of the Manitoba music industry. Like Saskatchewan, Manitoba cannot rely on critical mass of population to develop music markets as is the case in Toronto and Vancouver, which are recognized as centres of music production.

¹ Gap financing is a bank guarantee evaluated according to the sales potential of the product in international markets.

Manitoba's model of cultural industry development is focused on business development and commercialization. This relentlessly commercial approach has resulted in a music industry that inspires Manitoban pride.

A recent economic impact study of Manitoba's music industry found that the direct and indirect effects of the Manitoba music industry on the province's \$40.2 billion GDP in 2004 was \$87.2 million (Kisquared, 2005, p. 7). When the induced effect (individual spending enabled by the payment of wages) is calculated, the total impact of the music industry was \$125.1 million (Ibid). The study estimated that the total economic impact of the music industry exceeded the economic impact of the province's film industry. While the study was unable to provide a comparison to previous years' impact on the GDP, it suggests that Manitoba's music industry is a strong economic engine.

MFS (Manitoba Film and Sound)

MFS was established as a statutory corporation of government by *The Manitoba Film and Sound Recording Development Corporation Act*. It provides financial support for touring, marketing and music video production. It also offers forgivable loan programs. Eligibility requirements for MFS programs relate to business planning, marketing and promotion strategies, and evidence of past independent recordings or contracts with labels, distributors or retailers. MFS supports grant and loan applicants in the development of these materials.

MARIA (Manitoba Audio Recording Industry Association)

MARIA is a membership-based organization serving musicians and industry professionals. It has a strong Aboriginal engagement program. MARIA supports the industry by providing: information; advocacy; education; communication services; and a resource centre with meeting and work space. MARIA assists music industry professionals in developing business plans and writing grant proposals. It offsets costs for attendance at showcases, music conferences and other industry related events, and promotes its members at key festivals and showcases.

The Music Industry in Saskatchewan

A 1994 study on Saskatchewan's music industry estimated that there were 2,780 people employed in Saskatchewan's music industry: musicians, songwriters, music educators, publishers, managers/agents, producers, labels, studios, recording engineers and technicians, publicists, distributors, broadcasters, media, retail outlets, and nightclubs (Balcon, 1994, p. 30). Of that number, 1,200 were paid musicians, songwriters, singers and composers (Ibid, appendices).

Financial Support Structures

According to CYR calculations based on 2003 Census data, federal funding for the arts in Saskatchewan was the second lowest across Canada (\$31 per capita), followed only by Alberta. Saskatchewan, on the other hand, spends more on the arts (\$36 per capita) than almost any other province.

In Saskatchewan, a number of organizations support our local music industry. For many years, these organizations have been working hard to create an environment in which music can thrive.

SaskMusic

SaskMusic, formerly known as the Saskatchewan Recording Industry Association (SRIA), is a membership-based non-profit corporation. Similar to Manitoba's MARIA, its efforts are focused on the development and promotion of Saskatchewan music, artists and industry professionals.

SaskMusic receives financial support from Saskatchewan Lotteries through SaskCulture Inc. As a member of the Cultural Industries Development Council, it receives funding from Saskatchewan Culture, Youth and Recreation through the Cultural Industries Development Fund (CIDF).

CIDC (Saskatchewan Cultural Industries Development Council)

The CIDC was established by the Government of Saskatchewan in 1997 to further the development of the cultural industries. The CIDC, entrusted with the management of the CIDF, has six member organizations: SaskMusic, the Saskatchewan Motion Picture Association (SMPIA), Canadian Artists' Representation/Le front des artistes canadiens (CARFAC) Saskatchewan, the Saskatchewan Craft Council (SCC), Saskatchewan Professional Art Galleries Association (SPAGA) and the Saskatchewan Publishers' Group (SPG).

The CIDC, in co-operation with the Government of Saskatchewan, produced a strategy for the development of the cultural industries in 1997. For a variety of reasons, this strategy has not been successfully implemented.

SaskCulture Inc.

SaskCulture distributes lottery funds throughout the cultural sector. It is the umbrella organization which provides annual operating funds to SaskMusic and the other cultural industry associations: SMPIA; CARFAC; SCC and SPG. In total, it supports the annual operations of 31 non-profit, community-based organizations. Through a number of application-driven funding programs SaskCulture supports community-based cultural activities that focus on: arts; heritage; multiculturalism; Aboriginal; and cultural industries.

SaskCulture is currently conducting a review of its funding priorities. The review is nearly complete, and an implementation strategy is scheduled for early 2008.

Saskatchewan Arts Board

The Saskatchewan Arts Board, established in 1948, was the first arts funding organization in North America to operate at arms-length from government. The Saskatchewan Arts Board's relationship to government continues at this distance, as confirmed by *The Arts Board Act, 1997*. The Saskatchewan Arts Board supports music as part of its broad mandate to support the arts in Saskatchewan.

The Saskatchewan Arts Board provides annual operating funds to arts organizations and offers grant programs to artists for development, creation and presentation. Its efforts ensure that there is a thriving arts community in Saskatchewan.

Collaboration

During Phase I and Phase II consultations, strong support was shown for the existing organizations that support Saskatchewan's music industry. However, participants also noted that greater collaboration is needed between music associations and organizations, other cultural industries, government and other businesses in Saskatchewan. CYR's *Professionals Survey* found similar results: 26 per cent of Saskatchewan music industry professional respondents agreed that music industry organizations have close ties to other cultural industries in Saskatchewan; 23 per cent of music professionals agreed that there is a lot of collaboration among music industry organizations; and 21 per cent of respondents agreed that music industry organizations have close ties with other businesses in Saskatchewan.

Economy

The CYR *Public Survey* of Saskatchewan residents showed that 70 per cent of respondents believe that the music industry is important to Saskatchewan's economy.

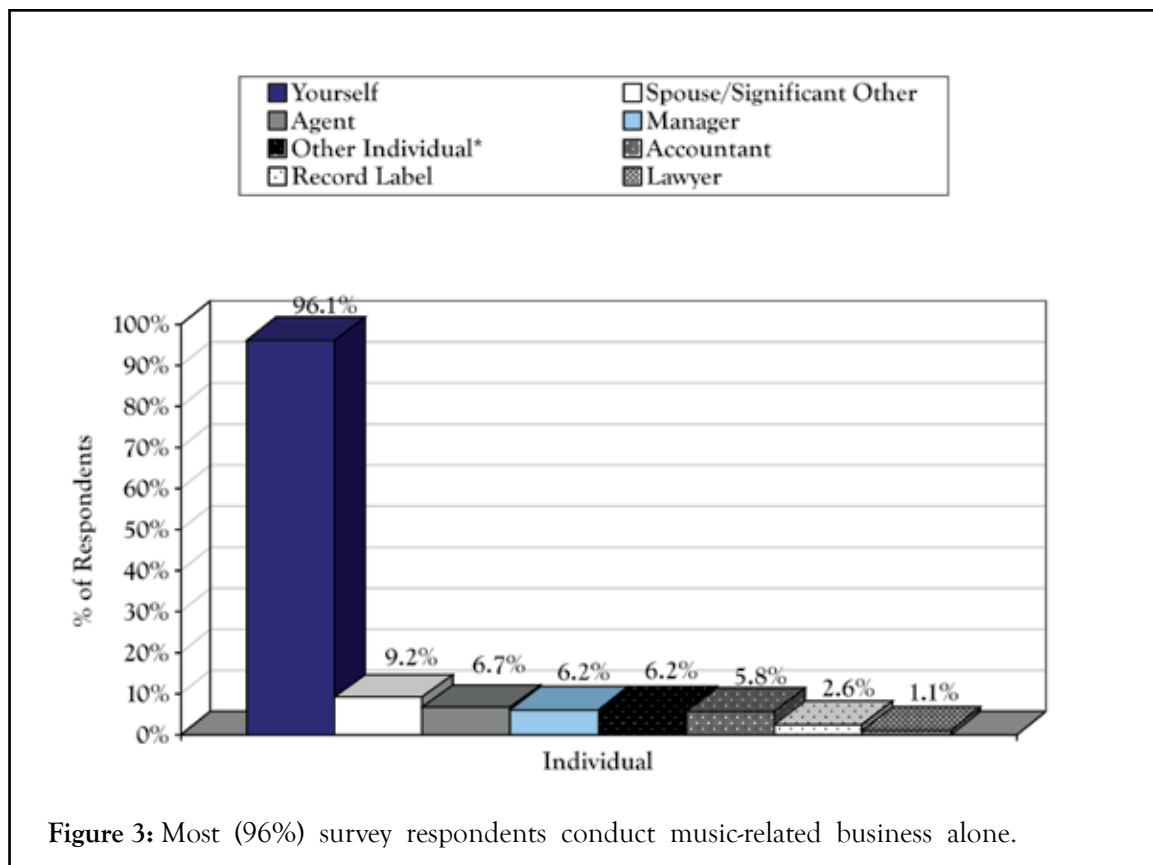
In 2003, Saskatchewan produced \$900 million in cultural output, approximately three per cent of provincial GDP (Cultural Statistics Program, 2007, p. 64). Sound recording and music publishing accounted for \$11 million of the \$900 million in cultural output; a ratio that is similar to that in Manitoba (Ibid). Assuming the economic impact of the music industry in Saskatchewan is also comparable to that of Manitoba, one can assume that direct and indirect economic impacts are close to \$64 million annually. This compares with

the economic impact of the film industry, which was assessed in 2004 as ranging from \$50 million to \$60 million annually, depending on the volume of film production. The music industry is at least as important economically as the film industry in Saskatchewan already and the potential for growth is enormous with the right mix of supports in place.

Working Conditions

The majority (56%) of Saskatchewan music industry professional respondents indicated that having a manager, agent or publicist was important. However, the majority of musicians and industry professionals conduct their music business alone. Only nine per cent of Saskatchewan music industry professional respondents were satisfied with the opportunities in Saskatchewan to have a manager, agent or publicist to work on his/her behalf.

For the purpose of CYR's *Professionals Survey*, music industry work was grouped in three capacities: artistic, production and distribution. Ninety per cent of respondents reported working in an artistic capacity; 49 per cent worked in distribution and 48 per cent worked in production. Those who work in the music industry are versatile – they played, on average, five different roles in the industry.



Income

According to CYR's *Professionals Survey*, in 2006, the average music-related income reported by music industry professionals in Saskatchewan was \$13,671; the low-income cut-off² calculated two years previous for an individual living in a community the size of Regina was just under \$17,000. Only two per cent of Saskatchewan music industry professional respondents agreed that Saskatchewan musicians were well paid.

Respondents reported music-related earnings as high as \$180,000. The average reported total income from music and other activities was \$39,124; three-quarters (75%) of respondents to CYR's *Professionals Survey* supplemented their music income through outside employment.

Thirty-four per cent of respondents had received financial support in 2006, most commonly from friends or family (18%) but also as grants from a professional organization or government (13%) and as loans from a financial institution (11%). There appears to be a gap in access to small loans from financial institutions. As found in the 2006 Final Report of MACSA, "Many private investors...do not recognize intangible assets such as copyright and intellectual property as legitimate forms of security for lending purposes. In addition, some private investors may be reluctant to invest in the cultural sectors for fear of low return on investment." This gap in private financing is of particular concern. As this data indicates, few people working in the music industry are able to rely solely on income derived from working in the music industry.

Higher-earning respondents to CYR's *Professionals Survey* (reported total annual income of \$30,000 or more) with income mainly derived from music tended to work full-time in the industry. The average annual income for individuals in this group was \$57,758, of which more than 90 per cent was music-related income. These respondents were also more likely to be music educators, teachers or administrators, more likely to be involved with classical or opera music and typically received income from a wider range of music-related sources than other respondents.

Marketing

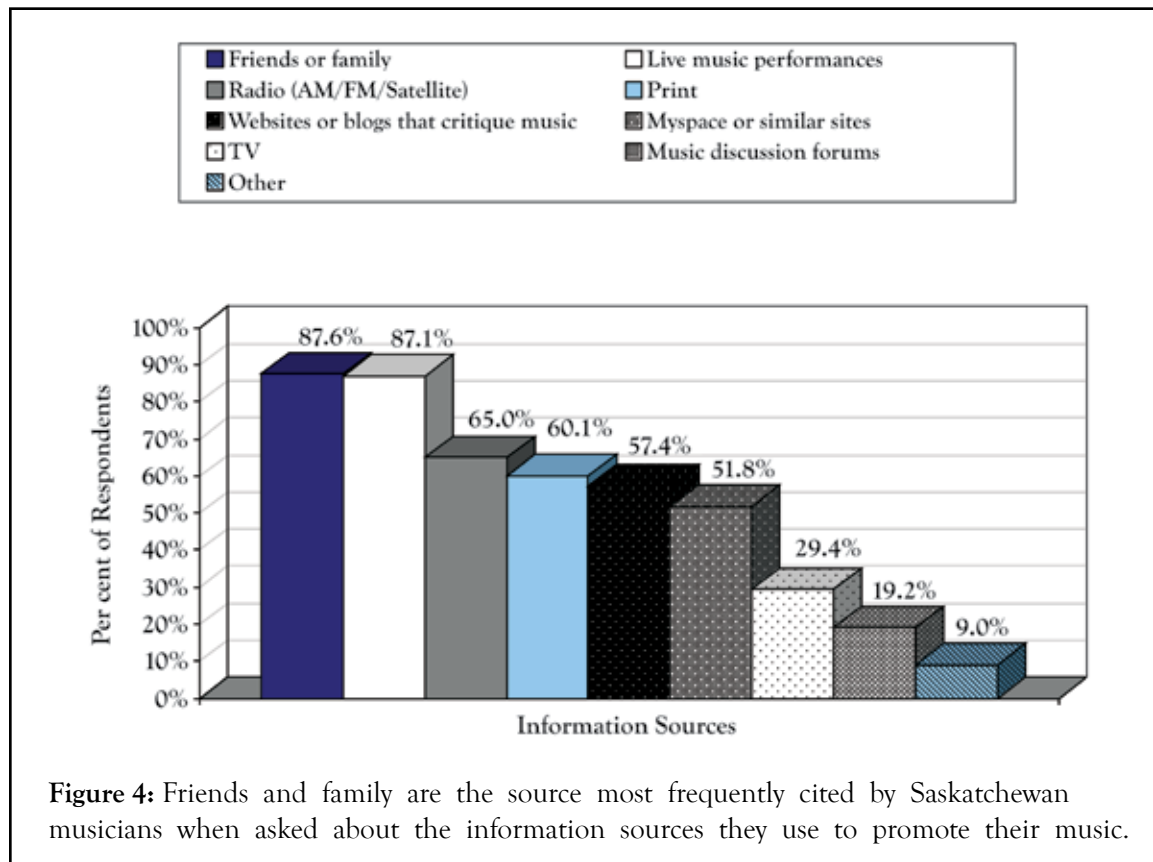
The majority of respondents to CYR's *Public Survey* reported having listened to Saskatchewan music in the last year. However, they reported difficulty discovering Saskatchewan artists and keeping up with their favourite Saskatchewan musicians.

In addition, only eight per cent of Saskatchewan music industry professional respondents agreed that Saskatchewan music is avidly promoted or marketed nationally, while only two per cent agreed that there was avid promotion or marketing internationally.

Friends and family are relied upon by Saskatchewan musicians for promotion. As illustrated in the chart below, the most frequently reported source for promotion not only of

² Low income cut-offs (LICOs) are income thresholds, determined by analysing family expenditure data below which families will devote a larger share of income to the necessities of food, shelter and clothing than the average family would.

live performances but for Saskatchewan music in general is the friends and family of Saskatchewan performers.



Digital Marketing

There is overwhelming agreement that the Internet has been good for the music industry. Professional respondents agreed that the Internet has allowed artists to reach a wider audience with their music (91%), made it easier for artists to communicate with their audiences and fans (91%) and improved artists' connections with others in the music community (91%).

The majority (59%) of Saskatchewan music industry professional respondents had their own music-related website. Forty-eight per cent of these professionals sold at least one type of merchandise on their music-related website.

Live Music and Touring

Demand for live music is high in Saskatchewan. In 2005, 20 festivals attracted 136,379 attendees; 71 per cent of performers at these festivals were from Saskatchewan. Last year, following a near-immediate sell-out of tickets to a single show on The Rolling Stones' original tour schedule, the band altered its schedule to perform a second show in Regina.

The *CYR Public Survey* found that 86 per cent of respondents indicated they value live music performances and 83 per cent of Saskatchewan residents had attended at least one live music performance in 2006. Most (76%) of these people had seen a Saskatchewan artist perform, while nearly 13 per cent had seen only Saskatchewan performers. Respondents, on average, spent a total of \$250 on live music performances in 2006.

Live performance is important for the development of musical ability, but more so, live performance is important to a musician's career and income. The majority (70%) of respondents to *CYR's Professionals Survey* reported having earned income from touring and live performance in 2006. In addition, concerts or live music performances were the most frequently cited locations where music industry professionals sold their music.

Live music performances are also essential for artists to promote their music and develop a fan base. 87 per cent of Saskatchewan music industry professional respondents identified that they use live music performances to promote their music. In addition, the majority (66%) of Saskatchewan resident respondents use live music performance to find out about new music.

Despite the importance of live music performance to an artist's career, a small percentage (18%) of Saskatchewan music industry professional respondents agreed there is a lot of support for Saskatchewan talent at major music events. Several music industry professionals also spoke of the difficulties artists have in gaining access to venues or events.

The Music Industry Review consultations echoed the results of *CYR's Professionals Survey*, in that touring and live performances are an integral part of an artist's career and that opportunities to perform live in Saskatchewan are not abundant, even in urban centres. Travel between Saskatchewan communities can be expensive. Gaps in support for touring place additional barriers on Saskatchewan musicians who wish to perform.

Record Sales

Only a third of respondents to *CYR's Professionals Survey* reported income from direct CD or DVD sales and one-third also reported having earned income royalties from performance or publishing sales.

The prevalence of free downloading and the commensurate decline in record sales does not appear to have greatly impacted Saskatchewan musicians' income. About one-fifth of respondents to *CYR's Professionals Survey* believe that free downloading had increased their income, but most felt it hadn't had any impact. Similarly, about a quarter of respondents thought that free downloading had increased either radio play or sales of their music, but the majority reported that there was no impact.

The *CYR Public Survey* found that Saskatchewan residents owned, on average, 248 pre-recorded commercially produced music products (CDs, Cassettes, Vinyl Records or DVDs) and 61 per cent of respondents reported purchasing music products by Saskatchewan artists in 2006, though less than 10 per cent of the total music purchased was by a Saskatchewan artist.

Digital Sales

Digital music consumption is increasing in Saskatchewan. More than two thirds (68%) of respondents to CYR's *Public Survey* had purchased digital music in 2006; over half of respondents had converted some of the music they owned to digital files and almost a third (32%) of Saskatchewan resident respondents purchased more than half of the music they downloaded. Many of those who had downloaded digital music had downloaded some Saskatchewan music, as the following chart illustrates.

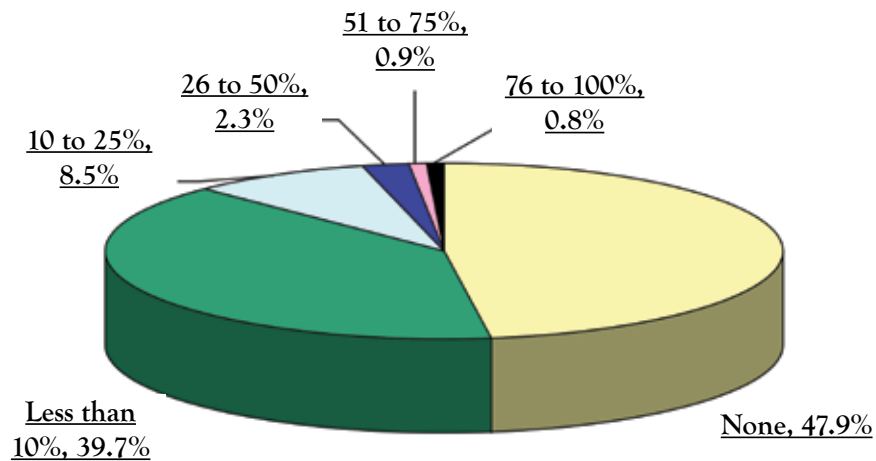


Figure 5: More than half of respondents who had downloaded digital music reported having downloaded digital music by Saskatchewan artists. 39.7% of those who had downloaded digital music reported that less than 10% of their digital music downloads were from Saskatchewan musicians.

Analysis and Discussion

Analysis and Discussion

Conclusions

At the close of Phase I of this review, the following four key conclusions about Saskatchewan's music industry were published in the *Music Industry Review Interim Report*:

1. In Saskatchewan's music industry, there is an abundance of talent, but gaps in professional support present a barrier to success.
2. While live performance is integral to a musician's development and income, the opportunities to perform and to tour are on the decline.
3. SaskMusic and other provincial organizations provide valuable services and support; however, they lack sufficient resources.
4. The need for increased collaboration at all levels in the music industry was identified.

Phase II of this review was informed by these four conclusions. Taken as a whole, the findings from both phases of this review suggest that there are three main barriers to music industry development in Saskatchewan. The music industry in Saskatchewan is *under-resourced, under-focused, and under-connected*.

Under Resourced

"The quality of talent coming out of this province is steadily increasing. Now, we just need industry support to take it to the next level."

"SRIA [SaskMusic] needs more money to support touring and the Saskatchewan Arts Board could use more money to support recording."

- CYR Professionals Survey Participants

Financial programs that support activities in the music industry are administered at the provincial and federal levels, addressing both creative and commercial development. In 2003, when Saskatchewan spent more per capita on the arts (\$36 per capita) than almost any other province, federal funding for the arts in Saskatchewan, was the second lowest across Canada (\$31 per capita).

At the federal level, barriers to accessing arts funding are more pronounced in Western Canada than in other regions, and appear to be systemic in nature. Juries that make funding decisions at the federal level tend to be predominantly from Eastern and Central Canada. There also tends to be fewer applications for funding from the west. Some jurisdictions are taking action. For example, in 2007, Alberta, the jurisdiction with the worst record of federal arts spending, signed an agreement with the Canada Council to work jointly to improve the situation.

Saskatchewan's high per-capita support for the cultural industries is mainly due to the Film Employment Tax Credit, one of the most generous programs of its kind in Canada.

Because Saskatchewan's support for the cultural industries is concentrated in film, it is likely that the rest of the cultural industries, including the music industry, are actually supported at a lower level than those in other jurisdictions. Saskatchewan's weak support for the music industry contrasts with jurisdictions like Manitoba and Quebec, where music industry development initiatives have taken place. The annual operating budget of SaskMusic (in the range of \$350,000) is simply not sufficient to offer the full complement of programming and maintain the staff complement that is needed to properly support industry growth. While the annual budget of MARIA, SaskMusic's counterpart in Manitoba, was unavailable for comparison, CYR has estimated that SaskMusic's budget would need to be tripled in order to accomplish the vision laid out in this report.

Further comparisons to music industry supports in Quebec and Manitoba revealed a gap in support for commercial development in Saskatchewan's music industry. Both Quebec and Manitoba have developed investment and loan programs which, in contrast to grant programs, offer incentives for the development and execution of effective business strategies. These programs have played a large role in developing entrepreneurship and the commercial success of artists and industry professionals in each jurisdiction.

Investment in commercial development for the music industry is provided by SaskMusic, through the Small Business Loans program and through a grant program. While these programs are designed to respond to the developmental and commercial initiatives of SaskMusic's members, their impact is limited by the relatively small pool of funds available. Financial resources are most often provided by musicians' and industry professionals' friends and family members, rather than by financial institutions, private investors, or grant agencies. Musicians and industry professionals who are unable to secure financing from these sources may also forfeit access to the business and planning advice offered by those channels.

In order to create an environment that is conducive to the development of a commercially successful music industry in Saskatchewan, a more strategic and comprehensive approach to investment is required. The gap in availability of investment dollars needs to be addressed, as does the gap in access to advice in business planning.

As the following case study illustrates, limited resources available to musicians and industry professionals have a direct impact on the growth of individual businesses and careers in Saskatchewan's music industry.

306 Records/O'Reilly International Entertainment: 16 CCMA Nominations

When the nominations for the 2007 CCMA Awards were announced, Saskatchewan label and artist management company, 306 Records and O'Reilly International Entertainment Management, received a staggering 16 nominations. The company and the artists it manages walked away with a handful of awards, including Record Company of the Year and Record Company Person of the Year.

O'Reilly is known Canada-wide for his success in Saskatchewan. Though he is proud of being a Saskatchewan citizen - note the name of his label, 306 Records, featuring Saskatchewan's area code - he understands that the viability of his company and the careers of his artists depend on him working nationally and internationally. His roster of artists is therefore drawn from across the country.

Hard work has been an important factor for Louis O'Reilly, who operates his company virtually on his own. Despite his tremendous success and business growth over the last five years, his business has reached a level at which expansion of the artist roster would require additional human resources.

Current resources do not easily allow for recruitment and training of new staff, and there is little support available from outside the business. The continued growth of 306 Records and O'Reilly International may therefore depend on the success of this review in finding ways to support growth in the music industry.

Under Focused

"I believe few professional musicians who do not have another income source could sustain a living by performing in Saskatchewan alone."

- CYR Professionals Survey Participant

"The content creation is working well. There's no shortage of talent and people writing great songs. That works well; it stops about there....there's no infrastructure. I mean, how many times have we seen ...great players, who get a recording, and because... they don't have the infrastructure to do anything with it, they end up with a thousand discs sitting in their garage or they move to Toronto?"

- Phase I Consultation Participant

Under-focused refers to the lack of a strategic approach to industry development, which has limited Saskatchewan musicians' and industry professionals' ability to build strong careers and to access markets. Opportunities for touring and live performance, marketing and promotion, and distribution are available through independent efforts of the private and non-profit sectors. It is likely that the lack of strategic direction in the music industry has allowed the divergent objectives of the private and non-profit delivery structures to slow industry development.

Barriers to touring and live performance are prolific. While there is clearly a market for live music in the province, it is difficult for independent musicians to secure venues, largely because venue operators are reluctant to present artists who can not guarantee a certain size of audience. Performance fees are also notoriously low. Despite the existence of collective agreements, community-based organizations and private venue operators alike are reluctant or unable to sufficiently compensate musicians for their performances.

Performers from other jurisdictions may be better able to secure a Saskatchewan venue. These performers, whose touring expenses are often offset by support from their home provinces, may require lower performance fees than Saskatchewan artists, to whom little corresponding support is available. The situation for Saskatchewan musicians on tour is compounded by the added travel and accommodations expenses.

Marketing and promotion initiatives on an industry-wide scale are carried out by the private sector in a number of ways. Indirectly, private sector initiatives such as the 10K20 initiative of Rawlco Radio provide marketing support by financing the creation of high-calibre recordings. Radio play, an important part of a musician's promotional strategy, requires that a musician create a high-quality product.

This review has identified weaknesses in music industry marketing and distribution initiatives. Consumers increasingly purchased music from big-box stores and digital retail outlets, such as iTunes. For reasons of scale, these retail outlets are largely inaccessible for Saskatchewan musicians. While digital retail tools are available to independent musicians, they are not widely used to maximum effect by Saskatchewan musicians.

Many Saskatchewan musicians approach distribution at an individual level, selling physical CDs at their live shows and on their websites. The market increasingly demands a digital approach to distribution. Two kinds of support are needed for Saskatchewan musicians and industry professionals to better meet this demand: technical support in setting up websites and engaging in commerce over the Internet, and strategic support to exploit existing technical skills and capture consumers' attention.

In addition to addressing market access barriers on a systemic level, it is important to recognize that access to larger music markets is largely a task for management-level industry professionals. Particularly at the development stage of a musician's career, the creative and commercial workloads can be managed by one individual. However, as a musician's career progresses, the workload expands such that increased success would demand a sharing of the workload. Effective outside management can increase a musician's commercial success, while at the same time allowing the musician to focus on his or her creative development.

Rob Bryanton: Worldwide Markets, Product Diversification, and the Internet

Rob Bryanton is a Saskatchewan-born composer and author, and President of Talking Dog Studios in Regina. At 12 years of age, he recorded his first album and dreamed of making it big. At his current vantage point, he has much to be proud of, including several Gemini award nominations for sound. He has contributed his skill as a composer and sound mixer to a number of successful television productions, including “Corner Gas”, which recently entered the USA cable market.

In July 2006, Rob launched his independent creative project, The Tenth Dimension. The project presents Bryanton’s philosophical ideas in various formats: book, website, electronic media, short animation, and song. The website, www.tenthdimension.com attracted almost two million unique visitors in its first year, with virtually no expenditures on advertising or promotion. Bryanton’s Internet marketing savvy has helped him overcome geographic barriers; he has attracted attention, and paying customers, from all over the world.

“What I’ve created is unusual, and not everybody’s cup of tea,” says Bryanton, “but that’s why accessing a worldwide market is so important, and that’s true no matter what creative avenue you’re pursuing. Even if a project only appeals to one in every thousand people, there are now a billion people on the Internet: and that one in a thousand translates to an audience of a million!”

Under Connected

“It is important to establish a single voice for the industry when building relationships. These relationships cannot be achieved by individual artists acting on their own, but rather there needs to be a centralized approach.”

“When the community works together, there’s a synergy that’s unstoppable.”

- Phase I Consultation Participants

“There is a need [for] better communication...with those who are able to and want to [support] people with ability to perform”

- CYR Professionals Survey Participant

During this review, the music industry revealed itself to be insufficiently connected, both at the level of industry support and at the individual level. Strategic communication with other sectors of the economy is just as important to the development of the music industry as it is within the industry.

The music industry lacks vehicles for strategic communication with government, other sectors of the economy, and within the industry itself. The consultations undertaken as

part of this review have laid the groundwork for improved communication with each identified sector, but there is still much to be done.

The time is right to take advantage of opportunities for collaboration with other industries. There are obvious opportunities for commercial partnerships with the tourism and film industries. Commercial collaborations with other sectors could be explored as well. SaskMusic, as the representative of the music industry, is uniquely positioned to search out opportunities to collaborate with businesses in other industries.

As the music industry develops, it becomes increasingly important to ensure that connections are made within the industry as well. Increased connections at the delivery level would address cultural diversity, among other priorities. In addition to SaskMusic, there are parallel support structures for francophone musicians and industry professionals, and Aboriginal musicians and industry professionals. This has resulted in the development of three parallel music industries in the province, with three parallel markets, and minimal sharing of resources, supports, infrastructure, or expertise. This is illustrated in the following case study using the example of Aboriginal music development.

Aboriginal Music: Economically and Socially Important

Aboriginal music in Saskatchewan as a commercial enterprise has developed in the last 30 years. Some of the most well-known Saskatchewan artists have Aboriginal roots: Andrea Menard, Eekwol, and Donny Parenteau. Other Aboriginal artists, such as Ray Villebrun and his band Red Blaze, have carved out loyal niche followings, but are largely unknown in the mainstream.

Saskatchewan boasts two Aboriginal recording labels. Both Sweet Grass Records and Turtle Island Music have received national and international recognition. They have capitalized on niche markets by producing traditional, Powwow and round dance music, and have also produced contemporary Aboriginal artists.

The Missinippi Broadcasting Corporation (MBC) Network Radio, with main studios in La Ronge, play a large role in the development of Aboriginal music markets, broadcasting to 70 Saskatchewan communities. The MBC's audience is largely made up of Aboriginal listeners.

While Aboriginal musicians and industry professionals have achieved great success in Aboriginal markets, only a handful have received broader recognition. As bridges between the Aboriginal and mainstream music development structures are built, the path to accessing supports, infrastructure and expertise in each model will become more clear from the outside.

There is considerable room at the individual level to improve collaborative opportunities. Collaboration between musicians can be advantageous on a creative, as well as on a

commercial level. There is a long history of creative collaboration in music, which helps to develop new sounds or to attract new audiences. Attracting new audiences today has a decidedly commercial feel. Musicians, in order to make money at music, must now consider declining CD sales and the changing face of those who purchase their music.

Declining CD sales means that less music is being sold directly to those who listen to it. Business-to-business music sales and licensing agreements are becoming a very important part of a musician's revenues, but opportunities to access these 'alternative revenue sources' must be actively pursued.

It is through collaboration with professionals in the music industry and in other industry sectors that opportunities to harness alternative revenue sources are discovered. The following case study illustrates the importance of building professional relationships on an individual level with others in the music industry and in related industries.

David J. Taylor: Full-Time, Diverse Work in the Music Industry

According to David J. Taylor the "new" music scene is not just about "getting in a band, touring around, and cutting a record. Those days are over." To be successful in the music industry, an artist must immerse himself in the industry.

Taylor began his music career 15 years ago in Vancouver as a freelance record producer/engineer/mixer and recording artist/songwriter. In 2000, he moved to Saskatchewan to take a position as a Foley recordist/artist with Talking Dog Studios in Regina. In addition to his freelance pursuits and his Foley work, Taylor is also the music supervisor for a locally produced television show called *renegade*press.com. In a world where most artists have 'day jobs' to support their music, Taylor's day job is music.

Taylor's professional relationships in the film and music industries complement each other to mutual benefit. As he notes, an artist who wants to record an album can easily afford such a venture by securing a few song placements, "as it is then less about scrambling to pay the bills and more about working on yourself as an artist and staying immersed in the industry." Taylor credits his full-time engagement in diverse roles in the music industry with the success of his career in Saskatchewan and beyond.

Recommendations

Recommendations

In 2007, the four major music events in Saskatchewan captured the attention of the music industry across Canada and internationally. It helped focus attention on the strength of the music sector and our artists. It is not easy to build this kind of momentum and it is important now to keep it going. The implementation of the recommendations presented in this report will create an environment in which Saskatchewan's music industry will see new levels of success and recognition.

In this inquiry of the music industry, it became clear that the challenges of insufficient resources, focus and connection are not specific to the music industry. In fact, all of the cultural industries share these challenges. This conclusion has led to an approach to the recommendations that moves far beyond the music industry alone.

The recommendations, therefore, are presented in two parts. The first part provides a strategic direction for the development of the music industry, while the second part outlines a strategy to address issues common to all of the cultural industries.

Overall, the recommendations are based on the adoption of a highly entrepreneurial model to strengthen the business practices of the industry and ensure greater accountability. The recommendations incorporate the effective business models of Quebec and Manitoba, and respond to the unique circumstances of Saskatchewan.

Part 1 – Music Industry Development

Infrastructure and Career Development Support

1. Strengthen the role and resource base of SaskMusic and capitalize on its credibility in supporting professional and industry development.
 - a. Increase member access to supports and services, including enhanced capacity to engage and provide services to Aboriginal and francophone artists and industry professionals. Services and supports would include, for example copyright management, contracting, promotion, marketing, business plan development, audience building, accessing alternative revenue streams, identifying financial resources available, and assistance with the development of grant applications.
 - b. Develop a distribution and marketing strategy to promote local musicians in and out of Saskatchewan; provide enhanced presence at tradeshow both within and outside the sector; ensure greater media engagement and the provision of information to talent buyers and major event producers, to support career development opportunities for musicians and linkages with lucrative alternative revenue streams.
 - c. Establish a career and business development program, supported by an advisory process, to assist with the identification of career development, human resource

development and capacity development priorities for the music industry. Some of the program components would include:

- Music manager internship to address the scarcity of individuals with the skills, expertise and experience needed to manage the music careers of artists.
 - Business skill and professional development improving on current services targeting artists and other industry professionals to enhance marketing skills, merchandizing and harnessing of alternative revenue streams.
 - Building on the partnership with University of Saskatchewan Center for Continuing and Distance Education (CCDE) develop Canada's first University Music Industry Certificate Program to enhance the availability of career-relevant educational opportunities.
- d. Establish a Music Industry Resource and Technology Center for musicians and other industry professionals to enable them to access meeting space, creative space, a lounge, a resource library; and workspace equipped with computers, software, and Internet. Resource Centre staff would offer professional expertise, technical support and strategic, current advice on marketing and distribution.
- e. Provide career pathing support for young artists choosing to pursue a career in music and the arts, building on successful programs such as the Artist in Residence Program and ArtSmarts, co-led by SaskMusic, SaskCulture and the Saskatchewan Arts Board.
- f. Explore the expansion of music, arts and cultural programming available for children and youth, particularly those most vulnerable, co-led by SaskMusic, SaskCulture and the Saskatchewan Arts Board in partnership with the human services sector.

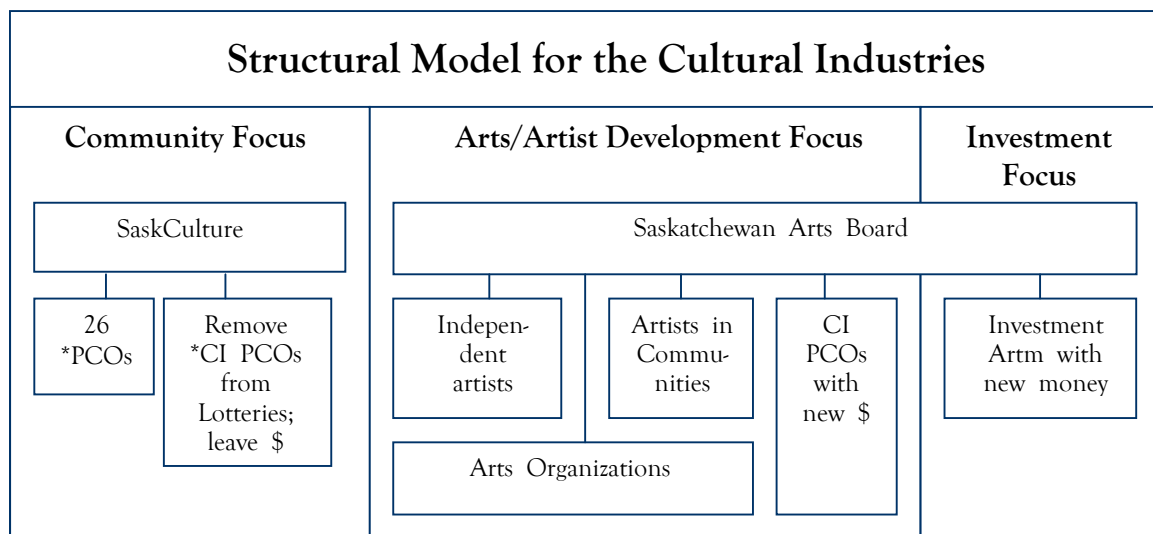
Part 2 – Cultural Industry Development

Delivery Structure

2. Situate responsibility for commercial support in the arts and cultural industries within the Saskatchewan Arts Board, and enhance its resource base accordingly. Capitalize on its existing relationships with artists and cultural industry professionals.
- a. Align responsibility for operational support to the cultural industry associations (SaskMusic, the Saskatchewan Motion Picture Association, CARFAC Saskatchewan, the Saskatchewan Craft Council, and the Saskatchewan Publishers' Group) with the responsibility for commercial support.
- Use Lottery resources that supported the cultural industry associations to enhance support for those cultural activities remaining in the Lottery system.

- b. Increase access of mainstream cultural industry supports by ethno-cultural artists and increase the level of expertise associated with ethno-cultural art forms.
- c. Improve accessibility to CYR's support for cultural industry development through the CIDE.
- d. Develop an investment and loans office that would address the gap in financial assistance in the form of loans and/or equity investments for small cultural enterprises, to complement the business loan program provided by SaskMusic and Saskatchewan Regional and Co-operative Development.

The chart below provides a graphic representation of the recommendations proposed above:



* Provincial Cultural Organization
Cultural Industry

Market Access

3. Provide the Saskatchewan Arts Board with the resources to develop and implement a comprehensive touring support program, building on the recommendations of the Minister's Advisory Committee on the Status of the Artist, 2006 Final Report.
 - a. Address barriers to touring: the expense involved and the inaccessibility of venues for live performance.
 - b. Address the adequacy of pay for artists who perform live.
 - c. Strengthen presenters' networks and touring circuits in collaboration with the Organization of Saskatchewan Arts Councils (OSAC), the Conseil culturel francsaskois (CCF) and the Saskatchewan Cultural Exchange Society (SCES), and the recently established Aboriginal Music Association of Saskatchewan.

4. Partner with private and public broadcasters to increase the prevalence and recognition of Saskatchewan talent.
 - a. Recognize the significant role played by the Saskatchewan Communications Network (SCN) as a public broadcaster in the film and music industry sectors.
 - Enhance the resource base of SCN to increase its inventory of locally produced programming to enable the production of Saskatchewan cultural products to be sold on the world television, video and satellite marketplace.
 - Explore ways in which broadcast media could be incorporated into the marketing and distribution of music and other cultural products, co-led by SCN, the Saskatchewan Arts Board and SaskMusic.
5. Review the Festivals Grant Program through SaskCulture and the Saskatchewan Cultural Exchange Society.
 - a. Strengthen the role of the music and cultural industries in economic, civic and tourism development.
 - b. Address the unique needs of long-standing and established festivals and ensure the financial stability of festivals.
6. Develop a hosting policy framework to provide guidance to government for evaluating the appropriateness of provincial support for and to assess the economic and social impacts of large scale music and cultural events.
 - a. Ensure that economic impact of the event is part of funding transparency and accountability measures.

Branding, Marketing, Distribution and Export Activities

7. Develop a branding, marketing and distribution strategy for Saskatchewan cultural products and performances led by the Saskatchewan Arts Board, in collaboration with cultural industries, tourism, Saskatchewan product branding and export associations.
 - a. Examine existing branding programs offered by Saskatchewan Regional Economic and Co-operative Development and the Saskatchewan Food Processors Association for applicability to the music and cultural industries.
 - b. Work with the five cultural industry associations in the development of sector strategies to ensure each industry is well positioned to capture, local, national and international market share.
 - c. Build on the success of film and engage government, the Saskatchewan Trade and Export Partnership (STEP), Trade Team Saskatchewan and other partners in the development of export markets for all cultural industries.

Policy Changes

8. Work with key partners to establish principles for the development of tax incentives and investigate other options to further support music and cultural sectors, led by CYR.
 - a. Consider the following principles to inform the development of taxation options to encourage the development of the music industry:
 - Encourage entrepreneurship among artists and industry professionals;
 - Cause the hiring of and/or investment in Saskatchewan artists;
 - Facilitate private sponsorship of the arts in the context of business expenses; and/or
 - Provide general support to Saskatchewan artists.
 - b. Develop a strategy to advance the interests of artists with national funders.
 - c. Develop a strategy to encourage private sector initiatives to support the development of high calibre recordings and to increase Saskatchewan presence in the public and private media, including co-operatively owned community radio.
 - d. Review wages of music and cultural industry sectors and build on the work of other government departments in addressing salaries in the community-based organization (CBO) sector.
 - e. Work with the Saskatchewan Housing Corporation to explore options that support the low-income and affordable housing needs of artists to enable low-income artists to have spaces where they can live, work and create.
 - f. Investigate mechanisms to align support for heritage conservation, cultural economic development and tourism, perhaps through the Saskatchewan Heritage Foundation.
9. Develop outcome measures to chart the progress and success of the music and cultural industries, led by CYR with its partners.
 - a. Consider measures such as increased economic activity, improved recognition of musicians, increased presence at the national and international levels and increased ability to obtain funding and recording contracts.
 - b. Develop funding and accountability measures in partnership with the Saskatchewan Arts Board and SaskMusic.

Implementation

10. Establish a Saskatchewan Music Industry Panel, modelled after the Saskatchewan Construction Industry Panel, to facilitate the formation of key industry relationships for the implementation of recommendations in this review, co-led by CYR and the music industry.
 - a. Promote strategic communication within the music and cultural industries and government.
 - b. Identify priorities and strategically plan for the development of the industry.

Appendix 1

Saskatchewan Music Industry Review

Appendix 1: Stakeholder Consultation - Phase I: Small Group Discussions Participant Feedback and Summary Themes

Prepared for:
Joanne Crofford, Legislative Secretary
and
Saskatchewan Culture, Youth and Recreation

Submitted by:
Do Process Facilitation Services
Susan Nurse and Valda Dohlen

November 15, 2006

INTRODUCTION

In May 2006, Premier Lorne Calvert appointed MLA Joanne Crofford as Legislative Secretary of the Music Industry Review. As part of Phase I of this initiative, Saskatchewan based music industry leaders – musicians, industry representatives, venues, provincial organizations and other stakeholders – participated in eight small group discussions conducted in four cities in October and November 2006. This report summarizes the central themes emerging from these facilitated discussions.

The purpose of these discussions was to explore the state of the music industry and what is important to stakeholders for its future development, particularly given the major music events coming to Saskatchewan in 2007 and the momentum these events will create. The small group discussions were designed to gather data to inform interim recommendations which Legislative Secretary Crofford will present to the Premier and the Minister of Culture, Youth and Recreation (CYR) in November 2006. As well, the information will inform the design of research instruments to be used in the next phase of the examination.

Legislative Secretary Crofford desired an informal dialogue among stakeholders. While the purpose of discussions was not to reach consensus, in the themes presented below estimates of agreement or disagreement are noted where possible. Such notations are based on transcript analysis and facilitator observations.

METHODOLOGY

Small group discussions were selected as the method to gather data for Phase I of the examination because they are an effective way to target people or organizations that have specific interests, expertise or concerns about the industry. Facilitated small group discussions allow all participants to engage in an in-depth dialogue on industry issues. Drawing on different backgrounds and expertise, discussions emerge based on the interests of participants and their interactive dialogue is the data.

In early October 2006, facilitators Susan Nurse and Valda Dohlen met with Legislative Secretary Crofford and Heather Ritenburg, CYR Policy Analyst, to review background to the industry review, including goals of the Phase I research and an initial series of questions.

Using this information, the facilitators drafted a question guide to focus the discussions at each small group session. This guide was developed in consultation with the department and had their input and approval before the first session (see Appendix A). The main topics of the question guide were:

- state of the music industry in Saskatchewan
- 2007 musical events in the province
- impact of technology on the industry
- fostering growth in the industry through taxation incentives
- envisioning a vibrant music industry in the future

In total eight discussion groups were held:

- three in Regina
- three in Saskatoon
- one in Prince Albert
- one in Moose Jaw

Each small group discussion had the following structure:

- The facilitators welcomed participants and explained:
 - roles of facilitators, observers* and participants
 - introduction of observers
 - conduct guidelines for the discussions

* Observers: Legislative Secretary Joanne Crofford attended every small group discussion. Heather Ritenburg, CYR Policy Analyst attended Regina, Saskatoon and Moose Jaw sessions. Linda Paidel, CYR Communications Consultant attended two Saskatoon sessions and the Prince Albert and Moose Jaw sessions to assist with media coverage. Dawn Martin, Executive Director, Culture and Heritage Branch, CYR, attended the Prince Albert session.

- Legislative Secretary Crofford gave a brief presentation to the participants covering the following:
 - welcome and background;
 - purpose of the small group discussions; and
 - review of the consultation strategy as a whole.
- This was followed by a round of introductions. Participants were asked to give their name and their organization (if applicable) and to share one positive highlight of their experience in the Saskatchewan music industry.
- Facilitators then initiated and guided the group discussion using the question guide.
- Each group discussion was closed with a round asking participants to identify one short-term recommendation.
- Exit cards were distributed at the end of each session, providing participants with an opportunity to identify priorities from the discussions and potential research topics and informants for Phase II. This information was gathered to supplement the discussions and is available in Appendix B.
- Participants were also invited to contribute any further reflections on the topics explored directly to Legislative Secretary Crofford via email.

SAMPLE

Working from a list of industry “leaders,” Saskatchewan Culture Youth and Recreation maintained responsibility for selecting and inviting participants to the small group discussions in each location. Participants were chosen primarily for their background and

experience. They were from all areas of the music industry including musicians, promoters, technicians, venue operators, festival organizers, recording studios, media outlets, and non-profit organizations.

In total, 87 industry representatives participated in the small group discussions. Most groups had a representatives mixture of participants based on industry role, experience, age and gender. Two groups (Saskatoon afternoon and Prince Albert) had all male participants. Aboriginal industry leaders attended meetings in Saskatoon and Prince Albert.

The following is a breakdown of participant numbers:

Session One: Regina afternoon - 11
Session Two: Regina evening - 8
Session Three: Regina morning - 10
Session Four: Saskatoon evening - 13
Session Five: Saskatoon morning - 14
Session six: Saskatoon afternoon - 8
Session Seven: Prince Albert afternoon - 11
Session Eight: Moose Jaw morning - 12

RESULTS

QUESTION #1: WHAT'S WORKING WELL?

To build a vision for the future of the Saskatchewan Music Industry, it's important to examine where we are today. Thinking of the industry as a whole, what's working well in Saskatchewan?

Feedback

Considering the role of government, provincial organizations, and the private sector, participants were asked to share their thoughts on what's working well in the province and what challenges the industry faces. The following four themes emerged in the majority of group discussions:

1. Abundance of talent – lack of professional support

Most participants agreed that Saskatchewan is home to many talented, creative musicians. It was noted in every group however, that what is lacking is the corresponding industry structure to support them, including managers, agents, labels, publicists, distributors. The art is there. The business framework required for an industry to flourish is missing. Several groups added that the training opportunities to fill this void are also missing and that mentoring can and should play an important role in this regard.

“The content creation is working well. There's no shortage of talent and people writing great songs. That works well; it stops about there....there's no infrastructure. I mean, how many times have we seen guys, great players, who get a recording,

and because, and because they don't have the infrastructure to do anything with it, they end up with a thousand discs sitting in their garage or they move to Toronto?"

2. Touring and live performance – lack of venues

It was generally agreed that touring and performing live is an important and effective means for artists to hone their talents. It also builds an "appetite" for live music throughout the province, and, as such, helps to build a culture that appreciates the music industry in general.

While discussing the benefits of touring, almost every group noted the lack of venues and opportunities to tour. Although festivals were sited as important showcasing opportunities, it was generally felt that more could be done to build the industry with new venues. It was also noted that provincial touring poses an economic challenge for both artists and communities, and financial support is important to ensure it thrives.

"And I don't know if you remember, like, the '70s the '80s, I mean, you know, we were all playing in rural Saskatchewan, there was all kinds of town hall dances and stuff going on, and now there is just nothing."

3. SaskMusic and other provincial organizations

Almost every group identified the important role SaskMusic plays in the development of the industry in Saskatchewan. It was generally agreed that SaskMusic provides an invaluable service to the industry through workshops, grants, information, networking opportunities and individual support. Other agencies were mentioned, including Organization of Saskatchewan Arts Councils, Saskatchewan Arts Board, the Saskatchewan Country Music Association, the Saskatoon Jazz Society, the Saskatoon Blues Society and the Saskatoon Musician's Association.

"I just think it's great to have somebody to refer new artists to. When people call our office, I don't have time to spend the whole day developing them or answering their questions, so I always refer them to [SaskMusic] and tell them to buy a membership right away, get their newsletters, plug in to their events or conferences, their training, and it's great. I have accessed their funding, and I just think they do a great job."

Concerns about provincial organization services focused on the lack of awareness among young, emerging artists of the support and financial opportunities available to them. As well, there was general agreement in Prince Albert that the focus of these agencies needs to expand beyond the larger centres of Saskatoon and Regina. Finally, while provincial organizations were commended for supporting the careers of emerging artists, it was noted that the resources artists need to get to the "next level" are missing.

4. Collaboration

The majority of groups discussed the success of collaborative efforts among the groups and agencies that make up the music community. By working together, the industry develops a sense of community and cohesiveness which makes their voice stronger and more effective. Whether it is festival planning or lobbying government, the ability to work together has proven most successful.

“When the community works together, there’s a synergy that’s unstoppable.”

QUESTION #2: MUSIC EVENTS OF 2007

Saskatchewan will host several major music events in 2007, which will provide a unique opportunity to build momentum in the industry. What can we do, as a music community, to best take advantage of this opportunity?

Feedback

Participants in every group recognized that the musical events taking place in 2007 will provide important opportunities to showcase Saskatchewan talent and ultimately build industry momentum in the province. There was general agreement that these events will serve to build enthusiasm for the industry among Saskatchewan residents and further build Saskatchewan music audiences. Many also agreed that the short-term strategy to capitalize on these opportunities must include a long-term vision that continues beyond 2007.

This support for the promise of 2007 was qualified with the following concerns. First, several participants identified the importance of ensuring local expertise – technical, promotional and organizational – is used for these events. Second, some participants in one group cautioned that these events may have a negative impact on the attendance at long-standing, existing events in the province, and financial support to offset this impact is important.

Three main themes developed during the discussions around 2007.

1. Showcasing

The opportunity to showcase Saskatchewan talent during the 2007 events was raised in every small group discussion on this topic. Participants identified the importance of ensuring local musicians received exposure during the events, and some participants discussed the importance of showcasing talent throughout the year as well.

The importance of and need for showcasing venues was consistently raised in this context. The lack of venues for live performance in the province is an ongoing concern for participants, and it was highlighted as a particular challenge for the special showcasing efforts that will need to take place to fully capitalize on events in 2007.

“We do not have a lot of high quality venues...but if we want our industry to increase, one of the basic premises is they have to have a place to play.”

2. Promotion

The need to actively publicize the events of 2007 and the role of local talent in those events was consistently identified throughout the group discussions. Many groups identified a need to maximize media coverage in all formats, including TV, radio, print and the Internet. One group suggested a compilation CD of local artists to promote across Canada, and another group envisioned partnerships with retailers to highlight local talent during each event. Two groups raised the idea of partnering with tourism agencies to draw in national and international “music tourists.” The importance of informing local stakeholders about showcasing and other opportunities these events will provide was also noted.

Some groups identified the limited media support that currently exists for local talent. This led to discussions about the need to put “grassroots” pressure on media to provide local talent with appropriate profiling. Ideas included SCN features on Saskatchewan talent throughout the year and industry spotlights through local print and radio media.

“I don’t think Saskatchewan has a clue that all these events are coming....You know, if TV would put as much hype into this as they do over the Rolling Stones, you know, maybe there might actually be something going on.”

3. Readiness

Most groups expressed concerns about Saskatchewan performers’ ability or readiness to take advantage of the opportunities that will present during the major music events in 2007. They identified the need to fund workshops or other educational sessions to provide advice on management, marketing, professional sound, and performance critiques. The need to ensure local talent has access to professional production services was also mentioned. Equipping artists with the skills, knowledge, technology and support they need to make the best of these events was a consistent theme.

“One of the things, now, that needs to be done in advance...is develop a...workshop...to enable our talent to actually make the most of these showcase opportunities. Whether that’s...getting some advice on managing, on marketing, advice from somebody that knows about performance or their sound or whatever, just so that what they are presenting at these events is the best that they could possibly be.”

QUESTION #3: IMPACT OF TECHNOLOGY

Many would suggest that, of all the cultural industries, the music industry has been most impacted by technology. How has technology impacted you?

Feedback:

Discussions on this topic covered technological advances in all areas of the music industry. Overall, there was a general opinion that technology is having a positive impact on the industry. The potential of the Internet to strengthen the music community, locally and globally was recognized. Many participants were optimistic about the opportunities these changes present and were willing to work with the advances to build the success of their industry. While most participants voiced appreciation for the way technology has changed their work, every group had participants who voiced some apprehension.

The following two themes highlight what participants saw as the positive results of technology, as well as the concerns technological changes raise for the industry.

1. Production

Participants consistently described how access to inexpensive recording software has provided artists with the means to record and produce music on their own. In addition, some artists noted that technology is a means to collaborate with other industry experts around the world in the production of their music. While any artist without the funds for a recording professional can now benefit from these changes, many participants who spoke to this point emphasized the new opportunities this has created for young, emerging artists.

While home recording technology was recognized as an unprecedented opportunity in the industry, many participants noted that there are limits to the sound and production quality of such recordings. Interestingly, this led some groups to point out that quality limits from home production technology has led to an increased value for professional recording. Having tried it themselves, “home-produced” artists come to learn the value the professional brings to the production process.

“...a lot of artists that wouldn’t normally have ever gotten to the point of coming to see me at a \$60 an hour recording studio because they have taken all these little steps at home and either have learned enough that they learned that there was a limited amount that they can do at home or they have decided, no, this isn’t for me, and you know, quit or whatever, but it really hasn’t slowed down the amount of people getting to the level of making a professional CD.”

As well, some participants recognized that technological advances in sound and recording have brought with them financial pressures for Saskatchewan’s recording companies and some venues. Staying up to date on the latest technology is an expensive endeavour, but a necessary step in order to keep local artists and draw outside artists to the recording scene in Saskatchewan.

“You know the one thing about technology is that it would be nice if they kept – they supported – kept Saskatchewan support in Saskatchewan. Because a lot times when you go for technology, they will take it outside of Saskatchewan, they will source it at other places.”

2. Marketing and Promotion

Music is a medium well suited to mass electronic distribution, and it was repeatedly noted that the Internet provides easy, inexpensive access to new global music markets. Many artists described marketing their CD's directly to consumers via their own websites or downloading sites. In most groups, an artist and/or promoter described how access to a global audience was important. For some this was particularly essential since local markets were not large enough to sustain their work in a particular niche.

In addition, talent buyers, presenters, and radio stations noted the value of the Internet for accessing and reviewing local, national and international artists. Communication between performers and these venues is now easier and more cost effective, as artists' web pages now serve as the new 'promo' pack.

"Yes, my band just had a single out and we didn't press it to CD or anything. We went to a thing called DMDS, it's a service that goes right to radio programmers at all these country stations or rock, whatever. You can designate where it goes. We just did it that route and got a great response."

In several groups, some artists expressed reservations about the learning demands new technologies present, for example, developing and maintaining a website and selling product online. Some lamented the time required to 'get up to speed' on technology, time they would rather use for creative work.

Maybe it's just my age showing here, but you know, I think there is a lot of us out there that, you know, really don't have a clue how to set up stuff like a secured website, you know, so that we can have our songs downloaded, and you know, I think there could be and probably should be some kind of educational component somewhere there for the musicians to...this is how you set up a website...or this is how you approach iTunes, or CD Baby or whoever it is....there is probably a lot of musicians out there that could use that kind of educational component."

QUESTION #4: IMPACT OF TAXATION

Provincial tax policy can have a significant impact on industry development, for example, it can provide an incentive to develop more product or an incentive to sell more product. What would a Saskatchewan Music Industry Tax Program ideally do?

Feedback

Participants in every group expressed interest in some form of government incentives to support the development of the industry. Some participants were able to identify a specific tax initiative, including models from other jurisdictions and industries. Others who were unfamiliar with tax policy preferred to frame their input in terms of a desired outcome.

Many participants noted the need to ensure that any government support is targeted to encourage the use of Saskatchewan talent.

While many ideas were discussed over the course of eight groups meetings, it is worth noting that two incentive ideas were discussed in all eight groups. These were incentives for rural touring opportunities and incentives to address the lack of venues in the province. In general, there was overwhelming agreement that these are important areas which could be addressed by the tax system.

Ideas for tax or incentive initiatives came under the following four themes:

1. Live Music Incentives to:

- increase the number and diversity of venues
- increase Saskatchewan touring opportunities
- adequately compensate performers
- offset venue costs
- enhance existing festivals and other venues
- increase Saskatchewan content in all venues

Specific ideas included:

- all age/non-licenced venues
- school-based live performances
- small town tours (Centennial model)
- amend liquor laws to encourage more live performances i.e. liquor tax rebate, venue capacity

2. Artist Incentives to:

- improve income levels
- make touring and industry travel more affordable
- reduce administrative work
- develop careers to the “next level”
- produce professional shows with local technical talent
- increase educational/training opportunities with industry experts
- demonstrate recognition for senior artists
- provide music training opportunities for low income youth
- encourage interest among youth in the arts

Specific ideas included:

- Tax exemption on artist income (Ireland model)
- Write off music business expenses against paid-employment income
- Wage sharing employee program (administrative assistance)
- Grants for artists who have a proven indication of interest from a major label.
- Summer School of the Arts model

3. Industry Development Incentives to:

- address professional gaps
- increase training and mentoring programs
- increase public and private investment
- increase employment opportunities
- foster small business development
- encourage collaboration with other industries
- develop independent labels
- offset recording and manufacturing costs

Specific ideas included:

- investment tax credit
- employment tax credit (film industry model)
- forgivable loans
- public investment through a foundation, estate planning or endowment fund
- film industry to use local musical talent
- tax credit to offset costs of CD manufacturing
- eliminate the PST for recordings

4. Promotional Incentives to:

- raise the profile of Saskatchewan talent
- increase Saskatchewan content on radio stations

Specific ideas include:

- well organized showcases at national and international music events (MRIA model)
- connect industry executives and representatives to Saskatchewan talent

QUESTION #5: ENVISIONING THE FUTURE OF THE INDUSTRY

Imagine, for a minute, it's the year 2011, and the Daily Chord is featuring Saskatchewan as a world renowned music place. As you picture it, what is it that makes Saskatchewan so successful – what does the industry look like?

Feedback

As groups discussed their vision of a strong, vibrant music industry in Saskatchewan eight themes emerged. The first three themes were discussed in all eight groups. The remaining five themes were explored in a majority of the groups. In addition, Appendix C lists successful industry models suggested for consideration in future research.

1. Saskatchewan people appreciate Saskatchewan music

In the future, people in Saskatchewan know about and appreciate the musical talent that lives here. Communities throughout the province are enthusiastic about Saskatchewan

music, value live performances and financially support their artists. People all across the province listen to Saskatchewan music in their homes and on the radio. People are proud of their artists and the industry as a whole.

2. Saskatchewan is home to a thriving music scene

In the future, Saskatchewan is “the music place” - home to many artists who have “made it” on the national and international music scene. Saskatchewan artists are confident and proving themselves on stage. There is a recognizable Saskatchewan “sound” and a thriving community of professional talent representing the diversity all music genres. Business is booming, and musicians are well paid for their talents. Saskatchewan’s success draws artists from all over the world, as a destination for world class performance and recording.

3. Collaboration and co-operation are hallmarks of the industry

In the future, collaboration plays a central role in how the industry works. Organizations are working together, and the industry is meeting as a community to share ideas. Performers have a place to gather and share ideas, success stories and advice. The industry is connected across all regions, and there is strong communication with the North and between all the urban centres. The music industry has close ties to all other cultural industries, as well as the business and sports communities. Film and sound have merged.

4. Saskatchewan is home to many live performance venues

In the future, there is an abundance of live, diverse venues in the province. Music is heard throughout the province in coffee houses, restaurants, bars, “soft seat” theaters, all age venues, non licenced establishments and diverse annual festivals. Small communities throughout the province are hosting live performances, and there is an established touring network.

5. Saskatchewan’s schools engage youth in all aspects of music

In the future, school systems throughout the province expose kids to music of all genres. Schools give all kids the opportunity to experience live music and learn all kinds of instruments. There is a thriving music curriculum in every school, including a well-funded band program and a summer school for the arts. High schools expose kids to career opportunities and prepare them for future roles in the industry. Kids are provided with the technical equipment and mentoring relationships they need to learn about and become passionate about the industry.

6. Saskatchewan has a strong professional infrastructure

In the future, artists are supported and guided in the business of the industry by professionals based in the province - booking agents, producers, promoters, and recording professionals. These professionals, coupled with world class recording facilities, support local musicians and draw national and international artists to the province. Saskatchewan music

is avidly promoted and marketed globally, with extra support for Saskatchewan talent at all major music events.

7. Saskatchewan is home to world-renowned training

In the future, there is a provincial training facility that offers multi-disciplinary training on all aspects of the industry – creative, technical and professional. Training includes exchange programs and mentoring to enhance the learning and draw on the experience of senior artists and outside professionals. This training is a critical component of the strategy to keep young people in the province and to draw people to the music scene in Saskatchewan. It provides employment opportunities and recognition for people in the industry.

8. The Government of Saskatchewan is recognized for its support of the music industry

In the future, government invests significantly in Saskatchewan's creative community, through stable budgets, tax relief and increased industry funding. Ideas for tax relief include tax exemptions for artists, recording tax credits, and radio tax credits for Saskatchewan content. Funding initiatives include grants for jamborees, local festivals and other presenters, non-taxable grants for artists, and funding to teach senior artists how to mentor. Government carefully considers how policy in other areas, such as Liquor and Gaming, affects the music industry. Government demonstrates pride in its music industry by including Saskatchewan music talent in trade missions to other regions or countries.

WRAP UP QUESTION: WHAT IF ANYTHING WAS MISSED?

What, if anything have we missed - was there something you came today wanting to talk about but it hasn't come up yet?

Group 1

- Community radio: what are things that should be done to help it thrive
- Consider the CKUA model

Group 2

- Concern about government's level of potential commitment – be bold or go home
- Have a vision for 2007 to ensure we put our “best foot forward” to build an industry

Group 3

- 2007 initiatives need to be planned with the input of industry representatives
- Ensure we showcase Saskatchewan artists throughout the 2007 events

Group 4

- Should consider incentives for business community to use local talent to produce and perform for their events

- Important that the business community recognizes the role the music industry plays for them

Group 5

- Importance of making connections: i.e. sports and cultural connections
- Include the entire cultural community

Group 6

- Sustainable funding for organizations on a five year plan

Group 7

- Creativity: fostering the development of songwriters

Group 8

- Don't omit jazz, classical and gospel music from the 2007 live performance showcases

FINAL ROUND: GREATEST IMPACT IN THE SHORT-TERM

In one sentence, what's the one thing government could do that would have the greatest impact on the development of Saskatchewan's music industry in the short-term?

Feedback

The purpose of the question was to provide participants with the opportunity to close the discussion with a final thought on a specific action item that the government could initiate in the short-term. Each participant answered individually in a round format. Four themes emerged from these rounds: funding, education, incentives, and promotion. As well, there were several suggestions which fell outside of these themes and they have been classified as "general" suggestions below. The priorities of each theme are highlighted below along with a list of specific responses and the number of times each was mentioned.

1. Funding

Funding initiatives were mentioned 30 times during the final round. Within this theme, participants placed a priority on increased support for existing events or programs, in particular SaskMusic and music programming in the school system. As well, there was support for targeted funding to fill the professional gaps in the industry infrastructure.

1. Funding program to help develop professional gap in industry infrastructure – producers, recording companies, agents, managers, etc. (7)
2. Increase current funding for existing events or programs (5)
3. Increased funding to SaskMusic (4)
4. More money to music programming in schools (2)
5. Provide recording and manufacturing grants (3)

6. Increase financial support to artists for touring, recording and operating costs - i.e. small business loans (2)
7. Infuse money into the industry before 2007 events (2)
8. Support for more and different festivals (1)
9. Support for artist hubs (1)
10. When "big acts" come to Saskatchewan, collect funds from them to invest in the development of Saskatchewan's music industry (1)
11. Require commercial media to fund industry development (1)
12. Better provincial representation on committees that distribute grant money (1)

2. Education and Professional Development

In total, education initiatives were mentioned 20 times in the final round. The need to educate young people about career opportunities in the music industry was a high priority, and typically this was discussed in the context of attracting or keeping our youth in Saskatchewan. As well, participants placed an emphasis on the need to educate artists about the business side of the industry.

13. Educate students about the opportunities in the industry (6)
14. Educate artists about the business side of the industry - how the industry works (3)
15. Establish industry training in Saskatchewan (2)
16. Establish a mentoring program (2)
17. Educate and increase awareness among artists about existing grant opportunities (2)
18. Provide teachers with the technical and financial means they need to teach students about music industry (1)
19. Music scholarships (1)
20. Establish a summer arts school (1)
21. Fund feasibility study on school of arts (1)
22. Cultural exchange program for musicians (1)

3. Promotion and Marketing

In total, promotion initiatives were mentioned 20 times in the final round. Several participants emphasized the importance of funding publicity and showcasing opportunities for the events of 2007. Most other comments related to the more general need to raise the profile of Saskatchewan talent among the Saskatchewan population in order to build strong, local audiences.

23. Fund publicity and showcasing events during 2007 (4)
24. Educate the public about Saskatchewan artists (2)
25. Fund SCN and other local media to profile Saskatchewan artists, including live performances (3)
26. Incentives for radio to broaden their play list to include more Saskatchewan content (2)
27. Mandate government initiatives to use Saskatchewan musical talent - i.e. in government ads or at government meetings (2)
28. Put together a touring show of Saskatchewan artists (1)
29. Fund community radio (1)

30. Take a leadership role in motivating people to feel proud about Saskatchewan and the music industry (2)
31. Help artists promote through the Internet to a global market – a Saskatchewan music website for local bands (1)
32. Marketing Saskatchewan talent at music events (1)
33. Pressure CRTC to require new Canadian music as part of Canadian content rules (1)

4. Incentives

Tax incentives were mentioned 17 times in the final round. Almost half of these responses related to incentives to increase live venue opportunities in the province.

34. Incentives to increase opportunities for live music – more venues to hire Saskatchewan artists and pay them well (8)
35. Investment subsidy – breaks to corporations or investors to make the investment in industry (2)
36. Give musical artists the same tax incentives as any other small business – give the arts a platform that's equal to other industries (2)
37. Tax exemption for Saskatchewan artists income (2)
38. Tax break to write off music business expenses against paid-employment income (1)
39. Incentive to help musicians hire an employee (1)
40. Remove the PST from recording (1)

5. General

41. Continue dialogue with industry and get their input into programs (1)
42. Consolidation of organizations (2)
43. Listen to and be more aware of Saskatchewan music (3)
44. Pass Status of the Artist legislation (2)

EXIT CARDS: PRIORITIES AND PHASE II RESEARCH

At the end of each small group discussion, participants were asked to complete an exit card with two questions asking them to identify priorities and phase II research. Completing this card was voluntary.

SIDE 1: Priorities

In total, there were 133 responses to this question. Because many of the participants provided more than one response on their exit card, the total number of responses exceeds the number of participants.

When asked to name the most important aspect of the group discussion, 12 topics emerged.

1. The need for government funding and tax incentives to develop the industry (25)

2. The value of promoting Saskatchewan's music industry both locally and nationally (22)
3. The value of arts education in fostering the interest and potential among youth (18)
4. The need to develop a professional infrastructure to support and sustain the industry (17)
5. The potential to strengthen the role of NGO's through consolidation and/or increased funding (10)
6. The impact of 2007 events for the industry (7)
7. The need for a long-term industry development strategy (5)
8. The importance of live performance opportunities (5)
9. The value of consultation with industry stakeholders (4)
10. The value of collaboration and communication among industry stakeholders (4)
11. The potential to use corporate funding to bolster the industry (4)
12. The marketing potential from new technology (2)
13. Other (10)

For a complete listing of responses by topic, see Appendix B.

SIDE 2: Phase II Research and Contact Names

In total there were 61 responses to this question. Because some participants did not complete this question, there are fewer total responses than participant numbers.

When asked to identify topics to be explored in Phase II, participant responses fell into one of the following categories:

1. Investigate the role that education and the school system can play in music industry career development (13)
2. Examine ways to raise the industry profile and cultivate audiences, including the role of local media (12)
3. Research how to build and expand the industry's professional infrastructure (10)
4. Evaluate the need for more live performance venues for Saskatchewan talent (6)
5. Investigate ways to subsidize the industry and encourage corporate investment (6)
6. Research how NGO's can best contribute to the development of the industry (5)
7. Develop a long-term strategy for the industry (4)
8. Other (5)

For a complete listing of responses by topic, see Appendix B

CONTACT NAMES

Finally, participants were asked to submit names of industry professionals who could serve as resource people in Phase II research. See Appendix B for a complete list of names provided.

CONCLUSION

In conclusion, the small group discussions were a successful means of gathering important information from industry stakeholders for the first phase of the Music Industry Review. Input was thoughtful, and the dialogue was rich. There was a general mood of optimism and encouragement, reflecting a belief in the potential of the industry to develop and thrive.

There was particular enthusiasm for the opportunities 2007 will bring. Participants were hopeful that the music industry – private sector, government and NGO's – would work together to take advantage of this unique opportunity to move the industry forward. There was confidence that, with collaboration, support and a strong commitment from government, Saskatchewan will become a major music destination.

“...that's why these events in the next 10 months are so important, because hopefully one of the legacies of them will be that our own population realizes how big this really is and how valuable this could be....Hopefully, and if we do it right...we have the greatest musical marketing hooks that any province has every had...”

Although the purpose of the group discussions was to inform government's direction, it is worth noting that stakeholders recognized a significant value in the discussions for themselves. Many participants appreciated the opportunity to meet with their industry colleagues, and this was reflected in a strong level of engagement at every session.

“The most valuable aspect of the session was the opportunity for the dialogue itself, which was FANTASTIC, and needs to continue.”

“I was impressed with the questions and who was in attendance – great meeting.”

APPENDICES
APPENDIX 1. A: QUESTION GUIDE

SASKATCHEWAN MUSIC INDUSTRY EXAMINATION
CULTURE YOUTH AND RECREATION

Guiding Questions:

1. To build a vision for the future of the Saskatchewan Music Industry, it's important to examine where we are today. Thinking of the industry as a whole, what's working well in Saskatchewan?

What's not working well – what challenges do you face?

2. Saskatchewan will host several major music events in 2007, which will provide a unique opportunity to build momentum in the industry. What can we do, as a music community, to best take advantage of this opportunity?

What is the role of government in supporting this opportunity?

3. Many would suggest that, of all the cultural industries, the music industry has been most impacted by technology. How has technology impacted you?

How do you think it will affect you in the future?

What is the government's role in this changing environment?

4. Provincial tax policy can have a significant impact on industry development, for example, it can provide an incentive to develop more product or an incentive to sell more product.

What would a Saskatchewan Music Industry Tax Program ideally do?

5. Imagine, for a minute, it's the year 2011, and the Daily Chord is featuring Saskatchewan as a world renowned music place. As you picture it, what is it that makes Saskatchewan so successful – what does the industry look like?

Think of a vibrant music industry outside of Saskatchewan. What makes their approach successful – what can we learn from them?

Wrap Up Question:

What, if anything have we missed – was there something you came today wanting to talk about but it hasn't come up yet?

Final Round Question:

In one sentence, what's the one thing government could do that would have the greatest impact on the development of Saskatchewan's music industry in the short-term?

APPENDIX 1. B: EXIT CARDS

SIDE 1: Of all the things we discussed today, what to you is the most important?

Responses by Topic

FUNDING AND TAX INCENTIVES

1. Subsidy mechanism for presenters to receive support for hiring Saskatchewan resident musicians
2. Ensuring we don't lose funding
3. Investment opportunities
4. Tax and investment opportunities
5. Funding for artists
6. Ongoing sustainable financial support/investment
7. To impress upon the government the notion that it is to Saskatchewan's advantage as a whole to have a thriving music community. Create financial and practical incentives for performers to work and create here
8. Increase grants and loans for the entire music industry
9. Directing government funds/subsidies to Saskatchewan musicians, especially at the grassroots level of creating opportunities for emerging musicians in eating/drinking establishments
10. Sustainable funding
11. Funding for individuals, corporate business, communities
12. Funding help for artists
13. Promotion of sustainable careers that are long-term - through funding at sliding scale for multi-industry
14. The strategy to help grow and sustain re: music industry in Saskatchewan must take into account the needs of established artists. It's hard to maintain and grow a career without the finances to support yourself
15. Administrative support for artists
16. Funding for the Year of the Creative Artist
17. Funding is important
18. Funding is important
19. Grants
20. If festivals are applying for money, they should be encouraged to hire more Saskatchewan talent
21. Eliminate the PST on cultural industry
22. Tax incentives to encourage venues to hire music
23. Tax incentives to radio if they play a certain percentage of Saskatchewan content
24. Tax exemption for musicians. Money provides to help hire a secretary
25. Make it profitable to choose music as a career in Saskatchewan tax incentives, Employment Insurance, pension plan

PROMOTION

1. Education to ourselves (people of Saskatchewan) about what's available (Saskatchewan musicians) to instill pride

2. Saskatchewan Festival at major events, exhibition like WCMA Awards, Juno Awards, etc.
3. Realizing the value of music, educating non-industry people about the importance of music
4. Creating a stronger presence on the national scene (i.e. subsidies)
5. Creating methods of marketing Sk artists on a national level, especially TV
6. Recognizing music and arts as a priority for keeping people in Saskatchewan and attracting more people, almost like parks or art galleries
7. Local promotion
8. Development of grassroots appreciation for the arts
9. Proper marketing
10. Promote the development of Saskatchewan Music Industry to becoming a world exporter of music by year 2011
11. Radio air play, getting Saskatchewan artists time on radio so that people will get a chance to get their music heard
12. Marketing and promotion (perception vs. promotion).
13. Assist community radio to stream their signal on their Internet
14. Funding for community radio
15. The need for recognition of the intrinsic value of the arts in Saskatchewan. That through marketing and promotion, Saskatchewan artists can be valued locally, provincially, nationally
16. Provincial passion for the entire industry. Be excited about what this province has to offer and where it is heading. If the government shows a positive attitude for the industry, and assists in some capacity, it will rub off and excite those in the province
17. Promoting how talented Saskatchewan Artists are
18. Audience development and retention
19. Recognition and promotion
20. Promotion and the info on the music industry and the updates
21. Information
22. Seeing program ideas come forward that could create something towards building culture in our community

EDUCATION

1. School of the arts, year round, multi-disciplinary
2. Education
3. Education relating to this creative industry is sorely missing in this province at the institutional level - high school and post-secondary level
4. The area of mentorship - developing the younger artist
5. Keeping music and arts in schools
6. Long-term education
7. Childhood music education
8. Education
9. Education
10. Cultivating the arts within the province through education and making being an artist more convenient, which will blossom and be good for all in and tied to Saskatchewan

11. Music education
12. School of the arts, year round, multi-disciplinary
13. Education and mentorship
14. Education is important
15. Education is important
16. Education
17. The value of arts education. How it can generate interest in all levels of the arts
18. Saskatchewan as a music destination with renowned expertise in all facets of the industry (like Nashville, Motown etc) that could include an education aspect as a school or program that is music specific

PROFESSIONAL INFRASTRUCTURE

1. Support for artist manager training/education
2. Developed management available to a wide area of the industry including young start-up groups
3. Training programs
4. Marketing and professional development
5. Development of production and marketing programs
6. Train and retain young people in the music industry
7. Creating a stronger infrastructure here in Saskatchewan to help show the world our world-class Saskatchewan talent
8. Develop the infrastructure to enable Saskatchewan artists to be exposed to the idea of music as a career, developing their talents, and having the tools to emerge nationally and internationally
9. Developing the strategies and supports for our Saskatchewan talent to take the next steps to build their careers (market access, education, etc.)
10. Start up funding for music industry professionals
11. Create an office to support artists with management start-up advice and mentorship/career development
12. If you build the infrastructure, they will stay and they will come. Professional development/training and mentorship for youth – in particular, those who could play a significant role in developing the business side of the industry (artist managers, concert promoters, etc.)
13. Saskatchewan needs more management and industry experts to help young talent
14. Seeing the big picture of the industry – confirming there are two levels in the industry – big business and artists
15. Corporate investment and support to industry to develop this industry infrastructure
16. Start-up loans and grants for companies who want to build infrastructure (i.e. management companies and indie labels)
17. Funding for mentorship in the recording industry

PROVINCIAL ORGANIZATIONS

1. Consolidation of existing support and subsequent significant increase in that support
2. Also one umbrella organization
3. One voice (government)

4. Artist/community interaction – supporting organizations like that promote the industry and provide services
5. Long-term: government policy change to restructure funding for art and entertainment (music) into one central department
6. Saskatchewan Film and Sound Organization:
 - a. responsible for education (schools and artists) and umbrella promotion organization
 - b. incentives for gigs – bars, soft seaters, schools
 - c. education resource centre – out of province promotion and within province promotion (small town gigs, etc.)
7. The need for an umbrella organization, a co-op that would service artists to help them develop marketing strategies and promotion skills
8. Increased funding and mandate for SRIA so Saskatchewan Artists can go out and collect tax dollars. Promotion of the Saskatchewan music in and outside of Saskatchewan
9. Funding organizations, mainly non-profits, who are really doing something to elevate and promote Saskatchewan talent. Burnout
10. Letting Saskatchewan artists know what grants help etc is available to them. The more information they can obtain the better

2007

1. Put together a cohesive campaign to generate a province-wide buzz for the three industry award shows. Advertising, promotions, opportunities for performance, highlight the participating Saskatchewan artists. Bring the people that are around the table to have input
2. Sustaining positive hype that will be created in 2007 with the Juno Awards and CCMA Awards
3. Take ownership of our successes...the reason why the Juno Awards are coming to Saskatoon. Sustain the legacy of the Juno Awards
4. Short-term: government support to music industry labels, artists, venues etc in preparation to take advantage of four major music events in 2007
5. Creating momentum from the four events in 2007
6. Don't squash long events with the 2007 events
7. Making sure large events don't squash existing music industry. The Rolling Stones and last WCMA Awards both devastated a month worth of small concerts in every venue in Regina

LONG-TERM STRATEGY

1. A long-term cultural strategy followed up with appropriate resources
2. Long-term stability with an investment component
3. A well articulated vision with a short- and long-term plan that is very adequately resourced
4. Long-term strategy for music industry in Saskatchewan
5. Strategy (long-term) valuing all the arts

LIVE ENTERTAINMENT

1. Ensuring live entertainment continues to exist
2. Live performance industry must continue to grow
3. Live venues
4. Opportunities and venues
5. Children - young excitement for live music

CONSULTATION

1. Spend more time with industry professionals: Ross Nykfonk, Jim Hodges, Bart McKay, Rob Bryanton. CON OR OTHER
2. Open discussion between peers to better the cultural experience of Saskatchewan as a benefit to our community...as well as a cultural export. CON OR PROCESS
3. You listened. There's hope
4. The most valuable aspect of the session was the opportunity for the dialogue itself, which was FANTASTIC, and needs to continue

COLLABORATION

1. Establishing a better based community to grow better contacts within the industry so as to have a broader base of knowledge and experience
2. More communication across the province
3. There is a serious, maybe urgent, need for co-operation between all the institutional players in the music industry
4. Funding supports for non-profits and co-operation and working together

CORPORATE FUNDING

1. Creating a living in the industry without having to hold down one or two jobs
2. Corporate funding (i.e. radio profits funding portion of the arts)
3. Radio and TV funding of music - the biggest users should pay to develop new artists and help fund new recordings
4. The need for legislation that requires media outlets in the province to re-direct some of their profits toward the arts in the province

TECHNOLOGY

1. Internet distribution of Saskatchewan artists
2. How can Saskatchewan musicians access worldwide markets using the participatory "Web 2.0" model?

OTHER

1. Revisit the CIDS recommendations
2. Real programs to help musicians, not the Juno Awards, Rolling Stones or WCMA Awards
3. Industry development and recognition
4. Ways to stimulate growth and development in the industry: forgivable loans, creative arts programs in schools, tax measures
5. Outdated Canadian Content rules - classic Canadian rock should not be considered Canadian content
6. I liked the idea about where the industry will be in 2011

7. Finding artists projects in their time of need
8. Priorities of “business” defines what to do
9. Nurturing and supportive atmosphere
10. Keeping the people being creative is important

SIDE 2: Question #2: In addition to what was discussed today, what, if any, topics do you think should be explored in the second phase of this examination of the music industry? Who would be a good resource on this topic?

Responses by Topic

EDUCATION AND SCHOOL SYSTEM

1. Educational gap
2. Implementing the industry in schools
3. Find a way to get music creation and production into the school system. Maybe we need to create the Saskatchewan School of Rock
4. Getting people interested in the music industry as a career, not only as a performer, but as a manager, promoter, etc.
5. Education of our young people is key – important to get started asap
6. Get a sense from the youth as to what kind of mentorship they would benefit from
7. Adding more opportunities for children to learn about and experience the arts in school. If by having to do drama, for example, and everyone being exposed, this may even have children no so exploited to bullying if they wish to act, sing, etc.
8. Music education in the schools. Guidance counselors should be able to direct students into full-time employment in this industry
9. Education in schools on doing music for a living
10. Elementary and high school music curricula
11. The creation of a multi-disciplinary arts school
12. Performing Arts School
13. Youth grants, education, they are the future

PROMOTIONS AND SUPPORT

1. Support for exporting of Saskatchewan music to worldwide market – creating a strong front; showcasing and supporting artists and industry professionals at events like SXSW, MIDEM, Popkomm, etc.
2. How can government make the arts a high profile and viable industry
3. Public respect of artists and the music industry
4. Supporting the local musicians
5. Reaching out to community (non-musicians/audience)
6. Widely accessible artist support
7. Promotion of local talent
8. Role of local media
9. The development of an ongoing media music showcase for Saskatchewan talent which reaches both inside and outside the province
10. Airing of Saskatchewan music videos on SCN and SaskTel Max

11. Content of emerging Canadian artists on the radio
12. The lack of support for Saskatchewan artists from the mainstream media

DEVELOPMENT OF INFRASTRUCTURE

1. A long-term plan for training the next generation of management artistry and support people, technicians, etc.
2. How to build a better management and promotional infrastructure
3. Promoters; talent buyers; management
4. Expanding existing infrastructure within the industry, i.e. management, recording facilities, employment
5. Talent scouting
6. Music distribution
7. In depth recruitment of creative talent to become residents of Saskatchewan. Kevin and Cory Churko
8. Labels of Saskatchewan
9. Business model
10. Look at the infrastructure of the industry beyond the artists (managers, agents, etc.)

LIVE ENTERTAINMENT OPPORTUNITIES

1. Venues
2. Venues for artists
3. I'd like to hear the point of view of local business i.e. clubs and other with respect to live music and the view of radio
4. More live music venues throughout the province that focus on Saskatchewan acts (OSAC). Why are local arts groups not hiring Saskatchewan acts? There's money?
5. Getting Saskatchewan artists out to the smaller venues - keeping the music in front of the people
6. Do we really need more venues?

FUNDING AND INCENTIVES

1. How to co-ordinate funding and future opportunities with the major players in the commercial music industry in Canada
2. Direct investment in artists or music based facilities by corporations for tax credits
3. Video grants to make videos
4. The music industry does need to be subsidized
5. Business development incentives. I would love to start a business but have to pay the bills
6. In order to grow the musical economy, we must take the measures to make it profitable to choose music as a career. Once that is done, the rest will take care of itself. When people have financial security, it becomes a lot easier to be creative

PROVINCIAL ORGANIZATIONS

1. Low-hanging fruit - identifying specific projects or organizations that could best be utilized to create new opportunities almost immediately - like the proposed Artist Business Centre and [SaskMusic's] existing programs
2. Consolidation of all concerned parties into one voice

3. The agencies with defined roles need to come together with government to review and plan from what is heard in these sessions
4. Increased support for granting agencies such as Saskatchewan Arts Board
5. I feel people need to be made aware of what funding locally and nationally there is available through government programs

LONG-TERM STRATEGIES/ONGOING ASPECT TO STRATEGY

1. Long-term strategies
2. Think long-term
3. What are sustainable programs that add value to our community, or culture?
4. Strategies to fulfill the short and long-term goals

OTHER

1. How this initiative relates to other institutional structures and initiatives: status of the artist, funding to the Saskatchewan Arts Board, lottery funding and cultural policy
2. Bringing existing bands, artists together to review the future of music in Saskatchewan
3. How to put into practice all of the great ideas
4. Detailing how to implement ideas
5. Teach them to fish, don't give them fish

CONTACT NAMES

The following names were offered as future resource people:

- Marian Donnelly
- Efran Periera - Saskatoon musician and producer (older brother to Earl in Wide Mouth Mason). In a band called More Bad Ass
- Kevin Joseph - youth. 987-0978 kevjoseph@hotmail.ca
- Kevin and Cory Churko - producers
- Rod Lanzen - guitarist with Dierks Bentley
- Randal Currie - steel guitar with Brad Paisley
- Phil Anderson - producer, Edmonton Power Sound Studios
- I.G.O.P - Saskatoon promotion company: myspace.com/theinternationalgroupofpals
- Rah Rah - Regina band: myspace.com/rahrabband
- Pearson - Saskatoon band: contact Will Robbins myspace.com/pearson
- John Quinn - President of Saskatchewan County Music Association
- Sam Bardman - of the Manitoba Recording Industry Association
- Kevin Walters - Manitoba Film and Sound but not till after Grey Cup as he is real busy. Call these two and ask them what Manitoba has done right

APPENDIX 1. C

At several points during the discussions, participants highlighted existing models related to industry development. These are listed below for further research consideration.

- Manitoba Music Export Strategy
- Manitoba Film and Sound model of integrating the industries
- Making the case for economic value of the industry: Economic impact studies in Manitoba and Yukon
- Ireland Model for art income tax breaks
- CKUA Model for community radio
- Manitoba Liquor Laws for social liquor permits
- Town of Forget model for rural venues
- OSAC model for organizing tours
- Film industry tax model

Appendix 2

Appendix 2: Interim Report

Saskatchewan
Music Industry Review
Interim Report
November 2006

A Report by Joanne Crofford, Legislative Secretary to the Premier

Saskatchewan
Music Industry Review
Interim Report
November 2006



I am pleased to provide Premier Lorne Calvert and Culture, Youth and Recreation Minister Glenn Hagel with the Interim Report on the Saskatchewan Music Industry Examination. This report outlines short-term recommendations for 2007 and sets forth plans for Phase II of the review, to be completed by June 2007. A summary of findings from in-depth consultations with a representative panel of Saskatchewan musicians and music industry professionals also are presented.

Thank you to Premier Lorne Calvert and Minister Glenn Hagel. This review provides momentum to engage the Saskatchewan community in the excitement of four major music events in 2007.

I also thank the many people who provided advice and guidance to the Phase I report, including those who attended the consultations and participated in passionate discussions about the music industry in Saskatchewan. Your knowledge and willingness to contribute are appreciated and have been invaluable to the outcomes of this review. We have made these insights available to the community so this industry can continue to grow and flourish under its own momentum together with the support of government.

And finally, thank you to Premier Calvert for the honour and privilege to do this work on behalf of our community. I look forward to the work we will do together in Phase II as we envision the future and chart a course for a thriving music industry in Saskatchewan.

A handwritten signature in black ink that reads "Joanne Crofford". The script is fluid and cursive.

Joanne Crofford
Legislative Secretary
Music Industry Review

Saskatchewan
Music Industry Review
Interim Report
November 2006

“My government believes in the strength of creative economies and the enhancements to our quality of life that are brought by innovation and the arts.”³

INTRODUCTION

From the stirring compositions of Joel Fafard, to the frank and honest lyrics of Eekwol, the music of our province is an important vehicle for sharing and communicating who we are as Saskatchewan people.

In May 2006, when Premier Lorne Calvert appointed Regina Rosemont MLA, Joanne Crofford to undertake an examination of the music industry in Saskatchewan, he acknowledged that not only do musicians, singers, songwriters and industry professionals make significant contributions to the province’s economy; they also play a valuable role in shaping Saskatchewan’s culture.

In 2007, Saskatchewan’s music industry will be showcased to the world. The Juno Awards will be hosted in Saskatoon in April, the Canadian Country Music Awards in Regina in September, and the Western Canadian Music Awards in Moose Jaw in October. Prince Albert will create a special Aboriginal music event for this year.

These musical events will provide important opportunities to showcase Saskatchewan talent and build industry momentum. They will also serve to build enthusiasm for the industry among Saskatchewan residents and further build Saskatchewan music audiences.

In 1998, the film industry in Saskatchewan signaled to the Government of Saskatchewan that it was ready to “take it to the next level” and grow a Saskatchewan film industry that would attract investment and increase Saskatchewan’s profile on the world stage. Strategic investment by the Provincial Government in the film tax credit, infrastructure, training, and promotion is directly related to growth in the film industry⁴.

Today, films made in Saskatchewan are distributed around the world. With the support of the Government of Saskatchewan, film production in Saskatchewan has increased from just

³ Government of Saskatchewan. (October 26, 2006). Speech from the Throne 2006.

⁴ Saskatchewan Culture, Youth and Recreation. (January 2005). *15 Years Making Pictures: A Review of the Provincial Government’s Role in the Saskatchewan Film and Video Industry 1989-2004*.

over \$5 million in 1990 to \$65 million in 2005. This has enabled people, and especially young people, to stay in Saskatchewan to pursue a career in the film industry.

In 2005, representatives from four Saskatchewan communities came together to attract four major music events to the province in the same year, thereby creating an opportunity to take Saskatchewan's music industry to the next level. Together with the ongoing work of the Cultural Industries Development Council and SaskMusic, and with the development of the Western Canada Music Awards, Saskatchewan's profile has increased on the Canadian and the international music scene.

Throughout the province, there are many examples of rural and urban community renewal where the cultural industries have played a central role, both commercially and culturally. As stated in the Action Committee on the Rural Economy (ACRE) report, "ACRE now enters a new phase of work which focuses on defining and enhancing community, and on developing small business and entrepreneurship." A little collaboration and a little capital go a long way to make these things happen.

Premier Calvert has recognized that this is the right time to work with the music industry to capitalize on the many opportunities available in this province. This province has the talent.

This Music Industry Review Interim Report offers short-term recommendations and provides direction to Phase II of the review, which will be completed no later than June 2007. The recommendations are based on in-depth consultations with members of Saskatchewan's music industry⁵ and are informed by a review of relevant industry literature, studies and reports, including those on the Saskatchewan Music Industry⁶.

Phase I of the Music Industry Review has clearly shown that, while Saskatchewan has the musical talent, the music industry infrastructure and support systems need to be improved. To achieve this, the short-term strategies articulated in this Interim Report also provide direction for a long-term vision and renewed model for the industry that is sustained beyond 2007.

CONSULTATIONS:

As part of Phase I of this initiative, reference groups comprised of Saskatchewan-based music industry leaders – musicians, songwriters, publishers, managers/agents, producers, labels, studios, publicists, venues, broadcasters, media, provincial organizations and other stakeholders – were invited to participate in discussions on the music industry. The 98 representatives participated in 11 small group and individual interviews conducted in four cities in October and November 2006.

⁵ See Appendix A and B

⁶ See Appendix C

Five topics were discussed:

1. State of the music industry in Saskatchewan;
2. Capitalizing on the 2007 musical events in the province;
3. Impact of technology on the industry;
4. Fostering growth in the industry through taxation incentives; and
5. Envisioning a vibrant music industry in the future.

CONCLUSIONS:

1. Abundance of Talent – Lack of Professional Support

“The content creation is working well. There’s no shortage of talent and people writing great songs. That works well; it stops about there....there’s no infrastructure. I mean, how many times have we seen ...great players, who get a recording, and because... they don’t have the infrastructure to do anything with it, they end up with a thousand discs sitting in their garage or they move to Toronto?”⁷

Saskatchewan is home to many talented, creative musicians. What is lacking is sufficient industry infrastructure to support them, including investment tools, managers, agents, labels, publicists and distributors. The business framework required for an industry to flourish is missing.

While training opportunities to fill this void are also missing, mentoring can and should play an important role.

2. Touring and Live Performance – Lack of Venues and Opportunities

“I don’t know if you remember, like, the ‘70s the ‘80s ... we were all playing in rural Saskatchewan, there was all kinds of town hall dances and stuff going on, and now there is just nothing.”

“10 years ago, you could make \$40,000 to \$50,000 a year playing six days a week. Now even if you play six nights a week, you can’t make a living. It is this constant playing that develops the professional artist/performer.”

Touring and performing live are important and effective means for artists to hone their talents. These appearances also build an “appetite” for live music throughout the province, and help to build a culture that appreciates the music industry in general.

Many discussion groups noted the lack of venues and opportunities to tour. Although festivals were cited as important showcasing opportunities, it was felt that more could be done. Provincial touring poses an economic challenge for both artists and communities, and financial support is important to ensure it thrives.

⁷ All quotations are from participants in the Phase I consultations.

3. SaskMusic and Other Provincial Organizations

“I just think it’s great to have somebody to refer new artists to. When people call our office, I don’t have time to spend the whole day developing them or answering their questions, so I always refer them to [SaskMusic] and tell them to buy a membership right away, get their newsletters, plug in to their events or conferences, their training, and it’s great. I have accessed their funding, and I just think they do a great job.”

SaskMusic and other provincial organizations play an important role in the development of the industry in Saskatchewan through workshops, grants, information, networking opportunities and individual support.

Concerns were expressed about the lack of awareness among emerging artists of the support and financial opportunities available to them. There was general agreement in Prince Albert that the focus of these organizations needs to expand beyond the larger centres of Saskatoon and Regina. In addition, the resources available to artists to get to the “next level” need to be enhanced.

4. Collaboration

“When the community works together, there’s a synergy that’s unstoppable.”

Collaborative efforts involving groups and organizations making up the music community in Saskatchewan are seen to contribute strongly to the success of the industry to date. By working together, the industry develops a sense of community and cohesiveness which makes its voice stronger and more effective. However, there is concern that many organizations are working separately and not combining their knowledge and efforts.

ADDITIONAL TOPICS RAISED DURING CONSULTATIONS:

During the consultations, several proposals were mentioned or submitted to the Legislative Secretary:

- a Saskatchewan School of the Arts;
- university extension, continuing education and regional college programs;
- arts industry certification programs;
- downtown arts renewal projects;
- school-based music education programs and provincial youth music associations;
- a legacy project; and
- other matters relating to music development and the music industry.

These items either will be explored in Phase II or will be directed to the appropriate government agency for consideration.

PHASE I INTERIM REPORT SHORT-TERM RECOMMENDATIONS:

The Legislative Secretary recommends that the Government of Saskatchewan consider three themes for music industry development in the province in the short-term⁸. It is not the role of government to actually implement many of these recommendations; however, if they are to be achieved, government must play a role by providing resources and coordinating effort.

1. Proud Out Loud in 2007 – Create the Buzz

“I don’t think Saskatchewan has a clue that all these events are coming”

“We need saturation ... a publicist for 2007 for Saskatchewan performers ... connecting events to the grassroots”

“We have to make sure the industry get a sense of who Saskatchewan artists are ... the ‘feel’ of the province, the Saskatchewan flavour”

- a. Create a strong media presence through all the major music events of 2007 and the associated events so that every Saskatchewan community is aware and involved. Associated events include public, commercial, industry, and community-based activities.
- b. Foster a collaborative “umbrella” for marketing events, talent, and merchandise, and ensure the local, national and international marketing of the Saskatchewan component is effective and aggressive.
- c. Foster and encourage production of Saskatchewan music industry promotional materials for use by media, and to target and entice national and international VIP’s and industry buyers to Saskatchewan showcases.
- d. Create industry-hosted events to provide increased opportunities to connect Saskatchewan musicians with national and international industry professionals, such as buyer’s rooms, hospitality suites and receptions.
- e. Encourage Saskatchewan alumni to join in the year of music.
- f. Ensure organizations tasked with these responsibilities are appropriately resourced in both personnel and budget.

2. Face the Music – Audience Building and Performance Opportunities

“There are lots of places where people are taking initiative to get things going”

⁸ Various individuals and organizations in the province are already working on some aspects of some of the recommendations, although not at the level of activity urged by the consultations.

- a. Create a concert tour of Saskatchewan talent with enhanced opportunities for local musicians and industry professionals at each event. This may include paid and free events, as well as licenced and non-licenced all-ages events. This will require strategic government investment and private sector and community sponsorship.
- b. Building on the experiences of the Centennial “Crop Checkin” tour, ensure that performance opportunities sponsored by the Government of Saskatchewan build on the strength of communities that have already been working to make music part of their community in urban, rural, and northern Saskatchewan.
- c. Ensure that Saskatchewan artists understand how to apply for music event showcases and other performance opportunities available in 2007.
- d. Ensure young people are involved through a Music Tour of schools throughout the province to engage young people in awareness of the events, in the industry, and to experience musicians in performance and discussion. Utilize existing materials such as SaskMusic’s *Business of Music Teachers Guide*. This could include SCN educational links.
- e. Encourage, where possible, performance opportunities for Saskatchewan musicians at Casinos Regina and Moose Jaw.
- f. Consult with the well-established yearly music events to ensure any new incentives or supports for 2007 do not divert established sponsorship support from existing events.
- g. Expand support to musicians for touring in both internal and external markets.

3. Industry and Musician Readiness for 2007

“One of the things ... that needs to be done ... is develop ...workshop[s] to enable our talent to actually make the most of these showcase opportunities.”

- a. Create a workshop series on performance and export readiness for the many Saskatchewan musicians who will showcase at these events.
- b. Provide appropriate support to Saskatchewan musicians who are showcasing.
- c. Ensure that the organizations empowered to do this work are sufficiently resourced in both personnel and budget.

PHASE II: ENVISIONING THE FUTURE OF THE INDUSTRY:

Phase I consultations provide a rich foundation for designing responses to industry needs beyond 2007. In Phase II of the review, the focus will be on envisioning the future of the music industry in Saskatchewan. The goal is to chart a course for the continued growth of a thriving industry in our province.

Through an online survey and issue-specific reference panels, the review will examine the following issues:

- a business model for industry growth and investment
- maximizing alternate revenue streams
- live music venues and the development of new venue/event opportunities
- impact and best use of technology to support the industry
- education, training and development
- maximizing the benefit of “creative economies” to music
- effective promotion to internal and external markets
- meaningful involvement of youth in the industry

The review will examine cultural industry studies conducted in Saskatchewan over the past 10 years to provide continued support to relevant recommendations. As well, the review will examine studies and reports from jurisdictions across Canada and some selected international jurisdictions that have actively moved forward with supports to music and other cultural industries.

Appendix 3

SASKATCHEWAN MUSIC INDUSTRY REVIEW

Appendix 3: CYR Public Survey Results - Executive Summary

In May 2006, Premier Lorne Calvert appointed Regina Rosemont MLA Joanne Crofford to lead the Music Industry Review (MIR). The purpose of the review was to determine how government could assist the industry in supporting opportunities and nurturing music talent at every level. Phase I of the MIR included a literature review and extensive community consultations with key Saskatchewan musicians, music industry professionals and organizations. In Phase II of the MIR, community consultations continued. As well, two on-line surveys were developed by Saskatchewan Culture, Youth and Recreation (CYR) to collect information from both Saskatchewan residents and Saskatchewan music industry professionals.

This Music Industry Review Public Survey Report was used to provide information to the Legislative Secretary, Joanne Crofford to use in shaping the final MIR recommendations.

The purpose of the public survey was to collect information from Saskatchewan residents regarding the public's level of involvement/engagement in live and recorded music, the benefits and barriers of attending live music performances, information sources they use to find out about new and live music, use of Internet and digital resources, and awareness of Saskatchewan music.

An online questionnaire was developed based on information from the literature review and the consultations in Phase I of the MIR. Two approaches were used to administer this online survey. An email invitation was sent directly to a random sample of Saskatchewan residents. A second approach utilized a link on CYR's website for the public to have access to the survey. Combining both sets of respondents resulted in a total of 1,232 respondents.

The findings highlight the appreciation Saskatchewan residents have for Saskatchewan talent and the impact of the music industry on the Province's economy. There is also evidence that there is a need to support artists in marketing Saskatchewan music.

The top three music genres that respondents listened to were: (1) Rock; (2) Current hits or pop; and (3) Country. Radio (AM/FM) was both the most common method of listening to music and the most frequently used source to find out about new music. Half of the respondents participated in music-related activities in 2006. A large majority of respondents valued the music talent in the province. Also, the majority of respondents agreed or strongly agreed that the music industry is important to the Saskatchewan economy.

Respondents owned an average of 218 pre-recorded music CDs, mini discs, vinyl records, cassettes and/or DVDs. The majority of respondents' inventory consisted of CDs or mini discs. Over half of the respondents converted pre-recorded commercially produced music to digital files. The majority of respondents purchased six or more pre-recorded CDs, Cassettes, Vinyl records or DVDs in 2006. Respondents typically purchased their pre-recorded music at big box stores and traditional music stores.

A large majority of respondents used the Internet for music-related purposes. Over half of the respondents downloaded music in 2006. A large majority of respondents purchased digital music in 2006. Respondents downloaded on average the equivalent of 119 individual songs in 2006. The two most common sources used by respondents to download music were: (1) Digital or online store; and (2) Peer-to-peer file sharing.

A large percentage of respondents attended at least one live music performance (LMP) in 2006. More than ninety per cent of the LMPs attended by respondents were in Saskatchewan (69 per cent in their local community). The three most frequently cited venues where respondents attended LMPs were: (1) Stadium; (2) Concert hall; and (3) Park or other open-air facility. One third of respondents planned to attend at least one of the four major music events being held in Saskatchewan in 2007.

The results indicate that the majority of respondents valued LMPs and felt that the quality of LMPs in Saskatchewan was excellent. The top three benefits of attending LMPs were: (1) It is fun; (2) It makes me feel good; and (3) Spending time with family and friends. The top three barriers that prevented respondents from attending more LMPs were: (1) Cost of tickets is too high; (2) Family and child care obligations; and (3) Not enough time to attend LMPs.

Almost all of the respondents listened to music by Saskatchewan artists. Of those respondents who purchased pre-recorded music in 2006, the majority purchased music by Saskatchewan artists. Of those who downloaded music in 2006, the majority downloaded music by Saskatchewan artists. A large majority of respondents attended LMPs by Saskatchewan artists (of those who attended a LMP in 2006).

To better understand music purchasing behavior of respondents comparisons were made based on six music consumption groups. These groups were created using responses to three variables: (1) Pre-recorded purchases; (2) Live music performance attendance and (3) Digital music purchases.

The results indicated that the high digital consumption groups were younger, more mobile, more likely to be single, and more likely to have a child living in their household. Moreover, high live music consumption groups tended to be more educated and live in communities over 50,000 people.

Respondents in the high music consumption groups had a significantly larger inventory of pre-recorded music. They were also much more likely to purchase their pre-recorded music at locations other than traditional music or big box stores. Overall, the findings suggest respondents in the high music consumption groups were more likely to participate in music-related activities.

The perception that tickets to LMPs are too expensive was a major barrier that prevented respondents from attending LMPs more often. The comparisons also revealed that live music attendance was directly related to the degree to which respondents' received the benefits they were seeking while attending LMPs. Two key benefits that respondents were seeking were to: (1) Support local artists; and (2) Spend time with people who enjoy the

same things I do. This finding demonstrates the importance of live music venues managing their brand identity among their core groups of patrons.

In summary, this report provides information to better understand the needs of Saskatchewan music consumers. In addition to informing the Music Industry Report recommendations, the findings from this study along with the music industry professional survey, will be shared with music industry associations/organizations and other stakeholders to assist them in meeting the needs of Saskatchewan residents. Culture, Youth and Recreation is deeply indebted to the assistance provided by Honourable Joanne Crofford (Legislative Secretary for the Music Industry Review), music industry organizations, and the many Saskatchewan residents who participated in the study.

Appendix 4

SASKATCHEWAN MUSIC INDUSTRY

Appendix 4: CYR Professionals Survey Results – Executive Summary

The purpose of the music industry professional survey was to collect information from Saskatchewan music industry professionals regarding their level of involvement/engagement in live and recorded music, income and expenses from their music-related activities, information sources they used to promote their music and live music performances, use of Internet and digital resources, and what they thought the public's perception was about the music industry.

An online questionnaire was developed based on information from the literature review and the consultations in Phase I of the Music industry Review. Drafts of this instrument were shared with several music industry professional organizations for review.

The intent of this study was to invite as many music industry professionals in Saskatchewan as possible to participate. The online survey was posted on February 27, 2007 and remained open until May 10, 2007. A total of 475 music industry professionals completed the online survey.

The findings highlight the importance respondents placed on the availability of funding resources and development opportunities to support music industry professionals. There is also evidence to support the need to advance opportunities for music industry professionals in Saskatchewan. That said, the majority of respondents were satisfied with their career as a music industry professional and were optimistic of their personal prospects in the music industry.

Almost one third of respondents indicated that the music industry has improved in Saskatchewan in the past two years. Respondents were asked to provide an open-ended comment to explain why they thought the music industry had improved, stayed the same or gotten worse in the past two years. This report provides an analysis of the 329 unique response elements, which were categorized into six emergent themes: (1) Live Music Performance; (2) Industry and Growth; (3) Production; (4) Financial; (5) Education; and (6) Talent.

Most of the respondents reported music-related personal income in 2006 (mean: \$13,671). The three most frequently cited sources of music-related income were: (1) Touring/live show income from performing; (2) Teaching music; and (3) Studio work/hired musician. 23 per cent of respondents indicated that their music income had increased from 2005. The most frequently reported source of financial support received by respondents was money from friends and family.

Respondents spent an average of \$6,807 on music-related expenses in 2006. On average, respondents spent \$2.47 on music-related expenses for every dollar of music-related

income they received. The three most frequently cited expenses were: (1) Equipment; (2) Instruments; and (3) Tickets or admission fees for live music.

A large majority of respondents played an artistic role in the music industry. On average, respondents played five different roles in the music industry. The top three music genres that respondents were involved with were: (1) Rock; (2) Country; and (3) Jazz or Blues. The three most frequently cited music associations that respondents were members of were: (1) SaskMusic; (2) Society of Composers, Authors, and Music Publishers of Canada; and (3) American Federation of Musicians. The majority of respondents conducted their music-related business affairs completely on their own and nearly a third of respondents conducted their business affairs with someone else.

The most common venues where respondents were paid to perform live music were community halls/theatres and music festivals. Further, respondents were most commonly paid to perform live music in their local community. The most commonly identified method of payment by respondents was performance fees. Friends and family was the most frequently cited source used to promote both live music performances and music overall.

On average, each respondent released three album titles prior to 2007. The most frequently cited locations where respondents recorded their music were home studios and rented studios in Saskatchewan. The most commonly cited locations where respondents sold their music were: (1) Concert or live music performance; (2) Artist website; and (3) Traditional retail music stores.

Generally, the results indicate that respondents felt the Internet has had a positive effect on the music industry, primarily as a mechanism to improve communication with other artists and fans. Over half of the respondents had their own music-related website. Nearly half of these respondents used their website to post full length songs and sell music-related merchandise.

Interestingly, the findings suggest that the public's actual view of Saskatchewan's music industry was much higher than music professional's perception of the public's view. This would suggest that the public would support actions to strengthen the music industry in Saskatchewan.

To better understand the perceptions of Saskatchewan music industry professionals, four groups were created using respondents' responses on two income-related variables: (1) Total income received in 2006 (TI); and (2) Proportion of total income received from music-related sources in 2006 (%MR). The four groups were as follows: (1) TI < \$30,000, %MR < 50% (Group 1); (2) TI ≥ \$30,000, %MR < 50% (Group 2); (3) TI < \$30,000; %MR ≥ 50% (Group 3); and (4) TI ≥ \$30,000, %MR ≥ 50% (Group 4).

Group 4 appears to be reflective of respondents who were full-time music industry professionals, able to make a living in the industry. Respondents from this group had an average personal income of \$57,758, of which 93.5% on average was from music-related sources. Similarly, respondents from Group 3 received 91.3% of their total income from music-related sources. However, the average total personal income from respondents in this

group was only \$12,693. Respondents from Groups 3 and 4 also typically spent more time on music-related activities than the other groups. The higher income groups tended to be less reliant on friends and family for financial support, taking advantage of loans and grants more frequently. Moreover, respondents from Group 4 typically took advantage of a wider array of music-related income sources than those in other groups.

Comparisons revealed significant differences in the roles played by respondents and their involvement in music genres. Those from Groups 1 and 2 were more likely to be a songwriter, composer, singer, or member of a band, symphony or other musical group. Respondents from these groups were also more likely to be involved with rock and alternative music than those in the other income groups. Alternatively, respondents from Groups 3 and 4 were more likely to be music educators, teachers or administrators (i.e., lawyer, manager, etc.), and more likely to be involved with classical or opera music. Interestingly, respondents from Groups 3 and 4 were also more likely to perform or record music in a language other than English.

Comparisons also revealed differences in the membership of SaskMusic and the American Federation of Musicians (AFM). Respondents from Groups 3 and 4 were more likely to be a member of AFM, while the younger, part-time professionals were more likely to be members of SaskMusic. This finding highlights the importance of collaboration among music associations/organizations in order to meet the needs of a wider audience of music industry professionals.

In summary, this report provides information to better understand the needs of music industry professionals in Saskatchewan. In addition to informing the Music Industry Report recommendations, the findings from this study along with the public music survey, will be shared with music industry associations/organizations and other stakeholders to assist them in meeting the needs of their existing and potential members. Culture, Youth and Recreation is deeply indebted to the assistance provided by Honourable Joanne Crofford (Legislative Secretary for the Music Industry Review), music industry organizations, and the many music industry professionals who participated in the study.

Appendix 5

Appendix 5: Comprehensive Consultation List

Individuals

Consultations were an integral part of the Review, during Phase I and Phase II. Below is a list of individuals that were consulted over the course of the review.

First Name	Last Name	Organization, Business, or Profession	First Name	Last Name	Organization, Business, or Profession
Deborah	Aitken	Ness Creek Society	Kevin	Korchinski	Organization of Saskatchewan Arts Councils (OSAC)
Ken	Alexe	Saskatchewan Communications Network	Nick	Kourles	Arcadia
Kathy	Allen	Saskatchewan Arts Board	Larry	Krause	Prince Albert Country Music Association
Eric	Anderson	Rawlco Radio	Julie	Kubanowski	Studio
Derek	Bachman	Musician	Skip	Kutz	Saskatchewan Arts Alliance
Brenda	Baker	Singer, Songwriter	Melanie	Laine	Musician
Larry	Bauman	Lasa Media Arts	Michel	Lalonde	Musician, Industry Professional
Carol Gay	Bell	Saskatchewan Express	Eileen	Laverty	Musician
Susanne	Bell	SaskFILM	David	Lawlor	Musician
Dean	Bernier	Musician/Teacher	Maurice	Libby	Musician, WCMA Committee
Janice	Bernier	Musician	Paul	Lomheim	Northern Lights Casino
Larry	Bird	7-Oaks	Gord	MacAuley	Saskatoon Blues Society
Lyle	Bolen	Saskatoon Jazz Festival	Mike	MacNaughton	Twisted Pair Sound Ltd.
Rob	Bryanton	Talking Dog Studios; Saskatchewan Motion Picture Association (SMPIA)	Nancy	Martin	Organization of Saskatchewan Arts Councils (OSAC)
Greg	Burbidge	Saskatchewan Cultural Exchange Society (SCES)	Terry	Massey	Credit Union Centre
Sandy	Burnett	Record Producer	Bart	McKay	Bart McKay Productions
Sandra	Butel	Regina Folk Festival Inc.	Tyson	McShane	City of Saskatoon
Annette	Campagne	Singer, Songwriter	Neil	Meckelborg	Audio Art Recording
Willie	Cole	CKRM Regina	Andrea	Menard	Singer, Songwriter
Keith	Colhoun	CJTR Community Radio, Regina	Danny	Mirasty	Special Events Promoter
Sheldon	Corbett	Musician	Karen	Mondor	Casinos Regina and Moose Jaw
Jason	Cullimore	Freelance Composer	Jeremy	Morgan	Saskatchewan Arts Board
Neil	Currie	Composer	Maurice (Moe)	Nault	Prairie Land Exhibition, Saskatoon City Councillor
Mark	Dejong	Musician	Nadeem	Naz	Musician
Julie	Desjarlais	Industry Professional	Noreen	Neu	SaskMusic
Brian	Dojack	Regina Musicians' Association (AFofM)	Paul	Newton	Saskatoon Musicians' Association (AFofM)
Kevin	Donnelly	MTS Centre, Winnipeg	Tom	Newton	Rawlco Radio
Marian	Donnelly	Artist Manager	Ross	Nykiforuk	Cosmic Pan Studios
Neil	Donnelly	Regina Exhibition Park	Louis	O'Reilly	306 Records; O'Reilly International Entertainment Management
Marny	Duncan-Cary	Singer, Songwriter, Author	Sandhya	Padmanabh	Lasa Media Arts
Cynthia	Dyck	The Refinery Arts & Spirit Centre	Donny	Parenteau	Musician

First Name	Last Name	Organization, Business, or Profession	First Name	Last Name	Organization, Business, or Profession
J.P.	Ellson	WCMA, Sask. Creative Music 2007 Inc., Conexus Art Centre	Garrison	Parker	Turtle Island Music
Peter	England	SaskCulture Inc.	Kelly	Parker	Turtle Island Music
Joel	Fafard	Musician	Suzanne	Paschall	Singer
Irv	Fines	Fine Gold Entertainment	Mitch	Podluck	
Kim	Fontaine	Musician, Industry Professional	Brad	Prosko	B-Rad Audio Recording
Dave	Fries	Zee Studio	John	Quinn	Saskatchewan Country Music Association
Oral	Fuentes	Musician	Brian	Reid	Musician
Barry	Gaber	IPSCO Place	Stéphane	Rémillard	Conseil Culturel Fransaskois
Kim	Gallucci	TCU Place	Mitch	Riabko	Juno Host Committee
Rose	Gilks	SaskCulture Inc.	Jared	Robinson	Nebulus Ent, WCMA Committee
Jim	Ginther	Musician, Teargas Recording Tree Label	Rodrigo	Ruggieri	Ruggieri Lighting & Straging, Ruggieri Fireworks & Special Effects
Marnie	Gladwell	Saskatchewan Arts Alliance	Peter	Sametz	Saskatchewan Arts Board
Victor	Goodman	Art Hauser Centre	Jay	Semko	Musician
Shann	Gowan	Graphic Artist	Jack	Semple	Musician
Ryan	Graham	Field Festival	Lisa	Simmermon	Musician
Sandra	Greenough	Youth Build, Voices of the North	Daryl	Simmonds	Prince Albert Winter Festival
Richard	Gustin	Saskatchewan Communications Network	Brian	Sklar	Musician, Producer
Chad	Guy	Chad Guy Productions	Teresa	Sokyrka	Singer
Mike	Hansen	Musician	Kathy	Stochmal	Musician
Ken	Hawkes	Prairie Arts Festival	Casey	Stone	Singer, Songwriter
Chris	Haynes	Canadian Broadcasting Corporation (CBC)	Roy	Sydiaha	Percussionist
Jim	Hodges	Roadside Attractions	David J.	Taylor	Producer, Engineer, Musician
Gary	Hyland	Co-Chair, WCMA	Ken	Taylor	Craven Country Jamboree
Leanne	Hynd	Singer, Songwriter	Skip	Taylor	Universal Music, Regina
Tony	Kazub	High Voltage Recording	Frank	Theofan	Bach and Beyond
Lorena	Kelly	Musician, Industry Professional	Kevin	Tobin	Saskatoon Jazz Festival
Bob	King	Children's Performer	Al	Vickaryous	Barn Dog Recording Studio
Theo	Kivol	CFCR Community Radio, Saskatoon	Lisa	Walker	Venue Organizer
Harvey	Knight	Aboriginal Music Association of Saskatchewan	James	Wall	Rawlco Radio
Justin	Knight	Musician	Don	Warkentin	Canada Disc & Tape Inc.
Lindsey	Knight	Singer, Songwriter, Mills Label	Abbey	White	Golden West Radio
Ruth	Koop	Briercrest College	Don	Young	Regina Musicians' Association (AFofM)

Events

Along with attendance at the major music festivals being held in Saskatchewan in 2007, two music-related events were also attended during the Review. They were:

- The Music Managers' Forum Workshop in Regina, May 2007
- Cultural Technologies Forum in Montreal, August 2006

Organizations

Below is a list of organizations that were consulted over the course of the review.

Organization	Organization
Aboriginal Music Association of Saskatchewan	Rawlco Radio
Briercrest College	Regina Folk Festival Inc.
Casino Regina	Regina Musicians' Association (AFofM)
Casino Moose Jaw	Regina Symphony Players' Association
CFCR Community Radio, Saskatoon	Saskatchewan Communications Network
CJTR Community Radio, Regina	Saskatchewan Cultural Exchange Society (SCES)
Conseil Culturel Fransaskois	Saskatoon Jazz Festival
Craven Country Jamboree	Saskatoon Musicians' Association (AFofM)
Credit Union Center	SaskCulture Inc.
Field Festival	SaskFILM
IPSCO Place	SaskMusic
Ness Creek Society	Saskatchewan Arts Alliance
Northern Lights Casino	Saskatchewan Arts Board
Organization of Saskatchewan Arts Councils (OSAC)	Saskatchewan Country Music Association
Planet S Magazine	Saskatchewan Express
Prairie Arts Festival	Saskatchewan Motion Picture Association
Prairie Land Exhibition	Talking Dog Studios
Prince Albert Country Music Association	TCU Place
Prince Albert Winter Festival	

Government and Other Resource Contacts

Contact was also made with various government officials within the Saskatchewan Government. As well, consultations were made with officials from Manitoba's Government.

Saskatchewan Government Departments		
First Name	Last Name	Position
Don	Axtell	Crown Investments Corporation of Saskatchewan
Glen	Benedict	Saskatchewan Liquor and Gaming Authority
Cheryl	Kowalchuk	Crown Investments Corporation of Saskatchewan
Ernie	Lipinski	Advanced Education and Employment
Rick	Pawliw	Advanced Education and Employment
Brian	Poole	Saskatchewan Liquor and Gaming Authority
Dawn	Stanger	Crown Investments Corporation of Saskatchewan
Gord	Zakreski	Saskatchewan Industry and Resources

Other Saskatchewan Contacts		
First Name	Last Name	Position
Terry	Massey	Credit Union Centre
Gina	McGinn	SaskCentral

Manitoba Government		
First Name	Last Name	Position
Sam	Baardman	Manitoba Recording Industry Association
Michael	Benson	Manitoba Culture, Heritage and Tourism
Joanne	Dyker	Advanced Education and Training
Alan	Greyeyes	Manitoba Recording Industry Association (MARIA)
Barry	Miller	Advanced Education and Training
Carole	Vivier	Manitoba Film and Sound (MFS)
Craig	Walls	Manitoba Culture, Heritage and Tourism
Kevin	Walters	Manitoba Film and Sound (MFS)

Appendix 6

Appendix 6: Consultation Conference – Question Guide

for Small Group Discussions

May 30, 2007

Opening Round:

Conference participants will be asked to introduce themselves and describe one business relationship that has served them well in their role(s) within the music industry.

Small Group Discussion #1 – Manitoba and Quebec Models

In the presentations this morning you learned about Manitoba's and Quebec's strategies for music industry development. In order to create a business model for Saskatchewan's music industry, it's helpful to consider the experiences of other jurisdictions.

1. What do you think about the models implemented in Manitoba and Quebec?
2. What elements of their approach could be incorporated into Saskatchewan's strategy for industry development?
3. What aspects are not doable in Saskatchewan and why? How could you make them doable?

Small Group Discussion #2 – Investment Strategies

During the Music Industry Review consultations, stakeholders discussed the importance of financial incentives to help build the business of music in Saskatchewan. Ideas included tax credits, forgivable loans, tax exemptions and direct investment. This morning, presenters shared information on successful investment vehicles and loan programs in Manitoba and Quebec.

1. What do you think of the investment strategies implemented in the other provinces? What specific strategy(s) would work well in Saskatchewan and why?
2. Investment strategies can be targeted to assist stakeholders depending on the role they play in the industry and their level of experience. What particular vehicle would move your career/business or the artists/businesses you serve to the next level? How?

Small Group Discussion #3 – Building Relationships

Creating a commercial music industry requires expanding the focus from music as an art form to music as a business. It requires claiming a place for the music industry within the Saskatchewan economy as a whole.

1. What relationships with the larger business community should the music industry build? Which specific organizations need to be approached and by whom?
2. Envision a vibrant commercial music industry well connected with the larger business community and recognized for making a strong contribution to the Saskatchewan economy. How might the industry's relationship with government differ from what it is now?

Final Round:

Conference participants will be asked to reflect on their day together and share with the group one highlight of the conference – something that inspired them, something they learned or some action they feel moved to do.

Appendix 7

Saskatchewan Music Industry Review
Appendix 7: Stakeholder Consultation – Phase II: Stakeholder
Conference Report
Regina, Saskatchewan
May 30, 2007

Stakeholder Feedback

Prepared for:
Joanne Crofford, Legislative Secretary
and
Saskatchewan Culture, Youth and Recreation

Submitted by:
Do Process Facilitation Services
Susan Nurse and Valda Dohlen

Introduction

At the request of Joanne Crofford, Legislative Secretary for the Saskatchewan Music Industry Review, music industry stakeholders were invited to participate in an industry development conference held in Regina on May 30, 2007.

Representatives from all areas of the music industry attended the one day gathering, including provincial organizations and associations, venues, musicians, and industry professionals.

The purpose of the conference was twofold:

- to provide a final opportunity for collective stakeholder input into the Saskatchewan Music Industry Review (SMIR) and more specifically on business strategies that will work for Saskatchewan;
- to provide an opportunity for industry members to consider what relationships and collaboration are needed to carry the industry forward in the long run, beyond the context of the SMIR.

Proceedings

Welcome

The facilitators opened the conference with a review of the day's purpose and agenda.

Opening remarks by Legislative Secretary Crofford were followed by a round of introductions. Facilitators introduced resource people and guest speakers. Participants were then asked to introduce themselves and describe one business relationship that has served them well in their role(s) within the music industry.

Participants noted the importance of many business relationships to the development of their careers. Some acknowledged certain individuals as key to their success. The round provided participants with the opportunity to acknowledge the important relationships that currently exist within the music industry.

Presentations

The remainder of the morning was devoted to the following presentations:

Industry Development: Manitoba Model

- Sam Baardman, Executive Director, Manitoba Audio Recording Industry Association (MARIA);
- Alan Greyeyes, Aboriginal Music Program Coordinator, MARIA; and
- Kevin Walters, Manager, Sound Recording Programs, Manitoba Film and Sound.

Industry Development: Quebec Model

- Stephane Remillard, Directeur-General, Conseil Culturel Fransaskois

Phase II MIR Survey Results

- Dwayne Baker, Senior Policy Analyst, Evaluation Unit, Saskatchewan Culture, Youth and Recreation

Small Group Discussions

The information sessions were followed by a series of three small group discussions. In each discussion, participants had specific questions to consider. Participants were assigned to different small groups for each discussion giving them the opportunity to work with as many different colleagues as possible over the course of the afternoon. One participant in each group accepted the role of recording and reporting highlights of their discussion to the large group. Resource people were available to join a small group to provide information and clarification as requested.

Large Group Debriefing

Following each small group, participants reconvened as a large group to share the highlights of their discussions. The following presents the questions they considered and feedback from each small group discussion.

Small Group Discussion #1 - Manitoba and Quebec Models

What do you think about the models for industry development implemented in Manitoba and Quebec? What elements of their approach could be incorporated into Saskatchewan's strategy for industry development? What aspects are not doable in Saskatchewan and why? Should we try to make them work and if so, how?

Small Group Feedback

While overall the small groups thought the Manitoba model had more application in Saskatchewan than the Quebec model, they noted strengths in both which could be implemented in Saskatchewan.

Strengths of other models:

- Manitoba's successful industry relationships – relationships within the industry, with government and with the larger business community are central to Manitoba's success
- Manitoba's experience of building connections with the business community
- Manitoba's strategy to encourage management companies to be viable businesses with clientele both within and outside of Manitoba - this approach serves local artists in the long run
- Manitoba Film and Sound as a Crown corporation with guaranteed funding
- MARIA's high profile and the resulting increased profile of its members
- Manitoba Film and Sound partnership
- Good inter-departmental communication within Manitoba government
- MARIA's connection with different government departments – taking a cultural industries product and making it relevant to specific departmental mandates
- Manitoba's emphasis on the business side of the music industry
- Manitoba's Aboriginal business development program and its potential application within Saskatchewan's Aboriginal music community
- Manitoba and Quebec's demonstrated commitment to exporting their talent
- The Quebec government's role in defining the importance of culture to the province
- Quebec's venture capital strategy
- Quebec's Heritage model and its application to Aboriginal culture in Saskatchewan
- The level of professional development in Manitoba and Quebec

Concerns with or limits of other models:

- Both models have significantly higher budgets to work with than Saskatchewan
- Quebec's model is hard to compare to Saskatchewan given the differences in the provinces' population sizes
- Music may "lose out" in a Film and Sound partnership

General comments:

- It is important to acknowledge the organizations that are already established in Saskatchewan and the work they do. Saskatchewan has the foundation of a good model, which should be enhanced with increased funding
- Increased funding to the Saskatchewan industry would help make aspects of Manitoba's and Quebec's models possible
- Funding training and development is critical, including mentoring and internships. SaskMusic plays an important role in current training initiatives

Large Group Discussion

During this large group discussion, a participant raised the question of selecting one location in the province to centralize industry development, in particular training. This was followed by a brief discussion in which other participants shared their thoughts. While some felt that it is important to build a "critical mass" of industry people to build from, others noted that different communities have different developmental needs. They stressed the ability of one provincial body to deliver various programs throughout the province.

Small Group Discussion #2 – Investment Strategies

Question #1

What do you think of the investment strategies implemented in the other provinces? What specific strategy(s) would work well in Saskatchewan and why?

Small Group Feedback

Strengths of other models:

- Manitoba's forgivable loan program
- Incentives to build the venues and business side of music industry
- Tax breaks for training, including a strategy to retain newly trained professionals through tax incentives
- Formal training curriculum and a professional designation

Specific strategies for investment:

- Mentorship tied to tax exemptions – bringing in talent from other provinces and having them mentor local people
- Tax incentives to offset operating costs (venues and fuel), hire staff and encourage more programs like 10K20
- Government matching of industry fundraising – for example, matching public dollars raised for community radio or matching Saskatchewan broadcasters' contributions to the Canadian Talent Development Fund

- Tax exemption for personal income tax, whereby artists can earn the first \$25,000 of income tax free
- A venture capital program – a tax credit for financial support from other industries
- Incentives to encourage “engagement” – i.e. encourage venues to book and broadcasters to air
- Ireland’s tax model – create an arts culture that will attract talent to the province

Large Group Discussion

During this large group debrief, there was a short discussion about the Film Tax Credit as a model for the music industry. It was noted that the costs to government from the Film Tax Credit are more than offset by income tax revenue from employment in the province. This was followed by input from Manitoba resource people on similar efforts to establish a sound tax credit in that jurisdiction. They noted that there is not a simple parallel between the film and sound industries. From their experience, the amount of tax revenue the government would forgo through a tax credit for music was relatively small and would not warrant changes to tax legislation. In Manitoba, industry development was better addressed through program funding, such as forgivable loans.

Question #2

Considering your role and experience in the music industry, what particular vehicle would move your career/business or the artists/businesses you serve to the next level? How?

Small Group Feedback

Investment strategies:

- Grants to bring in artists from outside Saskatchewan to work with local producers
- Operating capital – financial support to hire staff and build business networks
- Financial support for export initiatives
- Government matching of fundraising dollars
- Financial support for an apprenticeship program
- Investment to develop industry professionalism – help artists create a self-sustaining fan base, either live or through the Internet
- Increased licensing money to SCN to help create programs that promote Saskatchewan talent and access international markets
- Increased funding for the Saskatchewan Arts Board
- Forgivable loans for established artists

General comments:

- There is no “magic bullet” for an investment strategy. There is not one thing that needs to be established, but rather industry development will require a

multi-faceted approach, including education, market access, mentorship, and tax incentives

- The industry would benefit from increased collaboration with Saskatchewan Learning to ensure training is meeting professional needs. Music professionals should be included in the design of the training initiatives

Small Group Discussion #3 – Building Relationships

Question #1

What relationships with the larger business community should the music industry build? Which specific organizations need to be approached and by whom?

Small Group Feedback

Specific organizations:

- The Entrepreneurial Foundation of Saskatchewan
- Crown Investments Corporation
- Saskatchewan Angel Investor Network
- Saskatchewan Trade and Export Partnership
- Regional Economic Development Authorities
- Chamber of Commerce
- Broadcasters and the Canadian Talent Development Fund
- Major labels
- Large corporations – Wheat Pool and IPSCO
- Tourism associations
- Hotel associations
- Educational institutions
- Banks
- Nightclubs
- Labour organizations

General Comments:

- It is important to establish a single voice for the industry when building relationships. These relationships cannot be achieved by individual artists acting on their own, but rather there needs to be a centralized approach
- Sask Music plays an important role in speaking for the industry as whole
- Attempts to secure venture capital would be more successful if numerous music companies came together in their approach
- There is a need to build the skills, language, and ability of the music industry to make business connections
- Artists would benefit from training on the link between brand development and corporate sponsorship

- CYR can raise the profile of the industry within government and facilitate positive working relations between the industry and other departments, including Saskatchewan Advanced Education and Employment, Saskatchewan Learning, and Saskatchewan Industry and Resources

Question #2

Envision a vibrant commercial music industry well connected with the larger business community and recognized for making a strong contribution to the Saskatchewan economy. How might the industry's relationship with government differ from what it is now?

Small Group Feedback

In the future:

- Government and the music industry are partners with one another
- There is one centralized industry organization which communicates with all members of government
- There is improved and increased communication between industry and government
- The music industry is robust, standing on its own, having made many strides into the larger business community
- The music industry is not simply looking for “handouts,” but is also considering what it can do to support government
- Government is fully recognizing the value of the culture sector – honouring culture as a significant part of Saskatchewan’s heritage
- The industry has a diversified relationship with government and a strong presence at different government “tables”
- Music is strong from an economic perspective and the government supports the creative side of the industry

General comments:

- A CIC representative shared a model used with the construction industry whereby industry representatives meet on a regular basis with representatives from many provincial government departments. This process is intended to increase government understanding of industry issues and industry understanding of government issues. From there, they identify common projects and opportunities for collaboration.

Final Round and Conclusion

To close the conference, participants completed a round in which they were asked to identify a highlight from the day – something that inspired them, something they learned or some action they feel moved to do.

Many participants reflected generally on the benefits of the conference. They felt invigorated and energized to connect with other industry people who were passionate about moving the industry forward. Participants liked the presentations and felt they enhanced their discussions. Many participants appreciated the attendance of the various resource people, in particular many government departments. They thought it was positive for these people to learn about the music industry and its potential. Several participants specifically commended Legislative Secretary Crofford and the government for working with the industry in this capacity. Some participants emphasized that the time is now for better funding for the music industry. In the end, participants were optimistic that some forward direction would result from the Music Industry Review.

Appendix 8

Appendix 8: Glossary

Glossary of Terms		
Term	Definition	Description
AEE	Advanced Education and Employment	a department within the Saskatchewan Government, responsible for post-secondary education and training, career and employment services and immigration services
AFofM	American Federation of Musicians	an international union representing professional musicians throughout Canada and the United States
CALQ	Conseil des arts et des lettres du Québec	a Quebec government-owned agency that provides support to professional artists in each region of Quebec for artistic creation, production, experimentation and training
CARFAC	Canadian Artists Representation/Le front des artistes canadiens	a national, non-profit corporation that represents Canada's professional visual artists
CBO	community-based organization	an organization that is generally non-profit, reliant on volunteers, and responsive to community needs
CCDE	Centre for Continuing & Distant Education	a department within the University of Saskatchewan
CCF	Conseil culturel fransaskois	an organization that supports the cultural development of the francophone community in Saskatchewan
CCMA	Canadian Country Music Association	a federal, non-profit, professional trade organization dedicated to the Canadian country music industry domestically and internationally
CCS	Conseil de la coopération de la Saskatchewan	an organization that assists the Francophone community in the development and expansion of economic opportunities
CHPIF	Commercial Heritage Properties Incentive Fund	a federal government program, administered through Parks Canada, that awards financial incentives to eligible commercial historic places
CIDC	Cultural Industries Development Council	an organization established by the Government of Saskatchewan in 1997 to further the development of the cultural industries
CIDF	Cultural Industries Development Fund	a fund established by the Government of Saskatchewan to assist the development of the cultural industries
CRA	Canada Revenue Agency	a federal agency that administers Canadian tax laws

CRTC	Canadian Radio-television and Telecommunications Commission	a federal independent public authority that regulates the Canadian broadcasting and telecommunications system
CYR	Culture, Youth and Recreation	a department of the Government of Saskatchewan
AFM/EPW	American Federation of Musicians' and Employers' Pension Welfare	a multi-jurisdictional pension plan available to musicians through the American Federation of Musicians
FACTOR	The Foundation Assisting Canadian Talent on Recordings	a non-profit organization which supports the development of the Canadian independent recording industry
FIDEC	Financière des entreprises culturelles du Québec	a partnership between Quebec's cultural and financial sectors designed to provide GAP financing, make equity investments and finance capital-intensive projects within Quebec's culture industries
IFPI	International Federation of Phonographic Industry	a worldwide, membership based organization dedicated to promoting and expanding the value of recorded music
MACSA	Ministerial Advisory Committee on the Status of the Artist	a committee established by the Minister responsible for Culture to provide advice relating to raising the socio-economic status of artists
MARIA	Manitoba Audio Recording Industry Association	a non-profit organization in Manitoba that provides professional development services to music industry entrepreneurs
MBC	Mississippi Broadcasting Corporation	an Aboriginal, non-profit communications society located throughout Saskatchewan
MFS	Manitoba Film and Sound	a statutory corporation of the Manitoba Government that provides financial support to Manitoba's film and sound recording industries
OSAC	Organization of Saskatchewan Arts Councils	a provincial cultural organization that offers visual and performing arts programs and functions as an umbrella agency for Saskatchewan community arts councils and schools
PCO	Provincial Cultural Organizations	cultural organizations that are: non-profit organizations that offer province-wide cultural activities and services, rooted in community involvement and volunteer effort, and on the Minister's eligibility list
RDSSK	Réseau de diffusion de spectacles de la Saskatchewan	a presenters' network for Francophone performers and audiences in Saskatchewan, established by the Conseil culturel fransaskois

SCES	Saskatchewan Cultural Exchange Society	a provincial cultural organization that provides assistance to enhance Saskatchewan's diverse cultural community through cultural programming across the province
SCN	Saskatchewan Communications Network	a public broadcaster which is an agency of the Government of Saskatchewan
SCYAP	Saskatoon Community Youth Arts Project	a non-profit that provides "at-risk" youth opportunities and skills
SFA	Saskatchewan Foundation for the Arts	a legislated foundation that accepts charitable donations which provide support for the arts in Saskatchewan
SGEU	Saskatchewan Government Employees Union	a Union representing the interests of Saskatchewan Government Employees
SHF	Saskatchewan Heritage Foundation	a Crown corporation of the government of Saskatchewan designed to support heritage conservation and development
SMIP	Saskatchewan Music Industry Panel	a proposed structure to encourage strategic communication between the music industry, related industry sectors, and the Government of Saskatchewan
SMPIA	Saskatchewan Motion Picture Industry Association	a non-profit, provincial cultural organization designed as an advocate for Saskatchewan's film industry
SODEC	Société de développement des entreprises culturelles	a Québec government corporation overseen by the Minister of Culture and Communications. It focuses on the financial and entrepreneurial aspects of the cultural industries, offering both direct and indirect assistance to cultural enterprises
SPAGA	Saskatchewan Professional Art Galleries Association	an association that represents participating Saskatchewan art dealers
SPG	Saskatchewan Publishers' Group	a non-profit, provincial cultural organization that promotes Saskatchewan's book publishing industry and acts as an umbrella organization for Saskatchewan publishers
SPP	Saskatchewan Pension Plan	a voluntary pension plan designed for individuals with little or no access to private pensions or other retirement savings arrangements
STEP	Saskatchewan Trade and Export Partnership	a non-profit, membership-based organization that offers significant expertise in marketing Saskatchewan products to international markets

Appendix 9

SASKATCHEWAN MUSIC INDUSTRY REVIEW

Appendix 9: Sources

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