

Pathways to International Markets:

A Strategy to Increase Export Capacity for Indigenous Music



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PREPARED FOR



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Chi miigwetch to our funding partners

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The strategy that follows is aimed at advancing Indigenous artists and music entrepreneurs through exports, aligned to Indigenous music sovereignty.

Executive Summary

1. CONTEXT

Communications MDR was retained by the Indigenous Music Alliance to develop a strategy to increase the export capacity of the Indigenous music¹ sector. This study is focussed on the needs of Indigenous artists who are export ready or who have experience exporting their music in order to further their careers. We recognize that this represents a minority of Indigenous music artists and that many more could benefit from export opportunities. As evident from the review of literature and interviews, the majority of Indigenous artists working in this space are not yet accessing international markets. Research into the needs of the wider population of Indigenous music artists was beyond the scope of the current study.

Greater study is required to look at the needs of artists not yet at this place. Similarly, while the majority of industry representatives who participated in this study are booking Indigenous artists, further study is required to address those organizations not yet booking them. Future research could be contemplated to provide a more comprehensive picture of all Indigenous artists, including those who may be working outside of mainstream industry structures.

The strategy that follows is aimed at advancing Indigenous artists and music entrepreneurs through exports, aligned to Indigenous music sovereignty.² In developing a strategy, the consultants

¹ For the purpose of this strategy, Indigenous music is defined as that created by an Indigenous artist, regardless of theme or topic. See for example, Indigenous Performing Arts Alliance, "Indigenous Musical Sovereignty," Blog Entry, February 22, 2019, retrieved from <https://ipaa.ca/indigenous-musical-sovereignty/>.

² Music sovereignty is understood as an aspect of cultural sovereignty flowing from the inherent right of Indigenous peoples to self-determination. This right is recognized in section 35 of the Canadian Constitution Act (1982) and is articulated in the *United Nations Declaration on the Rights of Indigenous Peoples* (2007), which was officially adopted by the Canadian government in 2016. See also Marcia Nickerson, "Building the Indigenous Music Industry and Developing an Indigenous Music Office, Prepared for the Indigenous Music Alliance, June 30 2021.

drew on multiple lines of evidence, including a review of literature, key informant interviews, a survey of key stakeholders and case studies of successful Indigenous music artists. A more detailed description of the methodology is provided in the Introduction to this report.

International Opportunities for Indigenous Music

A strategy to increase the export capacity of the Indigenous music sector is timely as demand for Indigenous music is growing in Canada and around the world. Indigenous music is flourishing, part of a cultural “renaissance” of Indigenous arts.³ World-

class Indigenous artists are being lauded with prestigious awards, including multiple Juno Awards and the coveted Polaris Prize for music. These popular musicians enjoy significant fan bases, with a large listenership online and in multiple territories. Indigenous music artists are playing to enthusiastic crowds at international festivals and touring the North and South, from Colombia to Norway to the United Kingdom (UK), France, Germany and Australia, and the United States (US) to name just a few. In 2019, the *Indigenous Music Impact Study* led by the Aboriginal

Peoples Television Network (APTN) found that,

“the Indigenous music community is thriving yet the Indigenous music industry (Indigenous- owned, Indigenous-directed music companies and supporting organizations) is in its infancy and there is still considerable room for growth and development.”⁴

³ Alicia Elliott, “The Indigenous renaissance was truly here in 2018 – and its not going anywhere,” in *CBC Arts Year in Review*, December 27, 2018, retrieved from <https://www.cbc.ca/arts/the-indigenous-renaissance-was-truly-here-in-2018-and-it-s-not-going-anywhere-1.4955975>.

⁴ *National Indigenous Music Impact Study*, APTN with NVision Insight Group Inc., 2019.

International markets afford opportunities for growth and development. They can provide multiple potential revenue streams, including performance fees and royalties generated by live festivals and concerts; merchandise sales at live events; and recorded music revenues including royalties generated by radio, TV and streaming platforms; physical and digital sales, and synchronization fees. International markets also provide critical opportunities for creative exchanges, creative development and innovation. As noted in this report, engaging in export activities has had a great impact on the careers of Indigenous music artists.

The strategy that follows will support the building of export capacity building in the Indigenous music sector and support multi-talented Indigenous music artists to realise their full potential in international markets.



2. THE WAY FORWARD - INDIGENOUS MUSIC EXPORT STRATEGY

The Way Forward – Indigenous Music Export Strategy has been developed around four mutually reinforcing strategic directions:



2.1. Finance the Growth of the Domestic Indigenous Music Ecosystem

The first strategic direction is to finance the growth of an Indigenous-owned and -led domestic music industry.

With a few notable exceptions, most funds available to the music industry in Canada lack any strategic focus on assisting the development and export of Indigenous music. There are few dedicated resources (funding programs) specifically aimed at supporting the development and growth of an Indigenous music ecosystem. To counter systemic barriers to funding the Indigenous music ecosystem requires long-term and continuous dedicated streams of funding.

Dedicated Streams of Funding

To strengthen the Indigenous music ecosystem and build export capacity in the sector, it is imperative that financing support be established as a principle and that barriers to success are removed so Indigenous applicants have the ability to compete. The Indigenous music ecosystem requires long-term and continuous investment to thrive.⁵ Funding is needed to support the development of

Indigenous-led and -owned organizations, including artist management companies, labels, publishers, international events and organizations representing the interests of Indigenous music. These are of critical importance to the success of Indigenous artists.

Increasing the export capacity of the Indigenous music sector depends on the existence and strength of a domestic infrastructure that supports all elements of the music ecosystem. Best practice research undertaken for this report revealed that in order to succeed internationally, artists must have access to a robust and solid domestic infrastructure that allows them to invest in creation, access opportunities to perform their music live and to undertake promotion of recorded music. However, the research undertaken in the development of the present strategy shows that the challenges faced by Indigenous music artists and entrepreneurs first identified in the ground breaking 2019 *Indigenous Music Impact Study*⁶ are ongoing.

⁵ Marcia Nickerson, "Building the Indigenous Music Industry and Developing an Indigenous Music Office, Prepared for the Indigenous Music Alliance, June 30 2021.

⁶ *National Indigenous Music Impact Study*, APTN with NVision Insight Group Inc., 2019.

Currently, Indigenous artists and music entrepreneurs have only limited access to the infrastructure of the Canadian music industry, and limited opportunities for development of their talents, skills, and capacity. The 2019 *National Indigenous Music Impact Study* led by APTN found that: “Many Indigenous artists would be interested in working with managers, agents and promoters but do not know where to find them, or how to structure and manage professional relationships of that nature. There is a need for approaches and resources to facilitate broader, useful connections between Indigenous musicians and the music industry.”⁷ We note that for this report, Indigenous artists pointed out the importance of having access to trusted Indigenous players such as labels, managers publishers, agents, to help them advance their careers in ways that are culturally safe.

There is a nationwide need for professional development opportunities to develop Indigenous artists’ and managers’ business skills and deepen understanding of international markets so that they can best leverage these opportunities. A consistent observation amongst interviewees is the urgent need for more opportunities to develop artists and managers’ business skills, and greater understanding of international markets. This includes enhancing access to professional development of business skills, networking and building business relationships, as well as training in planning export activities.

Artists surveyed for the development of this strategy indicated a high priority for funding in the domestic market to support their export ambitions. Funds intended to support the Canadian music sector should reflect the aspirations of Indigenous music

Indigenous artists pointed out the importance of having access to trusted Indigenous players such as labels, managers publishers, agents, to help them advance their careers in ways that are culturally safe.

professionals and companies to grow and thrive at home and abroad and create a more level playing field for Indigenous artists and organizations. Stakeholders consulted for the development of this strategy pointed to two programs as exemplary in their support for Indigenous music exporting activities. These are the Indigenous Music Program created by Manitoba Music, which offers export readiness training to artists and their teams, and the Canada Council for the Arts' Indigenous led Creating, Knowing and Sharing Program,⁸ which provides support for travel and touring, as well as for creation and production, to Indigenous artists and organizations.

National Indigenous organizations with mandates to advance the Indigenous music sector require strategic investments to alleviate their precarity resulting from a systemic lack of operational funding. By comparison, we note that strategic investments have been made in the screen-based sector, where in 2021, the Canadian federal government announced a \$39 million investment over three years for the Indigenous Screen Office.

We note that some national funders, such as Creative Export Canada, the Canada Council for the Arts, the Canada Media Fund and Telefilm Canada, have dedicated programs to foster the growth, development and export

of Indigenous creative sectors and artists. However, it is unclear what proportion of resources allocated to supporting music in Canada are actually used to support Indigenous companies, organizations and creators. An area of further study could be to better understand current demand and available funding to support music exports by Indigenous clients.

It is instructive to note that Australia, which provides broad support for Indigenous art and culture, has created targeted support for Indigenous music. In 2020 the Australian Government launched the Indigenous Contemporary Music Program,⁹ which "supports self-

⁸ Canada Council for the Arts, *Creating Knowing and Sharing: The Arts and Cultures of First Nations, Inuit and Métis Peoples*, program description, retrieved from <https://canadacouncil.ca/funding/grants/creating-knowing-sharing/indigenous-organizations>.

⁹ Australian Government, Department of Infrastructure, Transport, Regional Development, Communications and the Arts, Office for the Arts, *Indigenous Contemporary Music*, Program description, Corporate

determination by funding First Nations-led organizations to provide professional industry-based opportunities for Aboriginal and Torres Strait Islander musicians and bands,” with a funding allocation of AUD \$1.5 million (CAD \$1.3 million) over three years.

With the *Online Streaming Act*’s stated priority for supporting and promoting Indigenous content (stories and music), there is an opportunity for the federal government to take the lead in ensuring dedicated resources for Indigenous music. The new injection of resources anticipated through the implementation of the Act could

substantially support the promotion of Indigenous music to Canadian and foreign audiences and would be complementary to artists’ own efforts to build their online presence and fanbase.

In addition, the Canadian Radio-television and Telecommunications Commission (CRTC)’s follow-up proceeding on the commercial radio policy¹⁰ provides yet another avenue to advocate for increased support for the Indigenous music sector. An appropriate body to administer funds directed to the Indigenous music sector would be an Indigenous-owned or directed organization.



website: <https://www.arts.gov.au/funding-and-support/indigenous-contemporary-music>.

¹⁰ CRTC, *Broadcasting Regulatory Policy CRTC 2022-332*, retrieved from <https://crtc.gc.ca/eng/archive/2022/2022-332.htm>. Through this proceeding, the CRTC has indicated that it “intends to gather information on different funds and initiatives that help support, promote and ensure the sustainability of the Indigenous broadcasting content sector.”



To be export ready, artists must gain local and national experience. Recognition and success in domestic markets also helps artists break through with international audiences.



2.2. Strengthen Export Readiness of Indigenous Artists

The development of a far-reaching, national program is needed to encourage and support the professional development of Indigenous artists and professionals in all positions that support export activities, including support for artists and their managers to develop their business knowledge and skills, export bootcamps to help artists and their managers develop their export market plans. Export readiness workshops targeting Indigenous music professionals are currently being provided by some organizations, notably Manitoba Music. More such initiatives are needed across the country to help Indigenous artists and managers to develop the tools needed to succeed in the international market.

While there are many pathways to the international market, as shown by the artists profiled in this report, the elements that support their international efforts vary from artist to artist. The elements that can support exporting are wide-ranging and include opportunities to attend and/or perform at international markets and events, developing relationships and accessing representation (managers, agents, labels) with an international focus and international exposure online through streaming music platforms, social media and performer websites.

For the Indigenous music community, elements of export readiness are at this time mostly aspirational. They need access to professional development opportunities to attend, gather information, and introduce themselves to a new market, and to initiate or strengthen business relationships with potential managers, agents, labels, festival programmers. Export success is built on relationships, requiring repeat visits to markets. Having opportunities to travel to markets supports the building professional networks and developing community abroad.

Export ready artists are best positioned to leverage international showcasing opportunities and develop touring and other export opportunities. Industry players, including international booking agents, promoters and venues, consider the export readiness of artists when making their programming decisions. To be export ready, artists must gain local and national experience. Recognition and success in domestic markets also helps artists break through with international audiences.

Representation is critical to export readiness for many artists. Accessing international audiences requires an entrepreneurial mindset which can fall within the domain of the artist, their management and supporting team, which may include management, legal and accounting

expertise, label, publisher, publicist, merchandising partners, international booking agent, tour manager, and other international partners such as promoters, venues, showcasing events, etc.

Representation is considered important by potential buyers, particularly artist management. Indigenous artists surveyed for the development of this strategy were more likely to report being successful in undertaking export activities when supported by managers, labels or publishers. It is important to consider that definitions of export readiness have been developed by the mainstream music industry, which may not always be the best indicators of readiness for Indigenous artists, whose careers may be self-directed.

A large majority of artists and their representatives surveyed for this report identified a need for more professional development opportunities. Interviewees spoke of the importance of accessing Indigenous-led programs designed with knowledge and input of Indigenous music professionals. Programs designed by Indigenous music professionals have the greatest potential to reach Indigenous music artists and were generally seen as more relevant to their needs. A consistent observation amongst interviewees is the urgent need for more opportunities to develop artists and managers' business skills, and greater understanding of international markets and how best to leverage opportunities.

There are currently a small number of Indigenous-led programs that provide training, mentorship and funding to Indigenous artists and managers, as well as to professionals working in technical positions in the industry. The Indigenous music sector also has access to a small number of exemplary programs designed and delivered by Indigenous leaders embedded within non-Indigenous organizations. Notable amongst these are the Indigenous Music programs of Manitoba Music, which provides training to Indigenous musicians and managers to support successful exporting. However, opportunities are not consistently available across the country, and may not be tailored to the specific development needs of Indigenous artists. The research for developing this strategy found that Indigenous artists successful in international markets benefitted from having access to mentors, managers, labels and professional networks and in some cases high-profile collaborators. They also successfully leveraged the recognition bestowed by major awards such as the Juno Awards and the Polaris Prize in Canada, and nominations for American Grammy Awards to take their careers to the next level of even greater success.

2.3. Prioritize International Showcasing and Touring

Export strategies that are developed by Indigenous artists and their representatives should include international touring and showcases. The showcase model remains the predominant engine for export activity, as a global circuit of national/industrial hubs for business, touring, media, promotional and related activity.

There are opportunities to expand the export of music as demonstrated by both the plans of artists and their representatives in the coming year and the interest expressed by international markets and festivals in showcasing more Indigenous music, including hosting showcases supported by funding from Canada. Having found success in the US, the UK, Germany and Australia amongst other markets, Indigenous artists are planning to perform at international showcases and festivals. Future opportunities have been identified in the US, Europe, Australia and New Zealand. Norway and Mexico are also seen to present opportunities.

Adapt Travel and Touring Support to Needs of Indigenous Artists

Targeted support is needed to support international touring by export-ready Indigenous music artists. Every effort should be made to provide sufficient funding to remove risk from artists. Funders should consider covering more of the costs incurred by Indigenous music artists for export-related activities, up to 100% of all related showcasing costs including travel.

More than 93% of artists surveyed and 100% of artists' representatives said that the funding support they received from federal and provincial sources was extremely important or very important to the successful export of Indigenous music. However, artists and their representatives are reportedly unable to seize all the international opportunities that exist because of a lack of access, or lack of timely access, to funding. Three quarters of artists and two thirds of artists' representatives surveyed

88%
OF
ARTISTS



100%
OF
ARTISTS'
REPRESENTATIVES

+



indicated
a need for
international
touring grants

3/4
of Artists

+

2/3
of Artists'
REPRESENTATIVES

had to finance
their own
export activities

have had to finance their own export activities. The vast majority of respondents – 100% of Indigenous artists' representatives and 88% of Indigenous music artists, indicated a need for international touring grants. Over 80% of artists also indicated a high priority for funding to organize Indigenous showcases, travel grants within Canada and Canadian touring grants.

This study found that the long turn-around time on travel grant applications in most programs add a burden of risk to artists whose financial context may already be fragile. Travel assistance programs need to be designed by and for, and in collaboration with, Indigenous peoples, to better reflect their needs. Stakeholders pointed to specific needs of Indigenous artists that can act as barriers to touring, such as travelling with small children and other family members, the need for access to health care when abroad, or limited access to credit (i.e., credit cards), that can make financing a tour more challenging.

Nurture International Networking and Relationship-building

With appropriate support, an Indigenous-owned or -directed organization could be tasked with the development of an Export Office aimed at providing market intelligence on key territories to target and penetrate, and relationship building with international networks.

Interviewees noted the importance of business networks for the development and circulation of Indigenous music in international markets. The most successful export strategies remain embedded in personal and industrial networks that require large amounts of time and repeated market reconnaissance to succeed.

Successful music exporters still require support and assistance to realize their export strategies including on the ground support, financing, introductions, access to networks and showcase events. It is important to have a local partner in place when showcasing at an international market event. Developing international networks and attending international market events assist music industry professionals in developing key networks and

are the most important factor in developing a successful export strategy.¹¹ However, access to international networks remains a challenge for Indigenous music artists and entrepreneurs. A mere 6% of Indigenous artists surveyed reported having an established international network in the music industry, while over half (58% of artists' representatives reported) having an established international network in the music industry. Export offices are being used in countries around the world and are considered effective in helping to coordinate export activities.¹²

Target Markets - Strategic Support for Indigenous Organizations

Dedicated resources for Indigenous organizations will provide strategic investment in the development of the sector and increasing its export capacity. Indigenous artists surveyed for this report are already undertaking a variety of export activities in the United States, United Kingdom, France, Germany, Australia and New Zealand. With additional support, an Indigenous-owned or -directed organization could lead or co-lead export missions to target markets with other industry partners.

¹¹ Professor Richard Vella, University of Newcastle, et al., 2019, Op. Cit.

¹² Professor Richard Vella, University of Newcastle, et al., 2019, Op. Cit.

All of the festivals and markets that were consulted for this study have featured or presented Indigenous music artists in the past and are interested in doing so again in future editions of their events. However, selection by international festivals is highly competitive. For its part, Indigenous participation in government led trade missions was said by interviewees to be very low. Only 13% of survey respondents indicated that they planned to participate in one in the coming year.

2.4. Promote Discoverability on Streaming and Broadcasting Platforms

The recent adoption of the Online Streaming Act in Canada presents an unprecedented opportunity to promote Indigenous music to Canadians and the world. It is anticipated that the implementation of the Act will ensure the discoverability of Indigenous music aired by Canadian radio broadcasters and streamed online by dedicated services. Other opportunities are afforded by upcoming regulatory reviews by the CRTC.

For recorded music, disseminating an artist's music through streaming services, social media and other platforms such as YouTube and Instagram have been identified as best practice for successfully undertaking export activities. Our case studies demonstrate the importance of having an international market release strategy to maximize the promotional opportunities afforded by digital streaming services.

The CRTC has noted the issue of representation of Indigenous music content on Canadian radio is being examined in the ongoing consultations on the new *Online Streaming Act*.¹³ The Commission is also co-developing a new Indigenous Broadcasting Policy, in partnership with First Nations, Métis, and Inuit broadcasters, content creators, and audiences.¹⁴ In its revised Commercial Radio Policy, the CRTC has laid out an expectation that commercial radio broadcasters include Indigenous music in their playlists, without setting quotas.¹⁵ Indigenous leaders recently called on the CRTC to impose a minimum commercial radio airplay quota of 5% for Indigenous music content.¹⁶

¹³ Connie Thiessen, "Indigenous leaders call for minimum commercial radio airplay quota," in Broadcast Dialogue, March 28, 2023

¹⁴ CRTC, *Co-Development of the Indigenous Broadcasting Policy*, Corporate website: <https://crtc.gc.ca/eng/comm/ppl/index.htm>.

¹⁵ CRTC, *Broadcasting Regulatory Policy CRTC 2022-332*, retrieved from <https://crtc.gc.ca/eng/archive/2022/2022-332.htm>.

¹⁶ Connie Thiessen, "Indigenous leaders call for minimum commercial radio airplay quota," in Broadcast Dialogue, March 28, 2023

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Introduction

Communications MDR was retained by the Indigenous Music Alliance to develop a strategy to increase the export capacity of the Indigenous music sector. The strategy is aimed at supporting the advancement of Indigenous artists and music entrepreneurs through exports in key international markets. The strategy also provides evidence of the rich and diverse Indigenous music scene from northern Turtle Island ("Canada").

Scope and Limitations

For the purpose of this study, music is defined as Indigenous when it is created by an Indigenous artist, regardless of theme or topic.¹⁷ Based on the availability of information, the study is inclusive of the many music genres and formats (i.e., live or recorded) in which Indigenous artists work. Music exports are defined in this report as referring to activities that generate revenues through the selling of music in various forms outside of national borders.¹⁸

This study is focussed on the needs of Indigenous artists who are export ready or who have experience exporting their music in order to further their careers. We recognize that this represents a minority of Indigenous music

artists and that many more could benefit from export opportunities. As evident from the review of literature and interviews, the majority of Indigenous artists working in this space are not yet accessing international markets. Research into the needs of the wider population of Indigenous music artists was beyond the scope of the current study.

Greater study is required to look at the needs of artists not yet at this place. Similarly, while the majority of industry representatives who participated in this study are booking Indigenous artists, further study is required to address those organizations not yet booking them. Future research could be contemplated to provide a more comprehensive picture of all Indigenous artists, including those who may be working outside of mainstream industry structures.

¹⁷ Indigenous Performing Arts Alliance, "Indigenous Musical Sovereignty," Blog Entry, February 22, 2019, retrieved from <https://ipaa.ca/indigenous-musical-sovereignty/>.

¹⁸ Live-DMA, *A European Music Export Strategy: Final Report*, 2019.

Methodology

The study drew on multiple lines of evidence, including a review of literature, key informant interviews, a survey of key stakeholders and case studies of successful Indigenous music artists. The review of literature identified approaches and insights that could support the development of a strategy to increase Indigenous music export capacity. Annex I contains a selected bibliography.

Twenty-one interviews were conducted with key stakeholders aimed at the development of a strategy to increase export capacity. Those interviewed included representatives of Indigenous music companies, Indigenous and non-Indigenous music associations, Canadian music funders and international music festivals and markets. Annex II contains a list of interviewees.

The study surveyed 42 Indigenous music stakeholders drawn from selected Indigenous music artists with experience exporting or considered export ready; labels, publishers and agents that represent Indigenous artists

and international showcasing festivals that have featured Indigenous artists. A list of potential survey respondents was developed by the consultants in consultation with the Indigenous Music Alliance. Survey respondents were sent an invitation email with a unique link to the survey. In all, 42 respondents participated in the survey. This included 18 artists representing a broad range of musical genres. A total of 18 professionals who represent Indigenous music artists (artist managers, labels, publishers and agents) also participated in the survey about their experience with Indigenous artists they represent. For the most part, respondents who participated in the survey are based in Ontario, Manitoba and Quebec. British Columbia, Alberta, Northwest Territories, Yukon, and Newfoundland and Labrador were also represented. Annex III contains a summary of the findings of the online survey of artists and their representatives. Six international festivals and markets also responded to the survey online. Seven successful Indigenous music artists are profiled in the report, illustrating pathways to international markets.

Structure of this Report

This report is divided into four sections as follows:

Section I

provides a context for understanding music exporting;

Section II

presents an overview of the trends, challenges and opportunities with respect to exporting Indigenous music;

Section IV

concludes with a strategy to increase the export capacity of Indigenous music artists and entrepreneurs.

Section III

profiles Indigenous music artists successful in international markets;

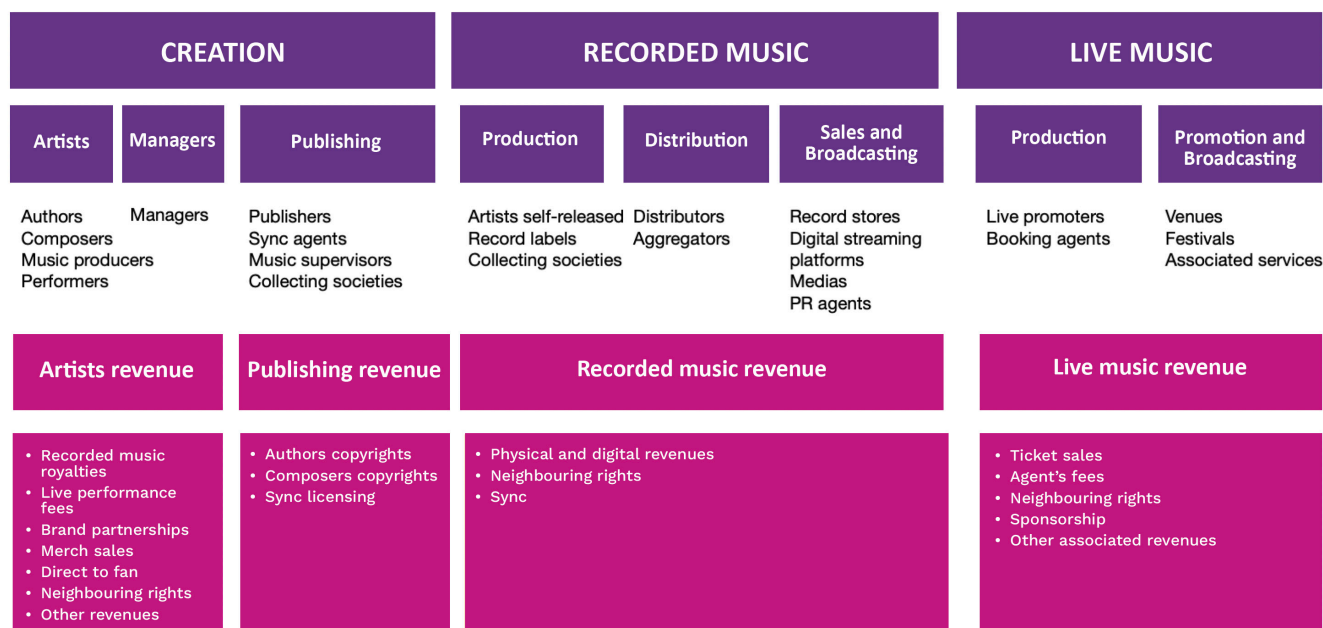


I. Understanding Music Exporting

1. THE MUSIC EXPORT ECOSYSTEM

The music export ecosystem is characterized by many different actors, export activities and revenue streams. (See Figure 1) As has been noted, “in order to foster the growth and development of music export capacity all levels of the ecosystem need to be strategically aligned and working together.”¹⁹

Figure 1: Overview of the Music Market Export Ecosystem²⁰



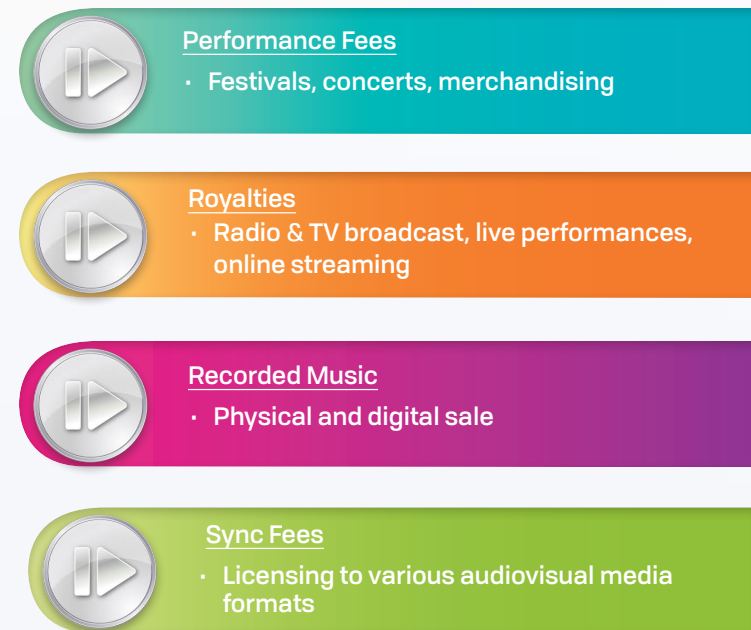
¹⁹ Live-DMA, A European Music Export Strategy: Final Report page 9.

²⁰ Adapted from A European Music Export Strategy, Op. Cit., page 8.

1.1 Sources of Export Revenues

The music industry encompasses a number of potential revenue streams from international markets. These include performance fees for festivals and concerts (+ eventually merchandising); royalties generated by live music performances, broadcasting of music in radio, streaming platforms, television etc; and recorded music revenues, from physical sales and digital revenues; and synchronization fees. As shown in Figure 2, music export revenues may come from concerts performed abroad through festivals and touring, which generate important performance fees as well as generating music publishing royalties. Traditional exports include physical sales of music recordings in brick-and-mortar stores, as well as digital sales online, and streaming revenues from streams played in foreign jurisdictions. For its part, streaming also generates royalties. The licensing of music rights for use in audiovisual formats (called synchronization or “sync” fees), such as for use in film, television or web series, is another source of export revenues.

Figure 2: Sources of Export Revenues²¹



Online distribution provides artists with immediate access to international audiences.²² Streaming music has completely altered how recorded music is consumed, while social media provide listeners with discovery and consumption opportunities.²³ Even in an increasingly

²¹ Live-DMA, *A European Music Export Strategy: Final Report* page 6.

²² Live-DMA, *A European Music Export Strategy: Final Report*, page 8

²³ Daniel Antal, *Central European Music Industry Report*, prepared for Central & Eastern European Music Industry Databases, 2020.

digital environment, international market events continue to be a key platform for doing business and there is a greater dependence upon touring and merchandise to attract revenues from foreign markets. For artists and their teams, networks are more important than ever. Networks create opportunities for partnerships, establishing deals, building on opportunities and increasing knowledge of trends. To succeed, international relationships require repeated investments of time and attendance at markets. Despite the emergence of digitized business models, having a physical presence internationally is still necessary.²⁴

The extent to which artists can generate revenues from international markets depends on the career stage of the artist. These stages are defined by size of audiences, sales and digital footprints available through social media analytics. Breakthrough artists are at a tipping point in their careers, at the stage of development described as “a sudden burst of forward momentum in their career.”²⁵

2. BEST PRACTICES IN EXPORT READINESS

The particulars of export readiness are unique to each music artist. Music export readiness is not prescriptive. While some artists reach global audiences immediately upon uploading their music online, for most artists, success abroad is built on established domestic success. Figure 3 presents a framework of various elements that support exporting.

For the Indigenous music community, elements of export readiness are at this time mostly aspirational. Having opportunities to travel to markets will help emerging Indigenous artists build their professional networks and develop their community abroad. Artists need access to professional development opportunities to attend, gather information, and introduce themselves to a new market, and to initiate or strengthen business relationships with potential managers, agents, labels, festival programmers. Export success is built on relationships, which require repeat visits to markets.

²⁴ Professor Richard Vella, University of Newcastle, et al., *Born Global: Australian Music Exports: ARC Linage Project – The economic and cultural value of Australian music exports*, University of Newcastle, Monash University, APRA AMCOS, Australia Council for the Arts, July 2019, page 12.

²⁵ *Music in Motion: An Analysis of Exporting Canadian Independent Music*, prepared by Nordicity for CIMA, page 11.

Figure 3: Music Export Readiness Framework²⁶

	Representation	The three main actors in this space are the artist's manager, label and publisher. Some artists represent themselves when negotiating deals.
	Strategic planning and infrastructure	Having the appropriate management team and an export strategy are essential. This includes market research, management, an international partner, legal support.
	Networks	Having international networks to build an export team, market knowledge and support or who can provide access to key stakeholders and support.
	International industry events and showcasing	Managing a presence at these events enables networking, keeping abreast of industry changes and opportunities.
	Knowledge of market territories	Each territory will have its own demands which could include visa regulations, ground support or specialist skills.
	Access to Financing	Adequate financing is needed to ensure delivery of product, international follow-up of meetings, follow-up tours and media appearances.
	Promoting and maintaining the story	A narrative or 'buzz' is necessary to be able to gain media exposure, as does maintaining the narrative with backup resources (recordings). This include publicists, tastemakers, influencers and bloggers.
	Digital footprint	The size of the artists' fans, and their demographic and reach are important determinants for career stage (Emerging, Breakthrough, Established, Epic).
	Online and social promotion	Dissemination and promotion through streaming services, social media and sharing platforms such as YouTube and Instagram.
	Domestic activity	Building a strong local or national audience, and participation in professional development workshops and export readiness activities..

²⁶ Steven Chen et al., *The Music Export Business: Born Global*, Routledge, 2021. See also Music Finland, *Export Artists Accelerator, program description*, Music Finland website: <https://musicfinland.fi/fi/export-artist>.

II. Exporting Indigenous Music: Key Trends, Challenges and Opportunities

This section presents the findings of on-line surveys and interviews conducted with Indigenous artists, labels, managers, publishers, international festivals and markets on the exporting of Indigenous music.

1. EXPORT ACTIVITIES UNDERTAKEN BY INDIGENOUS ARTISTS

1.1 Export Activities Are Very Impactful on Success and Include a Range of Activities

Stakeholders surveyed for this report are actively involved in exporting activities and describe these as being very impactful on their successes. Indigenous artists consulted for this study describe their export activities as inclusive of a broad range of initiatives as is shown in Figure 4. Activities include performance at international showcases and festivals, international streaming, international sales and distribution of recorded music, international touring, signing recording and licensing deals, appearing on international radio and television and generally conducting business meetings. Indigenous artists are hiring international publicists and booking agents to help with their export activities. To a lesser extent, Indigenous artists are participating in government led trade missions and signing of publishing deals.

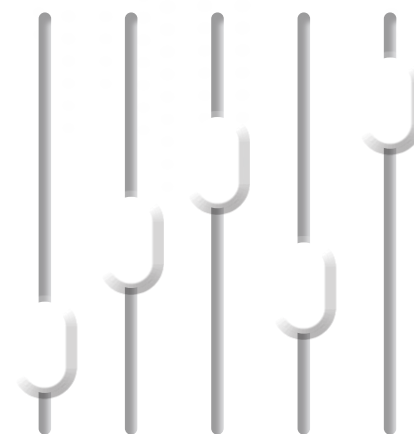
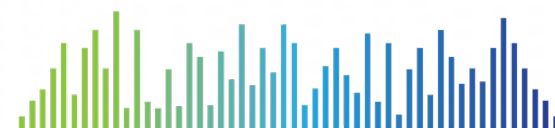


Figure 4: Export Activities by Indigenous Artists (multiple choice selections)

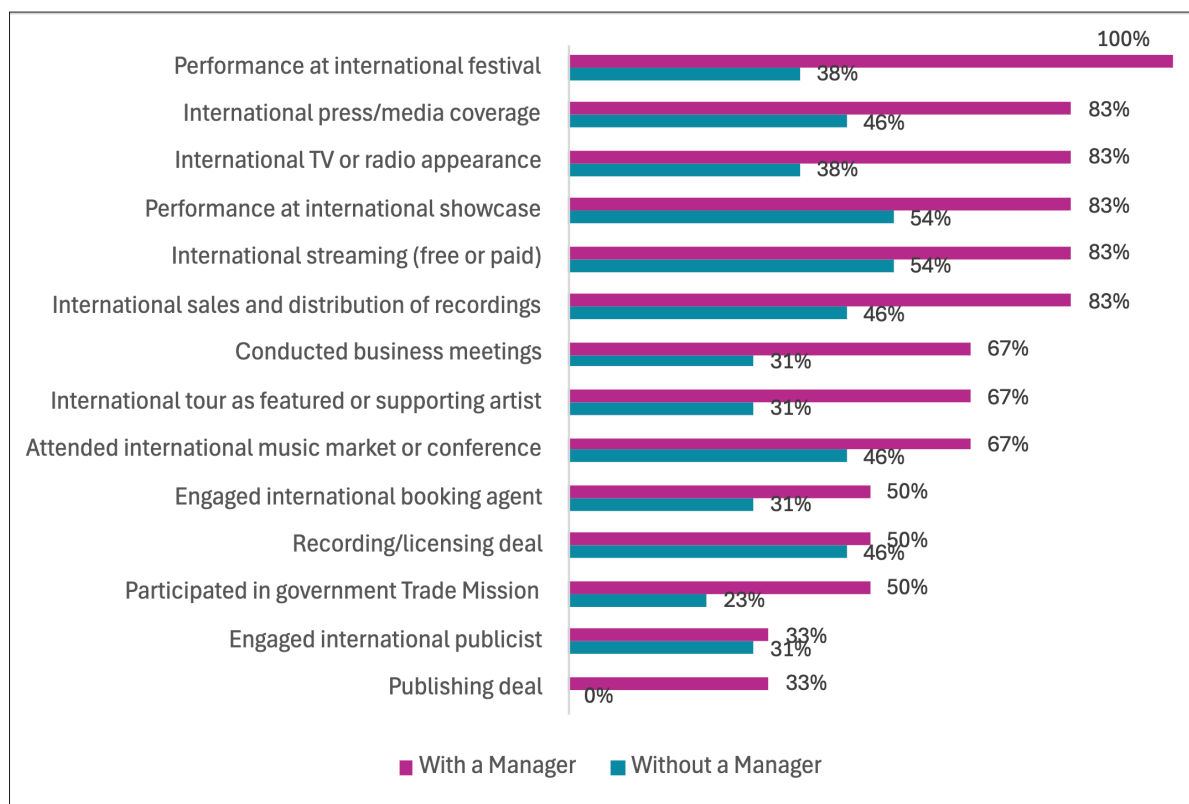


1.2 Access to Representation Has an Impact on Export Activities

In Figure 5, we can observe that more export activities are taking place when an Indigenous artist has retained artist management services.

According to interviewees, access to management is critical to successful exporting. It was said that a dedicated manager can take an artist's career to the next level. Managers can also assist with international markets planning and with the hiring of agents or publicists in foreign markets. This and other studies have noted that many artists represent themselves in the industry. As shown in the 2019 *National Indigenous Music Impact Study*, this lack of representation is a significant challenge for many artists.²⁷

Figure 5: Export Activities by Indigenous Artists With a Manager and Without (multiple choice selections)

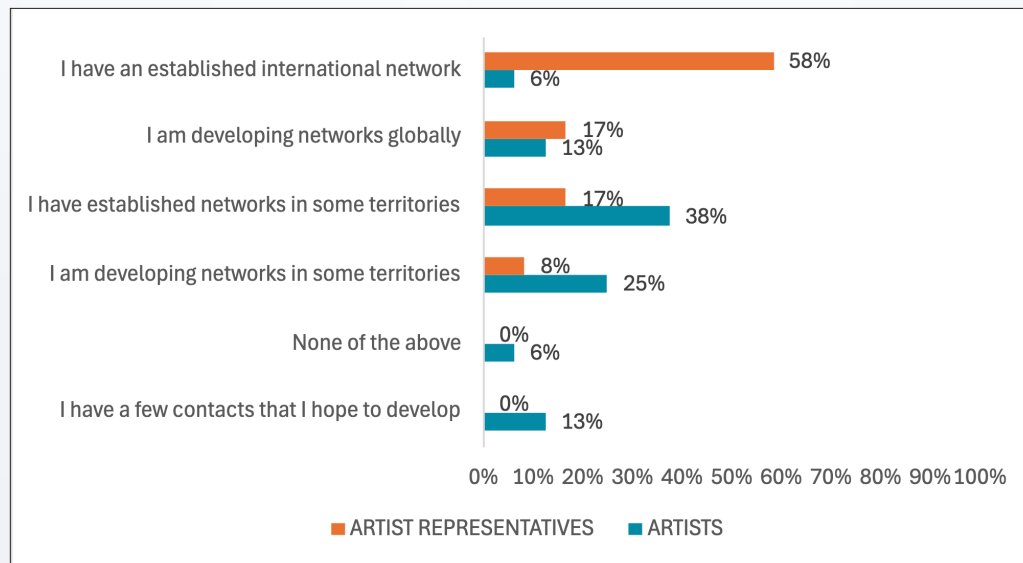


Even in an increasingly digital environment, international market events continue to be a key platform for doing business and there is a greater dependence upon touring and merchandise to attract revenues from foreign markets. For artists and their teams, networks are more important than ever.

1.3 Access to International Networks is a Challenge

Interviewees noted the importance of business networks for the development and circulation of Indigenous music in international markets. However, a mere 6% of Indigenous artists surveyed reported having an established international network in the music industry. Thirty-eight percent of respondents have networks established in some territories while 25% of respondents said they are working to develop their international networks in some territories. For their part, artists' representatives reported more frequently (58%) having an established international network in the music industry. (See Figure 6.)

Figure 6: Access to International Networks

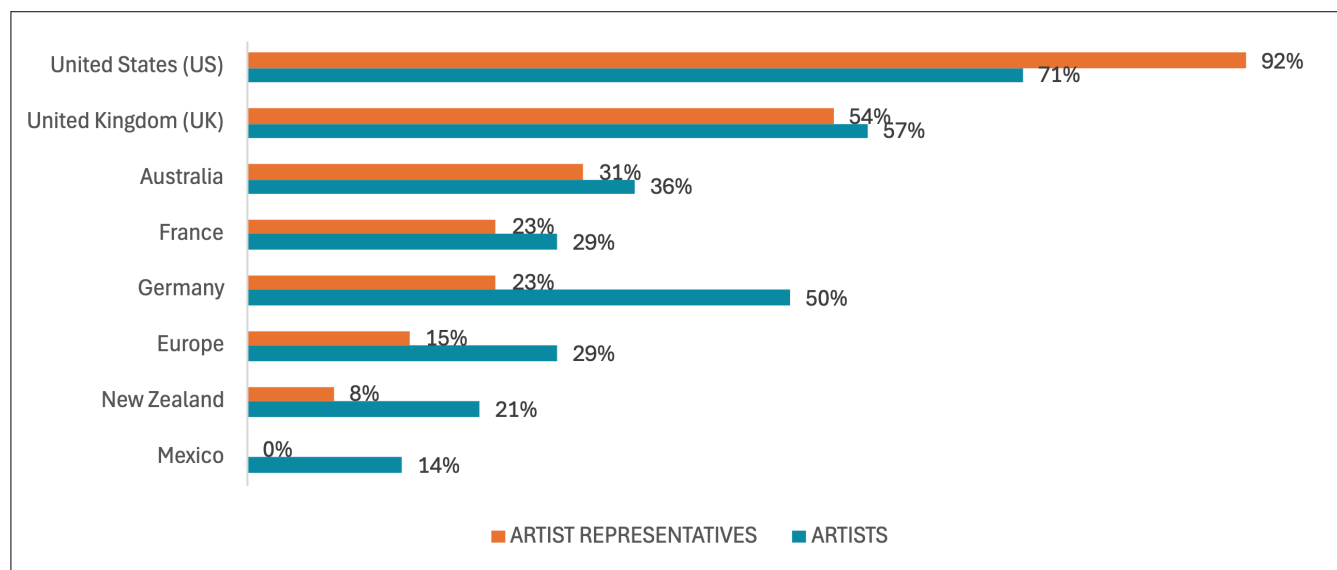


2. KEY TERRITORIES

2.1 The Top Three Territories for Exports Include the US, the UK and Australia

Artists, managers, labels, booking agents and publicists describe the US as the territory in which they had the greatest success in exporting Indigenous music. To a lesser extent, the UK was indicated by over half of all respondents as a territory where they have had success. Half of all artists reported having success in Germany. Other territories where artists had some success included Australia and France, New Zealand and Mexico. (See Figure 7.) Amongst the artists profiled for this report, we note that some territories lend themselves to exporting due to established personal and professional networks. For example, Lido Pimienta has toured Colombia, her native country, where she has existing relationships with other Colombian music artists. Northern Cree, who are powwow singers, have toured the US powwow circuit extensively. Classical musician Cris Derksen has toured and toured classical music festivals and venues in Europe and elsewhere.

Figure 7: Key Territories for Indigenous Music Exports

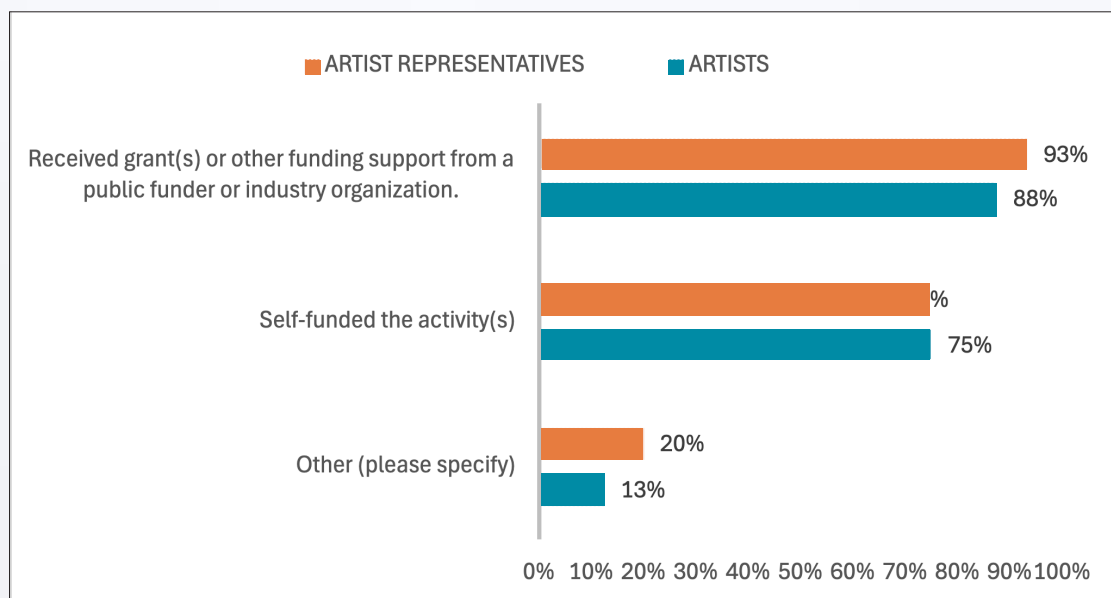


3. FUNDING FOR EXPORT ACTIVITIES

3.1 A Majority of Respondents Self-Funded Their Export Activities

Three quarters of artists and two thirds of artists' representatives surveyed have had to finance their own export activities. One respondent said they received support from their label. (See Figure 8.)

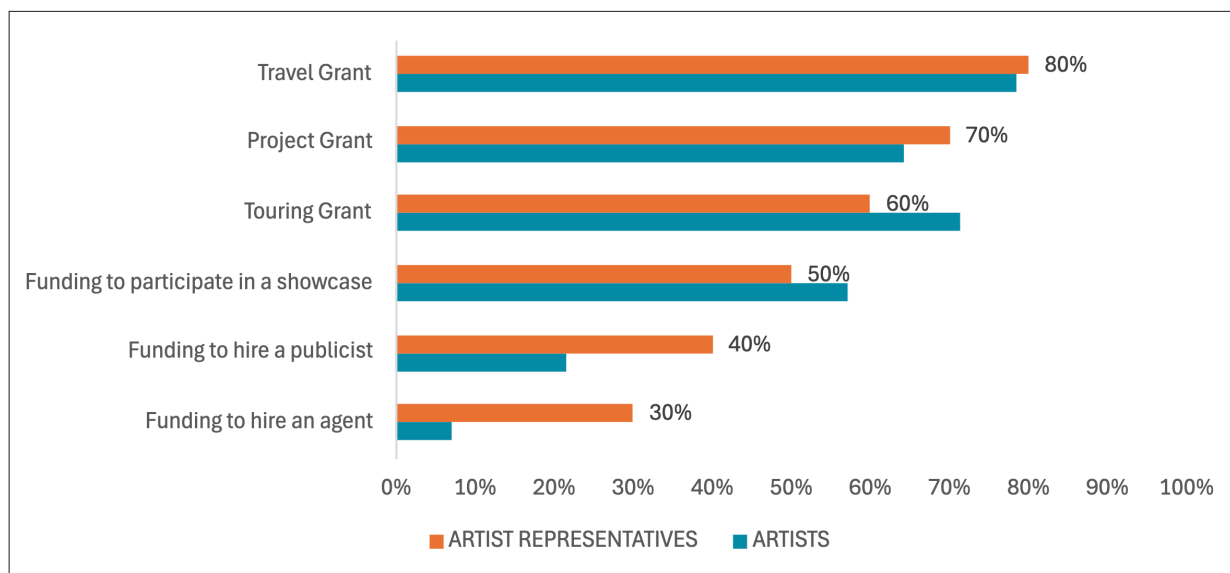
Figure 8: Sources of Financing for Indigenous Music Export Activities]



3.2 Federal and Provincial Sources of Funding Are Most Important to Export Music

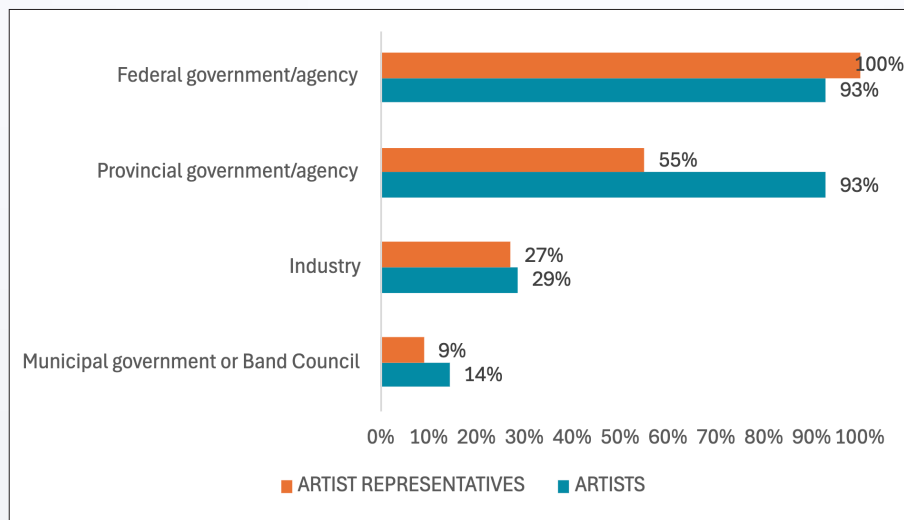
As shown in Figure 9, the most important type of support accessed for export activities has been grants for travel, followed by touring grants, project grants (for export), and funding to participate in a showcase. According to one funder interviewed, about half of all travel grant applications received by their organization are funded. There was less access by artists to funding for the hiring of a publicist or booking agent. Specifically, artists are accessing funding provided by federal or provincial governments or agencies. The industry, municipal governments and band councils were accessed less frequently.

Figure 9: Types of Support Accessed for Export Activities



Amongst artists' representatives, federal government funding is most important to support export activities on behalf of Indigenous music artists. Industry refers to a range of activities funded by various music organizations. (See Figure 10.)

Figure 10: Sources of Funding Accessed for Export Activities

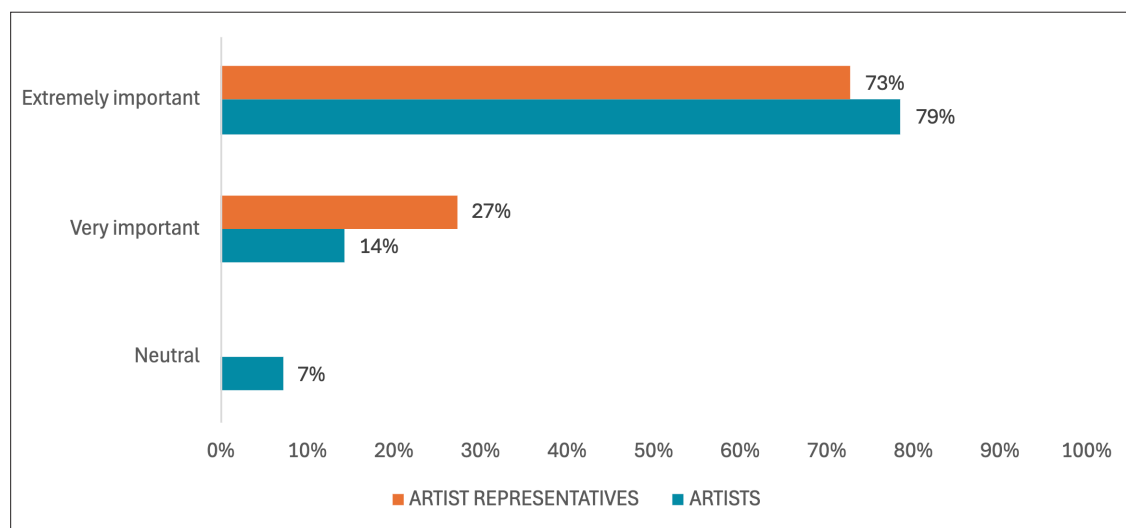


More than 93% of artists surveyed and 100% of artists' representatives said that the funding support they received from federal and provincial sources was extremely important or very important to the successful export of Indigenous music.

Development and other funding from the Canada Council for the Arts, Canadian consulates abroad and touring grants were said by artists to have had the greatest impact on the development of artists' international careers.

For their part, artists' representatives pointed to the Canada Council for the Arts and the StarMaker Fund, and travel, touring and project funding as most impactful on the international career development of the Indigenous artists they represent. (See Figure 11.) Zero (0) respondents indicated that their funding was not important.

Figure 11: Importance of Funding to Successful Exporting



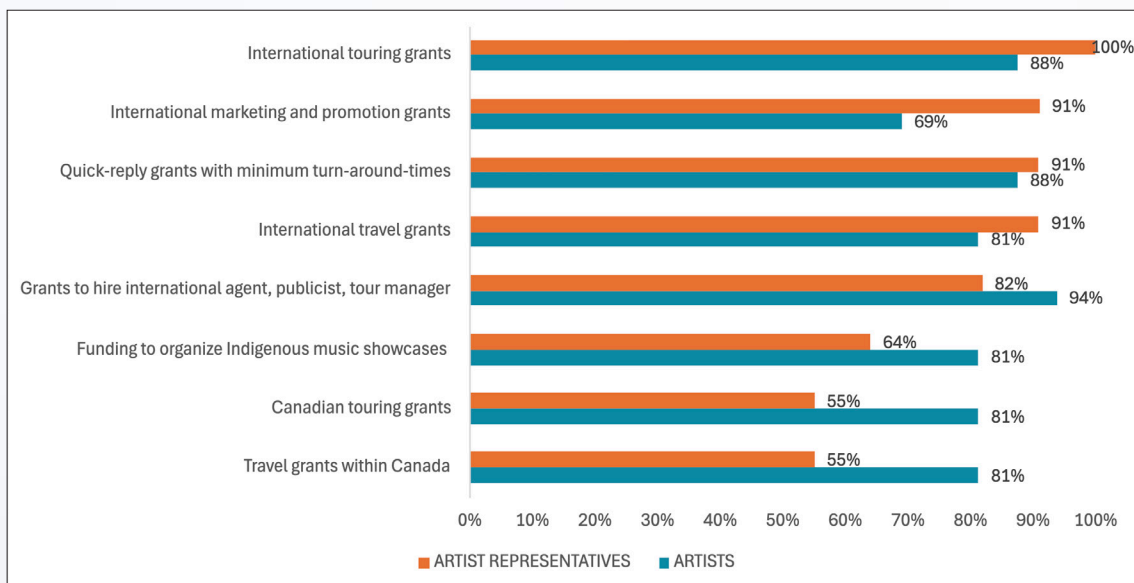
3.3 Greater Access to Funding is Needed to Support Indigenous Music Export Activities

Stakeholders surveyed noted that greater access to funding is needed to undertake export related activities. The following types of support were amongst the top five priorities of artists as well as artist representatives surveyed, selected by over 80% of respondents: international touring grants, quick-reply grants with minimum turn-around times, international travel grants and grants to hire an international agent, publicist or tour manager. The top funding priorities cited by artists were the need for funding to hire international agents, publicists and tour managers followed by funding for touring to international venues (i.e., project grants), and travel grants to support international touring. (See Figure 12.)

Artists also indicated a higher priority for funding in the domestic market to support their export ambitions. Over 80% of artists also indicated a high priority for funding to organize Indigenous showcases, travel grants within Canada and Canadian touring grants.

For their part, artist representatives had a higher focus on international marketing and promotion.

Figure 12: Support Needed to Successfully Export Indigenous Music



Stakeholders surveyed indicated that funding is needed to support music creation, touring and travel in Canada, promotion of music in Canada, professional development and funding to hire Canadian publicists, booking agents and tour managers.

The Canada Council's Indigenous-led program, Creating, Knowing and Sharing provides support to the sector with grants to artists to produce

their work, and for professional travel. These grants are seen as decisive in the development of artists' careers, allowing artists to advance their work and their international ambitions. Stakeholders also acknowledged that where available, provincial grants are also helpful.

Quicker turn-around times are a high priority for artists wishing to travel to respond to international opportunities. One challenge with all grants is the slow turn-around time, which can force artists to assume financial risks with respect to travel costs, without knowledge of whether or not they have been successful in their grant applications.

Artists identified the need to help fund Indigenous music showcases at international market events in Canada and in international places.

3.4 Funding is Needed to Strengthen Export Development Training for Artists and Teams

Sixty-nine percent (69%) of artists and their representatives surveyed identified a need for more professional development opportunities. This question was expanded upon by interviewees, who pointed to exemplary opportunities that currently exist, but which are too few. A consistent observation amongst interviewees is the urgent need for more opportunities to develop artists and managers' business skills, and greater understanding of international markets and how best to leverage opportunities. As noted by interviewees, Indigenous music artists and their representatives need greater access to all types of professional development opportunities to develop their business skills, to network and expand their business relationships, and in particular, to enhance their ability to plan export activities and consolidate their export-readiness.

There are currently a small number of Indigenous-led programs that provide training, mentorship and funding to Indigenous artists and managers, as well

as to professionals working in technical positions in the industry. The music programs of Indigenous-led organizations such as those of the First Peoples' Cultural Council in British Columbia, and InPath in Quebec, amongst others, provide training and professional opportunities for emerging music artists.

The Indigenous music sector also has access to a small number of exemplary programs designed and delivered by Indigenous leaders embedded within non-Indigenous organizations. Notable amongst these are the Indigenous Music programs of Manitoba Music, which provides training to Indigenous musicians and managers to support successful exporting.

However, opportunities are not consistently available across the country, and may not be tailored to the specific development needs of Indigenous artists. Interviewees spoke of the importance of accessing Indigenous-led programs designed with knowledge and input of Indigenous music professionals. These have the greatest potential to reach Indigenous clientele and were generally seen as more relevant to their needs.

3.5 Funding is Needed to Support the Domestic Indigenous Music Industry

Interviews revealed that Indigenous-led and -owned music organizations provide critical infrastructure to support development and growth in Canada and abroad but lack access to funding. The sector's development has been spurred by increased momentum in recent years. Indigenous-owned and -led music businesses have been established with a view to providing culturally safe services to Indigenous artists. Labels such as Ishkōdé Records and artist-owned labels such as Radicalized Records, artist management companies such as Ogichidaa Arts and Red Music Rising, as well as Nagamo Publishing, a global rights clearing house for Indigenous music, are just a few recent examples of Indigenous music businesses arising in this burgeoning sector.

For its part, the International Indigenous Music Summit, now in its fourth year, is providing Indigenous music artists with opportunities to showcase their work to international buyers, and to strengthen their international business networks. The newly created National Indigenous Music Office, recommended by APTN's seminal profile of the Indigenous music sector, and individual industry initiatives, such as the launch earlier this year of Saskatchewan Indigenous Music Association, provide further evidence of growth within the sector. While dynamic, growth in this sector is hampered by a lack of access to funding. Indigenous owned- and -led organizations struggle with systemic barriers that limit their access to funding and threaten their sustainability and growth and by extension, that of the sector.

4. FUTURE OPPORTUNITIES

4.1 Focus on International Showcases, Festivals and Touring in the Coming Year

Three quarters of Indigenous artists and their representatives surveyed indicated plans for Indigenous artists to perform at an international showcase or at an international festival. More than half of Indigenous artists surveyed are touring internationally as a featured artist or opening act.

As shown in Figure 13, almost 70% of those surveyed said they were seeking international press and media coverage, 63% are planning international sale and distribution of their recorded music and 56% are planning to engage an international publicist. Another 50% are planning to appear on international radio and television. Only 13% said they plan on participating in a government Trade Mission.

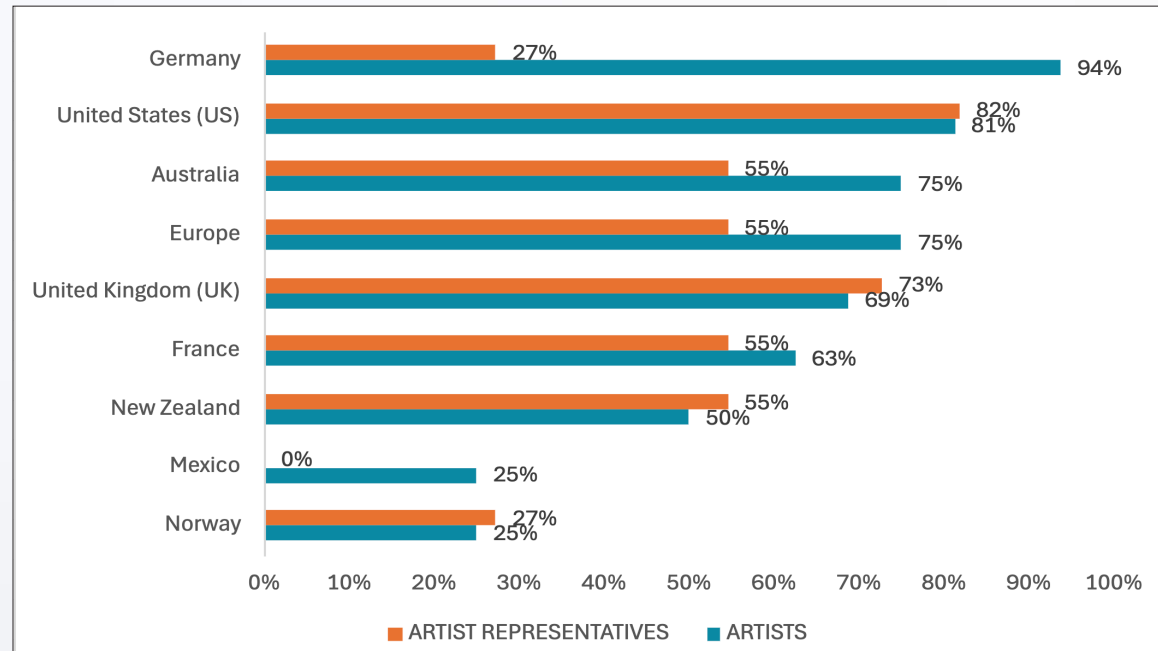
Figure 13: Indigenous Artists' Planned Export Activities over the Coming Year



4.2 Market Opportunities Include the United States, Europe, Australia and New Zealand

Amongst respondents the US, Australia, Europe, the UK, France and New Zealand present the greatest potential for exporting opportunities. Norway and Mexico are also seen to present opportunities. Figure 14 shows that artists identified Germany (94% of respondents), followed by the US, as having the greatest export potential. Amongst artists' representatives, the US was most often perceived to have the greatest potential for exporting Indigenous music (82%), followed by the UK (73%).

Figure 14: Territories Identified as Having the Greatest Export Potential for Indigenous Music



4.3 Festivals and Markets Support More Representation by Indigenous Music Artists

All of the festivals and markets that were consulted for this study have featured or presented Indigenous music artists in the past and are interested in doing so again in future editions of their events. It was pointed out that Indigenous artists enjoy greater visibility and exposure when presented together with non-Indigenous artists, particularly when the latter already have a high profile.

Survey respondents noted that opportunities for funding and sponsorships are considerations when selecting artists for inclusion in their events. Funding support would also facilitate showcasing.

4.4 Selection by International Markets and Festivals is Highly Competitive

International showcase events, festivals and markets base their decisions first and foremost on artistic quality, noting that artists are competing with other artists on an international level for coveted spots at international events. Some festivals noted that they must be very selective. Amongst the criteria used by festivals and markets when selecting artists for inclusion in their event, the most oft cited criteria by survey respondents were an artist's experience with live performance, and the music they have released in the past five years.

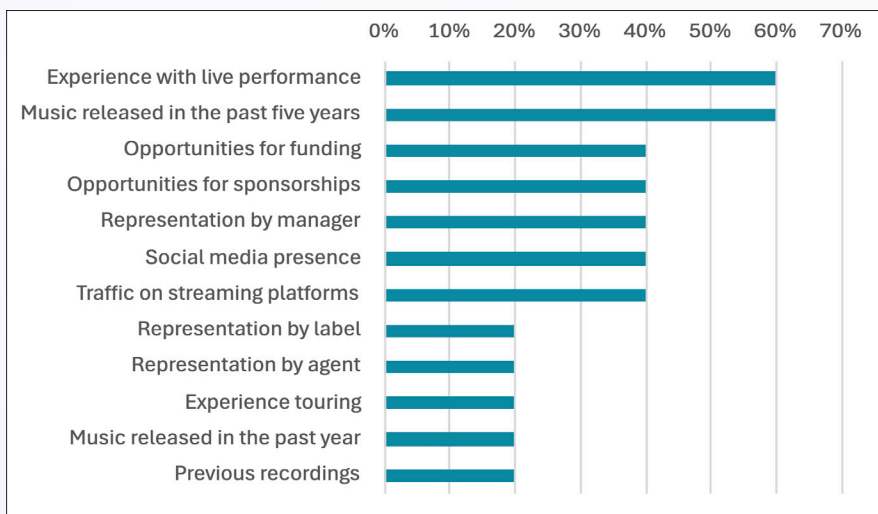
Social media presence and traffic generated on streaming platforms are also considerations. It was pointed out that promoters and presenters are increasingly focused on data analytics and that artists should be working to enhance their digital followings. Representation by a manager is more significant than representation by a label or agent. (See Figure 15.) Financing for management strategies was said to be essential for the development and circulation of Indigenous music. Artists' potential export-readiness

is considered when selecting artists for international showcasing within Canada. In some cases, buyers may consult with showcase organizers to confirm the export-readiness of artists.

According to interviewees, artists living within Indigenous communities face unique challenges to their export readiness, including their lack of access to industry infrastructures and training, lack of access to financing and to credit, and additional travel requirements for family members and for access to health care abroad, amongst others.

All of the festivals interviewed are interested in presenting more Indigenous music artists at their events. Some festivals pointed to the benefits of presenting lesser-known artists, including some Indigenous artists, on the same bill with more established artists, providing enhanced opportunities to get in front of buyers and audiences. There was also interest expressed in cultural exchanges aimed at Indigenous artists, such as co-writing residencies for song-writing.

Figure 15: Criteria Used by Festivals and Markets when Selecting Artists for Inclusion in Their Event



5. SUMMARY CONCLUSIONS

5.1 Indigenous Music is Being Exported Abroad by Artists and Their Representatives

Indigenous artists are exporting their music to the United States, Australia, Germany, the UK, France and other parts of Europe. A lesser percentage are also exporting to New Zealand and Mexico. They are performing at international showcases and festivals, streaming their music internationally, selling and distributing their recorded music internationally, touring, signing recording and

licensing deals, appearing on international radio and television and generally conducting business meetings. Indigenous artists are also hiring international publicists and booking agents to help with their export activities.

There is less participation in government led trade missions and signing of publishing deals. More export activities are taking place when an Indigenous artist has retained management services and in fact those artists that have representation have access to more established international networks, which are critical for the development and circulation of Indigenous music internationally.

5.2 Indigenous Artists and Their Representatives Could Significantly Expand Exports

Indigenous artists and representatives are not able to seize all the international opportunities that exist because of lack of access, or lack of timely access, to funding. There are opportunities to expand the export of music as demonstrated

by both the plans of artists and their representatives in the coming year and the interest expressed by international markets and festivals in showcasing more Indigenous music. Indigenous artists are planning to perform at international showcases and festivals. More than half are touring internationally as a featured artist or supporting act. They are also planning to appear on international radio and television. However artists indicated that they need funding support to engage an international publicist, attract international press and media coverage, and assistance with international sales and distribution of their recorded music.

All of the festivals and markets that were consulted for this study have featured or presented Indigenous music artists in the past and are interested in doing so again in future editions of their events. When selecting artists for inclusion in their events, programmers base their decisions on artistic quality, the artist's experience with live performance, and the music they have released in the past five years. Social media presence and traffic generated on streaming platforms are also considerations. These events are interested in showcasing Indigenous artists, however, they indicated a preference for funded showcases, such as showcases funded within Canada, or that might benefit from a sponsorship arrangement.

5.3 Lack of a Supportive Domestic Infrastructure Hinders Export Growth

The biggest barrier to expansion of Indigenous music exporting is the lack of a supportive domestic infrastructure, as demonstrated through the lack of funding available to Indigenous artists, Indigenous music entrepreneurs and their organizations. Indigenous-led and -owned music organizations provide critical infrastructure and trusted, culturally safe services but are themselves challenged by a lack access to funding. Indigenous artists spoke of the great importance of having access to trusted Indigenous players such as labels, publishers, agents, and of course artist managers, to help them navigate their careers in ways that felt culturally safe.

The majority of artists and managers are financing their own export activities. When they do access funding, it is from provincial and federal sources. They describe the most important type of support accessed for export activities as grants for travel, followed by touring grants, project grants, and funding to participate in a showcase. It is more difficult to access funding to hire publicists and booking agents, needed to develop impactful tours.

III. Pathways to International Markets: Profiles of Indigenous Artists

1. SUMMARY OVERVIEW

Indigenous artists profiled in this section have achieved success at home and abroad. These artists have invested in the creation of their music and released multiple award-winning LPs and Eps. They have garnered domestic and international attention, and cultivated their audience through domestic and international touring and engaging with their fans online. Each of the artists profiled has a unique sound, defining in some cases new genres for Indigenous music. Also shared by the artists is a commitment to advancing the development and growth of Indigenous music. In many cases, having access to

Indigenous mentors, and high-profile collaborators like Bjork, to skilled producers, and to networks of other Indigenous and non-Indigenous music artists, has contributed to these musicians' success both at home and abroad. Winning or being nominated for major awards, such as the Juno Awards, the Polaris Prize, and the American Grammy Awards, has advanced careers. Access to seasoned managers and established labels has taken the careers of some artists to even greater success.

2. CRIS DERKSEN

MUSICAL RELEASES

- » *Orchestral Powwow Project* (2015) on Tribal Spirit Powwow
- » *The Collapse* (May 2013) Self-released
- » *The Cusp* (2010) Self-released

AWARDS

- 2011 Canadian Aboriginal Music Award – Album of the Year
- 2009 Aboriginal Peoples Television Network Rising Star Award

The Sound

Cris Derksen is an internationally respected two-spirit Juno Award–nominated Cree cellist who hails from the North Tall Cree reserve in Northern Alberta. A graduate of UBC’s music program, Derksen is known for her unique musical sound which blends classical music with folk, dance and electronic beats with traditional Indigenous music to create her own style of contemporary music. Mary Dickie, writing in *Music Works*, has described her music as “crisscrossing genres, cultures, styles, and attitudes with evident pleasure and apparent ease.”

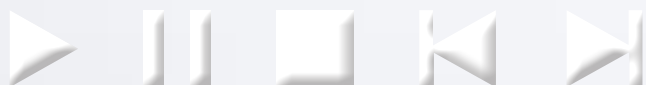
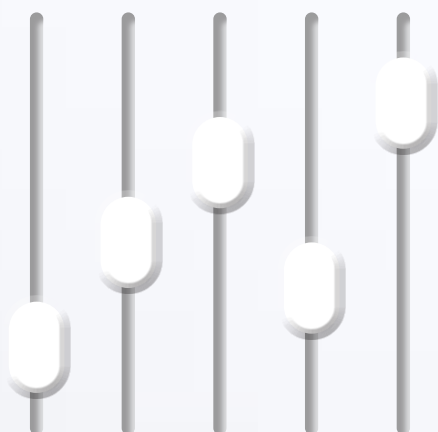
Success at Home and Abroad

As a composer Cris Derksen has written music for choral, symphonic, film, theatre and dance. She has been commissioned by major Canadian orchestras and new music ensembles, including the Calgary Philharmonic, Thunder Bay Symphony Orchestra, Woodwind International, the Banff Centre for Arts and Creativity, Luminato Festival and the Art Gallery of Ontario amongst others. Her compositions have been performed at the Luminato Festival, the Collingwood Chamber Festival and Vancouver’s PuSh Festival.

One of her most notable albums is 2015’s *Orchestral Powwow Project*, released by Tribal Spirit Music. Combining traditional music elements with classical orchestral sensibilities, the live version of *Orchestral Powwow* involves a full orchestra together with powwow singers and drummers, hoop dancer, and cellist. For the album, Derksen drew on and incorporated samples from Tribal Spirit’s library of powwow music. The project was nominated for a 2016 Juno Award for Instrumental Album of the Year.

Thanks to an Ontario Arts Council grant, Derksen spent a week in 2015 being mentored by Buffy Sainte-Marie.

Interviewees noted the importance of business networks for the development and circulation of Indigenous music in international markets. However, a mere 6% of Indigenous artists surveyed reported having an established international network in the music industry.



In 2019, Derksen composed and produced Maada'ookii Songlines, an impressive choral piece for 250 singers for the Luminato Festival. This 20-minute large scale work brought together singers representing 11 community choirs from across the greater Toronto area (GTA). A seven-woman drumming circle and two children's choirs opened the show, summoning the audience to the performance. The show was described as "the expression of people coming together to freely give and receive something that speaks directly to community."

As a performer Derksen has played nationally and internationally, both solo and with some of Canada's finest artists, such as Tanya Tagaq, Buffy Sainte Marie, Naomi Klein, and Leanne Simpson. She has toured Germany, France, Spain, Norway, Czech Republic, Mexico, Sweden, and the United States, as well as Hong Kong, Australia, Mongolia, and Sweden. She has performed with the Beat Nation Live Collective, Kanye West, Kinnie Starr, Rae Spoon, and traditional pow wow groups. The genre-defying classical cellist has close to 3000 monthly listeners on Spotify.

3. DIGGING ROOTS

MUSIC RELEASES

ALBUM RELEASES

- » *Seeds* (2006) on Jericho Beach
- » *We Are* (2009) on Odeimin Music
- » *For the Light* (2014) on Sugar Bush Music
- » *Zhawenim* (2022) on Ishkōdé Records/
Virgin

SINGLES

- » "Ak47" (2016) self-released
- » "The Healer" (2021) on Ishkōdé Records
- » "Cut My Hair" (2021) on Ishkōdé Records
- » "Skoden" (2022) on Ishkōdé Records

AWARDS

- 2023 - Juno Award - Contemporary Indigenous Group of the Year
- 2023 - Summer Solstice Indigenous Music Awards - Social Voice
- 2023 - Alan Slaight Humanitarian Award
- 2018 - WOMEX - Professional Excellence Award
- 2015 - Canadian Folk Music Award - Indigenous Songwriters of the Year
- 2015 - Cobalt Prize - Contemporary Blues Composition for "Hwy 17"
- 2010 - Juno award - Aboriginal Album of the Year for *We Are*
- 2010 - Aboriginal Peoples Choice Award - Best Blues Album
- 2010 - Native American Music Award - Best Pop Album for *We Are*
- 2007 - Canadian Aboriginal Music Award - Best Group
- 2007 - Canadian Aboriginal Music Award - Best Music Video
- 2007 - Indian Summer Music Awards - Best Blues Album

The Sound

Digging Roots is the Juno Award-winning musical duo of ShoShona Kish (vocalist) and Raven Kanatakta (guitarist and music director, originally from Winneway, Quebec, (Kanatakta) and the Batchewana First Nation in Northern Ontario (Kish), this creative pair merges elements of traditional Indigenous influences with roots styles of music like blues, hip hop and folk rock into a “joyful message of resistance.” Ro-ots Music Canada has described their music as, “Uncompromising and uplifting, powerful and tender all at the same time.”

Digging Roots’ Juno Award-winning fourth album *Zhawenim* (To Love Unconditionally) integrates the traditional Anishinabek Song Lines composition technique of tracing melody and rhythm from the contours of the land with modern Eurocentric techniques of composition. In an interview with SOCAN Magazine, Kanatakta discussed how the songwriters have used Songlines for a long time. “It started when Shoshona’s great aunt came over and told us about her residential school experience. She also talked about how we used to traditionally write

music, which was following Songlines that follow the contours of the land.”

The duo’s Juno nominated third album, *For the Light*, featured collaborations with Tanya Tagaq, DJ Bear Witness of *A Tribe Called Red* and Kinnie Starr, who also produced the album.

Success at Home and Abroad

The multi-award winning *Digging Roots* have headlined festivals across Canada and toured the world, performing at festivals and listening rooms throughout Canada, the US, Europe and Australia. The multi-award winning band currently enjoys a following of over 13K monthly listeners on Spotify.

Kish and Kanatakta’s commitment to music extends to ensuring equity and representation through industry advocacy and through their work in establishing Indigenous-led and -owned organizations: notably, the International Indigenous Music Summit and Ishkōdé Records, to advance the careers of other Indigenous

musicians. The International Indigenous Music Summit is currently in its fourth year and provides international networking and showcasing opportunities for Indigenous artists. In 2021 Kish partnered with Métis folk singer-songwriter Amanda Rheaume to form Ishkōdé Records. The label seeks to amplify Indigenous voices, in part through a distribution deal with Universal Music. “It is very exciting to witness and be a part of this groundswell,” says Kish. “I see the brilliance, innovation, and creativity coming out, first-hand, every day, and I feel really grateful to have access to that bottomless well of inspiration.”

4. ELISAPIE ISAAC

MUSIC RELEASES

ALBUM RELEASES

- » *The Ballad of the Runaway Girl* (2018) on BonSound
- » *Travelling Love* (2012) on Pheromone Recordings
- » *There Will Be Stars* (2009) on Pheromone Recording

SINGLE RELEASES

- » “Heart of Glass”

RELEASE WITH ALAIN AUGER

- » *Taima Project* (2004)

AWARDS

- 2021 - Elisapie was made Compagne des arts et des lettres du Quebec by the Conseil des arts et des lettres du Quebec.
- 2020 - Félix Award - Indigenous Artist of the Year
- 2019 - Gamiq Award for Folk Album
- 2019 - Félix Award - Album of the Year, Other Languages
- 2013 - Félix Award for Best Anglophone Album
- 2012 - Eval-Manigat prize for Multicultural Song
- 2011 - Teweikan Awards - Ambassador Prize
- 2005 - Juno Award for Aboriginal Album of the Year

The Sound

Elisapie Isaac, known professionally as Elisapie, is an acclaimed Inuit singer-songwriter originally from Salluit, Nunavik. Based in Montreal, she began performing in 1998 as part of the duo Taima (“enough” in Inuktitut), with Alain Auger.

As a solo artist Elisapie has released three solo albums. A fourth album is expected this fall. *The Ballad of the Runaway Girl* has been called arguably the most significant work in the singer-songwriter’s career.

Inspired by the life of Inuit singer, Willie Thrasher, who spent his childhood in Southern residential school in the 1950s, the album describes “a spiritual journey involving questions of identity and acceptance.” *The Ballad of the Runaway Girl* was nominated for the 2019 Juno Award for Indigenous Album of the Year and shortlisted for the Polaris Music Prize in the same year.

The album garnered rave reviews and opened doors for Elisapie in France. *Rolling Stone France* called it “a delicately violent album that seduces as much as it questions,” while the French daily *Le Monde* sent a journalist to Nunavik to interview the artist, calling her

“the north star in the land of the Inuit.” NPR described Elisapie’s work as “synthesizing stories from her eventful life with hypnotic arrangements that channel ‘70s rock, indigenous folk music and the low, moody rumble of barnstormers like Tom Waits.” In 2023, she released an Inuktitut version of the song “Heart of Glass”, originally recorded by the American punk rock group *Blondie* in 1979.

Success at Home and Abroad

Taima’s 2004 self-titled debut album won the 2005 Juno Award for Aboriginal Album of the Year, launching the band’s international career. Followed touring in Nunavik, Iqaluit, Quebec and Canada and success at the Glastonbury Festival in England.

With *The Ballad of the Runaway Girl*, Elisapie has toured North America and Europe and played at a multitude of venues and festivals around the world. At the invitation of Yannick Nézet-Séguin, the artist has performed with the Orchestre Métropolitain de Montréal. She has performed at the SummerStage Festival in Central Park, and at the offices of NPR in her own Tiny Desk session.

She has an active presence on social media as a performer and activist. Visible on Indigenous playlists as well as her own channels, Elisapie is followed by over 111K monthly listeners on Spotify, 8K subscribers on YouTube, and her work has been viewed over 206K times on Tiktok.

In addition to her music, Elisapie has amassed a following for her award-winning work in film and television. An accomplished filmmaker in her own right, Elisapie was cast in the title role of *VFC* (2021), a Quebec-based horror film and AR experience, directed by C.S. Roy. The following year she appeared in *Motel Paradis*, a crime series on Club illico. In 2022 she produced the *Grand Solstice*, the second annual television show celebrating National Indigenous Peoples' Day for Radio-Canada.

5. LIDO PIMIENTA

MUSIC RELEASES

ALBUM RELEASES

- » *Miss Colombia* (2020) on ANTI Records
- » *La Papessa* (2016) - self released

EP RELEASE

- » *Color* (2010) – self released

AWARDS

2017 - Polaris Music Prize for *La Papessa*



The Sound

Born in Colombia and based in Toronto, Lido Maria Pimienta Paz, known under her stage name Lido Pimienta, is an Afro-Colombian singer and songwriter with an Indigenous heritage as Wayuu. After immigrating to Canada at nineteen, Pimienta's remarkable debut with her EP *Color* at age 23 established her in the Latinx art pop underground, catching the attention of major players in South America's burgeoning digital cumbia scene. Singing in Spanish, her experimental sound blends electronic beats with looped Indigenous chants and Afro-Colombian beats that *Canadian Musician* has described as "an embrace of the Afro- and Indigenous traditions that is at once defiant, delicate and sweetly nostalgic."

Success at Home and Abroad

Pimienta first broke through to mainstream audiences in 2016, when her self-released first LP, *La Papessa*, was awarded the Polaris Music Prize. According to *Pitchfork*, the win was all the more remarkable as "despite the global boom of reggaetón and cumbia, Latin genres remain critically underrepresented in Canadian music." *The Globe and Mail* called her "the future of Canadian rock and roll", and dubbed her the "artist of the year".

A grant from the Ontario Arts Council was instrumental in the production of *La Papessa*, which was three years in the making. Following the release of *Color*, Pimienta undertook to acquire her own production skills and the grant allowed her to oversee all of the production of *La Papessa*. Of this album, Pimienta said to the CBC, "it was nice to understand really what it was to produce, to be a producer, to have artistic control and really have my voice in every aspect...It was more experimenting and trying things out. I had an opportunity to make mistakes and grow."


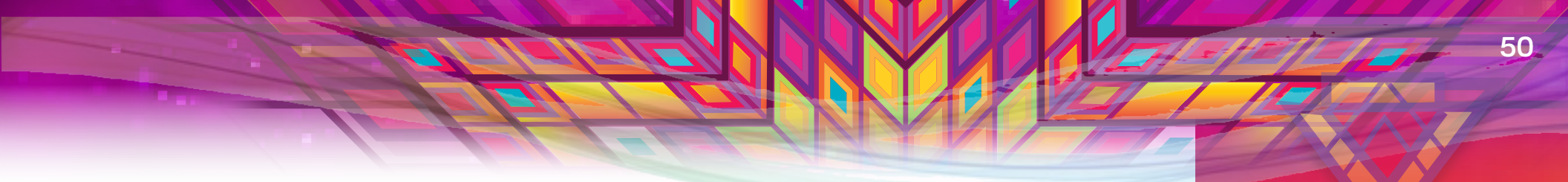
Her most recent album, *Miss Colombia*, garnered rave reviews from *Pitchfork*, *NPR*, *Exclaim!* and *Rolling Stone*, among many others. *Get in Her Ears* described it as, "a sublime offering that eludes genre definition... Her unrivalled artistic confidence, and tenacious appetite for creating multi-layered music that defies explicit definition, is something we look forward to hearing more of in the future." *Pitchfork* gave *Miss Colombia* an 8.0 rating, while *Stereogum* described it as "some of the most uniquely stirring pop music in recent memory." *Miss Colombia* was nominated for the 2020 Grammy Award for Best Latin Rock or Alternative Album and the 2020

Latin Grammy Award for Best Alternative Music Album. The album was also shortlisted for the 2020 Polaris Music Prize.

For over a decade, Lido Pimienta has performed around the world. She has toured throughout Canada, the US and Colombia. She has toured Europe, including concerts in Spain, Germany, France, the UK and The Netherlands. In 2021, Pimienta became the first woman of colour and one of only a few female composers ever to be commissioned to compose a score for the New York City Ballet.

Popular online, Pimienta has almost 350K monthly listeners on Spotify. On that platform her song “Nada” has enjoyed over 7 million listens, while “Eso Que Tu Haces” has been streamed over 3 million times (and over 2 million times on YouTube). Lido Pimienta is also followed by 110K fans on Instagram.

Pimienta’s work includes a long list of collaborators, including numerous Latin American musicians, who have helped her extend her reach. Matt Smith, aka Prince Nifty, collaborated with her on the production of *Miss Colombia*. Her collaboration with Nelly Furtado on her soon to launch web series, *Lido TV*, allowed Pimienta to gain experience working in a studio with leading producers.



In many cases, having access to Indigenous mentors and high-profile collaborators like Bjork, to skilled producers, and to networks of other Indigenous and non-Indigenous music artists, has contributed to these musicians’ success both at home and abroad.

6. NORTHERN CREE

MUSIC RELEASES

ALBUM RELEASES

- » *Ôskimacîtahowin: A New Beginning* (2022) self-released on Band Camp

ON CANYON RECORDS ISELECTED TITLES

- » *When it's Cold: Cree Round Dance Songs* (2019)
- » *Nîtisânak: Brothers and Sister: Pow-Wow Songs Recorded Live at Shakopee* (2018)
- » *It's a Cree Thing* (2016)
- » *Ewipihcihk* (2014)
- » *True Blue* (2009)
- » *Nikamo "Sing"* (2005)
- » *Round Dance Jam* (2002)
- » *Northern Cree, Young Bird – Double Platinum* (2001)

AWARDS

2017 - Juno Award for Classical Album of the Year – Large Ensemble for the album *Going Home Star*, composed by Christos Hatzis for the Royal Winnipeg Ballet



The Sound

Northern Cree is a nine-time Grammy nominated and multiple Juno nominated pow wow and round dance group from Treaty 6 territory in Canada. With performances at the Junos and Grammys, and contemporary artists sampling their music, Northern Cree have been called “one of the best acts and most respected and influential groups in powwow music anywhere in the world.” They have been described as “remarkably unified and powerful, attention-grabbing, and energetic.”

Also known as the Northern Cree Singers, the group was formed in 1980 by Randy Wood, with brothers Charlie and Earl Wood, members of the Saddle Lake Cree Nation, along with Ferlin McGillvary, Steve Wood, Joel Wood and Conan Yellowbird. The sixteen or more active members of the group come from all over Treaty 6 land, including the Louis Bull Tribe, Samson First Nation, Frog Lake First Nation, Onion Lake Cree Nation, Sweetgrass First Nation, Poundmaker Cree Nation, and Sunchild first Nation — as well as the Menominee Indian Tribe of Wisconsin.

Success at Home and Abroad

Northern Cree released 36 recordings over 22 years with Canyon Records, for which they won numerous awards, including multiple Nammys (Native American Music Awards), Canadian Aboriginal Music Awards, Aboriginal Peoples’ Music Choice Awards and Indian Summer Music Awards. They have taken many first place positions and have been awarded “best drum group” at powwow competitions across North America. They have been described as “inspirational to many other drum groups and powwow musicians.”

Northern Cree’s latest album, *Ôskimacîtahowin: A New Beginning* (2022) was produced by electronic music duo The Halluci Nation (Bear Witness and Tim Zoolman) and recorded at the National Music Centre with funding from the Canada Council for the Arts. For the first time the group owns the album outright, having kept their rights to the master recording and publishing. After releasing so many live recordings, the group was pleased to be able to work with such a high level of production. In 2023, *Ôskimacîtahowin: A New Beginning* was nominated for a Juno Award for Traditional Indigenous Group of the Year.



A consistent observation amongst interviewees is the urgent need for more opportunities to develop artists and managers' business skills, and greater understanding of international markets and how best to leverage opportunities.



Northern Cree have collaborated with rappers and Indigenous electronic stars. A decade ago, M.I.A. and Santigold sampled the band for their song "Get It Up". In 2016 Northern Cree appeared on the EP *PowWowStep*, released by DJ Shub's (formerly of *A Tribe Called Red*). In addition to their popular presence on the North American powwow circuit, Northern Cree have performed for global audiences, opening for *The Tragically Hip* at London's Trafalgar Square and performing at the pre-telecast Grammy awards ceremony in L.A. in 2017, a show that famously "shook the room". In 2023, Northern Cree teamed up with Juno nominated Aysanabee at the Juno Awards live gala, performing "We Were Here (It's in My Blood)" at the live gala in March.

Northern Cree are lighting up social media, with almost 12 million views on Tik Tok and almost 50K monthly listeners on Spotify, and 21K subscribers on YouTube. A further 200K follow them on Facebook.



7. TANYA TAGAQ

MUSIC RELEASES

ALBUM RELEASES

- » *Tongues* (2022) on Six Shooter Records
- » *Tongue North Star Remixes* (2022) on Six Shooter Records
- » *Retribution* (2016) on Six Shooter Records
- » *Animism* (2014) on Six Shooter Records
- » *Anuraagtuq* (2012) on Les Disques Victo
- » *Auk/Blood* (2008) on Jericho Beach Music
- » *Sinaa* on (2005) on Jericho Beach Music

EP RELEASES

- » *Toothsayer EP* (2019) on Six Shooter Records

VINYL

- » *Split Tooth* (2018)

AWARDS

- 2016 - Order of Canada
- 2015 - Juno Award – Indigenous Artist of the Year
- 2014 - Polaris Music Prize
- 2014 - Canadian Folk Music Award - Pushing Boundaries Award
- 2005 - Canadian Aboriginal Music Award – Best Female Artist
- 2005 - Canadian Aboriginal Music Award – Best Producer/Engineer
- 2005 - Canadian Aboriginal Music Award – Best Album Design

The Sound

Tanya Tagaq Gillis (popularly known as Tanya Tagaq) is a Canadian Inuk throat singer, experimental musician and songwriter, who blends electronic, classical, punk and rock music with her own version of Inuit throat singing (traditionally a competition between two women). Described as “impactful, experimental and sometimes harsh,” Tagaq’s music protests “abuses perpetrated against women, the environment and Indigenous peoples.” The multi-talented Tagaq is also an acclaimed novelist and visual artist.

Born in Ikaluktutiak, Nunavut, Tagaq began to practice throat singing while at residential high school in Yellowknife, Northwest Territories. She developed her own solo form of Inuit throat singing while studying Fine Art at the Nova Scotia College of Art and Design University, where she obtained her degree. *The Wire* magazine said of her, "Tagaq projects sounds that carry the imprint of the body's secret contours and recesses, delving far beyond personal utterance, out beyond human identity, to summon voices from the flesh cavity haunts of animal spirits and primal energies".

Success at Home and Abroad

A collaboration with Bjork brought early international recognition, effectively launching Tagaq's career. As the story goes, Tagaq filled in for performer during the 2000 Great Northern Arts Festival and her performance impressed two audience members who relayed their experience to Bjork. The Icelandic superstar invited Tagaq to join her on her world tour the following year. Then in 2004 Tagaq sang on Bjork's album *Medúlla*.

From the beginning, Tagaq attracted critical recognition and nominations for the prestigious Juno awards, gaining visibility and a following in Canada and abroad. "Sinaa was nominated for five Canadian Aboriginal Music Awards. Her second album, *Auk/Blood* (2008) was nominated for two Juno Awards in 2009: Instrumental Album and Aboriginal Recording of the Year.

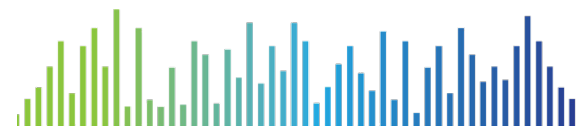
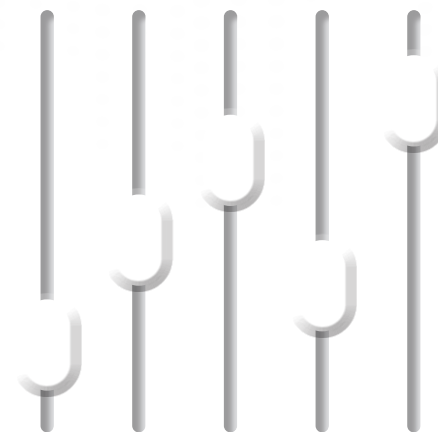
Tagaq's third album, *Animism* (2014) became her most commercially successful recording and her first US release, earning praise from the *New Yorker* for her "fearless lack of inhibition," as well as her "technical skill and her mastery of tradition." The album won the 2014 Polaris Music Prize, beating out stars like Drake and Arcade Fire. Tagaq's Polaris Prize performance, which included a scrolling list of 1,200 murdered and missing Indigenous women in Canada, was described as "intense and electrifying," and earned the artist a standing ovation. Introducing Tagaq at the awards ceremony, writer and musician Geoff Berner called the album "dizzily complex and sophisticated in structure," adding that, "it also completely hits you in your guts, in your soul."

Tagaq's fourth studio album, *Retribution* (2016) was lauded by critics and met with near unanimous acclaim. *Rolling Stone*'s Christopher R. Weingarten called it "her strongest outing yet," while the *Guardian* called it "a violent and stirring meditation on apocalyptic climate change." *Exclaim!* magazine marvelled that, "Tagaq achieves an experience as potent as, and analogous to, her live show," and called the album "immersive, cathartic, potentially even transformative."

Tagaq's fifth studio album, *Tongues*, was released in 2022, borrowing lyrics from the artist's "stunning" first novel, *Split Tooth*, published in 2018. The book won the 2019 Indigenous Voices Award and a 2019 Alcuin Society Award for Excellence in Book Design in Canada.

Tanya Tagaq has toured and entertained worldwide audiences for over two decades, playing in major cities across Europe, the US and Mexico. Her online following includes over 14K monthly listeners on Spotify and another 8 K subscribed to her website and to her YouTube channel, respectively. Her work has also attracted over 330K views on Tik Tok.

Tanya Tagaq is a Member of the Order of Canada, awarded for her "contributions to Canadian culture through her avant-garde Inuit throat singing." She has received two honorary doctorates: honorary Doctor of Fine Arts from NSCAD in 2015 and an honorary Doctor of Music from Laval University in 2017.



8. THE HALLUCI NATION

ALBUM RELEASES

AS THE HALLUCI NATION

- » *One More Saturday Night* (2021) on Radicalized Records

AS A TRIBE CALLED RED

- » *A Tribe Called Red* (2012) self-released
- » *Nation II Nation* (2013) on Tribal Spirit Music
- » *We Are The Halluci Nation* (2016) on Radicalized Records

AWARDS

2022 Juno Award – Electronic Album of the Year
 2018 Juno Award – Group of the Year
 2017 Juno Award – Electronic Album of the Year
 2017 Juno Award - Producer of the Year
 2014 Juno Award – Breakthrough Group
 2014 Juno Award – Electronic Album
 2013 Aboriginal Peoples Choice Awards for:
 Best Album
 Best Group
 Best Producer
 Best Album Cover

The Sound

The Halluci Nation, formerly known as A Tribe Called Red, is a Canadian electronic music group who blend instrumental hip hop and dubstep-influenced dance music with elements of traditional singing and drumming.

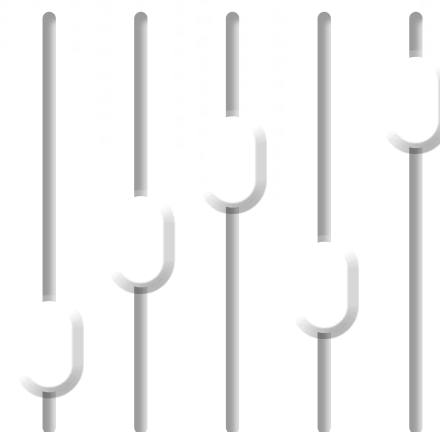
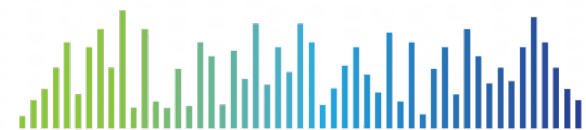
Their first album, which combined Indigenous drum group samples with house music elements, pioneered a new sound coined PowWowstep, a style of contemporary powwow music for urban First Nations in the dance club scene. Indigenous-owned label Tribal Spirit Music released the band's second album, *Nation II Nation*, on which were featured drum groups Black Bear,

Chippewa Travellers, Eastern Eagle, Northern Voice, Sheldon Sundown, Sitting Bear and Smoke Trail, drawn from amongst the label's catalogue of artists. *The Montreal Gazette* called ATCR "the most exciting thing happening in Canadian electronic music right now – and, arguably, in Canadian music, period." The group is currently comprised of Ottawa-based DJs Tim "Zoolman" Hill (Mohawk, of the Six Nations of the Grand River), and Ehren "Bear Witness" Thomas (Cayuga First Nation).

Success At Home and Abroad

Released for free online, ATCR's self-titled debut album was downloaded 5,000 times in six days. Following its release, *The Washington Post* named it one of the top ten albums of 2012. *Nation II Nation* was shortlisted for the 2013 Polaris Prize and was nominated for five Aboriginal Peoples Choice Music Awards. In 2014, ATCR won the Juno Award for Breakthrough Group of the Year, the first time an Indigenous artist had won outside the Aboriginal category.

In 2016 ATCR released a third album, *We Are the Halluci Nation*, a concept album inspired by the phrase coined by late Native American rights activist, musician and poet John Trudell. *Maclean's* magazine attributes the international cast appearing on *We Are the Halluci Nation* for opening doors for the group. *Pitchfork* called the album "critical listening for everyone".



In 2021, Bear Witness and Tim “Zoolman” Hill of ATCR reintroduced themselves as The Halluci Nation, coinciding with the release of their fourth album, *One More Saturday Night* under their own label, Radicalized Records.

The band has toured extensively, playing for audiences across Canada, Mexico and the United States, from L.A. to New York, and performed in the United Kingdom, Germany, Greece Norway and Australia. On the road they have “made beats in airports, hotels, and fishing lodges.”

The Halluci Nation and ATCR have been described as actively fighting misappropriation and misrepresentations of Native people. According to the Smithsonian, the group “recognize their responsibility towards their families, communities and other indigenous

people. Through seizing control of Native imagery and sounds, their music has taken Native issues to a global stage.”

For its part, The Guardian has enthused that, “Tribe’s approach has been to manage their image fiercely... They’ve refused to enter the Aboriginal category at the Juno awards and tapped into dubstep, rap and the sounds of other brown power movements so as to expand their message and reach. They understand that for culture to stay alive it has to go viral. Digital culture has given them a platform to do this, allowing them to reach thousands.”

The Halluci Nation currently has almost 250K monthly listeners on Spotify and over 207K subscribers on YouTube. Their followers on SoundCloud number over 74K.



IV. The Way Forward - Indigenous Music Export Strategy

1. CONTEXT

What follows is an Indigenous Music Export Strategy to increase the capacity of Indigenous artists and music entrepreneurs to export Indigenous music. The strategy also supports the aims of the Indigenous music sector to uphold narrative and music sovereignty.²⁸

This strategy is timely as the Indigenous music sector has recently been building momentum. As recently reported, “an emergence in recent years of Indigenous-owned infrastructure committed to managing and marketing people from the community” are “building their own foundation within Canada’s music industry”.²⁹ Indigenous-owned music companies like Red Music Rising, Nagamo Publishing, Ishkodé Records, Land Back Records and Hitmakerz are be making the Canadian music industry “more hospitable than ever to Indigenous artists.”³⁰

A National Indigenous Music Office has been established with a mandate to undertake advocacy, capacity building and development of relationships needed to grow the industry for Indigenous musicians, establish the foundations to uphold Indigenous narrative and music sovereignty, and Indigenous protocols to be respected and implemented in the industry. For its part, the International Indigenous Music Summit (IIMS) has recently completed its fourth successful iteration, connecting Indigenous artists and professionals from around the world, promoting relationship building and the participation of Indigenous music artists in key international markets.

The Indigenous Music Export Strategy that follows builds on activities already being undertaken in Canada and takes into account the challenges currently facing the Indigenous music sector to seize opportunities for

²⁸ Cultural sovereignty is seen as flowing from the inherent right of Indigenous peoples to self-determination, which is recognized in section 35 of the Canadian *Constitution Act* (1982). This right is also articulated in the *United Nations Declaration on the Rights of Indigenous Peoples* (2007), which was officially adopted by the Canadian government in 2016. See also Marcia Nickerson, “Building the Indigenous Music Industry and Developing an Indigenous Music Office, Prepared for the Indigenous Music Alliance, June 30 2021.

²⁹ Jenna Bencherit, “How Indigenous-owned record labels are changing the music industry in Canada,” in CBC News, July 4, 2023, retrieved from <https://www.cbc.ca/news/entertainment/indigenous-owned-record-labels-1.6894153>.

³⁰ Jenna Bencherit, 2023, Op. Cit.

growth in international markets. It is based on stakeholder perspectives gathered through the consultations and best practices on exporting that were identified in the literature from other jurisdictions. It also takes into account current public and private initiatives in the Canadian music industry needed to support the export of Indigenous music.

2. STRATEGIC DIRECTIONS

As can be seen in Figure 16, the proposed strategy has been developed around four mutually reinforcing strategic directions:

1. Finance the Growth of a Domestic Indigenous-owned and -Led Music Ecosystem
2. Strengthen Export Readiness of Indigenous Artists
3. Prioritize International Showcasing, Touring and Networking
4. Promote Discoverability of Indigenous Music on Streaming and Broadcasting Platforms

Figure 16: Four Strategic Directions to Increase Export Capacity



2.1 Finance the Growth of the Domestic Indigenous Music Ecosystem

.....
Our first strategic direction is to finance the growth of an Indigenous-owned and -led domestic music industry.

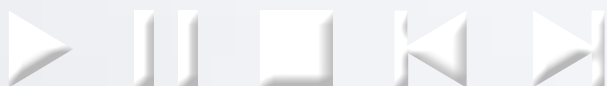
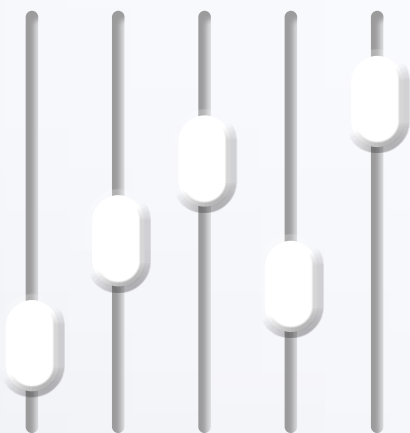
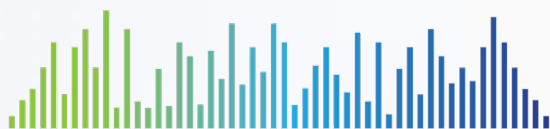
Increasing the export capacity of the Indigenous music sector depends on the existence and strength of a domestic infrastructure that supports all elements of the music ecosystem. The interviews conducted for this study conveyed that having access to Indigenous labels, managers, promoters, publicists, etc., is of critical importance to the success of Indigenous artists. As we saw above, the music export ecosystem is characterized by many different players, exploiting different revenue streams through a variety of export activities. There are partnerships to be built between companies and individuals on the music creation side (singers, songwriters, and producers), the customer-facing side (streaming platforms, venues and public performance platforms like radio) and the business side, connecting the two (labels, managers, publicists,

Performance Rights Organizations, distributors, booking agents and more).³¹

Currently, Indigenous artists and music entrepreneurs have little access to the infrastructure of the Canadian music industry, and limited opportunities for development of their talents, skills, and capacity. As we saw above, Indigenous artists require access to trusted managers, labels and publishers to help them advance their careers in ways that felt culturally safe. However, the research undertaken in the development of the present strategy shows that the challenges faced by Indigenous music artists and entrepreneurs first identified by the 2019 *National Indigenous Music Impact Study* led by the Aboriginal Peoples Television Network (APTN) are ongoing.³²

³¹ Dmitry Pastukhov, "How Does the Music Industry Work? Introducing the Mechanics: A 10-Part Series," *Soundcharts*, January 7, 2019, retrieved from <https://soundcharts.com/blog/mechanics-of-the-music-industry>.

³² *National Indigenous Music Impact Study*, APTN with NVision Insight Group Inc., 2019.



Many artists and their representatives consulted for the present strategy point to a need for more professional development opportunities to develop artists and managers' business skills and deepen understanding of international markets. This will allow them to better leverage the opportunities afforded by international markets.

The *National Indigenous Music Impact Study* found that, "Many Indigenous artists would be interested in working with managers, agents and promoters but do not know where to find them, or how to structure and manage professional relationships of that nature. There is a need for approaches and resources to facilitate broader, useful connections between Indigenous musicians and the music industry."³³

Indigenous music artists and entrepreneurs "have even less opportunity to gather, converse, and participate in developing a music industry led by and for Indigenous people."³⁴ "After years of systemic racism, injustice and discrimination, Indigenous musicians and music organizations need strategic investment."³⁵

Best practices in exporting show that artists need access to a robust and solid infrastructure allowing them to invest in creation, access opportunities to perform their music live and to undertake promotion of recorded music. Success begins at home with participation in showcases and touring and savvy promotion and marketing.

³³ *National Indigenous Music Impact Study*, APTN with NVision Insight Group Inc., 2019.

³⁴ Indigenous Performing Artist Alliance and Indigenous Music Alliance, *International Business Development Strategy 2021 – 2024*, March 2021.

³⁵ *National Indigenous Music Impact Study*, APTN with NVision Insight Group Inc., 2019.

2.1.1 Dedicated Streams of Funding

.....

To strengthen the Indigenous music ecosystem and build export capacity in the sector, it is imperative that financing support be established as a principle and that barriers to success are removed so Indigenous applicants have the ability to compete. The Indigenous music ecosystem requires long-term and continuous investment to thrive³⁶ Funding is needed to develop the domestic infrastructure, in particular for Indigenous-led and -owned organizations, including artist management companies, labels, publishers, international events and organizations representing the interests of Indigenous music.

.....

The 2019 *National Indigenous Music Impact Study* found that, “Indigenous musicians are making a significant contribution to Canada but there remain a number of ongoing, systemic issues that are keeping Indigenous musicians from fully participating in the Canadian economy.”³⁷ Indigenous artists and Indigenous-owned music businesses struggle to compete on a level playing field, due to historic and systemic lack of access to funding. One of the recommendations of the *National Indigenous Music Impact Study* was the creation of an Indigenous-led National Indigenous Music Office to advance Indigenous cultural/music sovereignty, making way for more Indigenous-owned, operated and directed companies. However, following several years of work involving extensive community consultations and laying the foundations for a new organization, the newly created National Indigenous Music Office faces an uncertain future due to limited access to funding.

With a few notable exceptions, most funds currently available to the music industry in Canada lack any strategic focus on assisting the development and export of Indigenous music. There are few dedicated resources (funding programs) specifically aimed at supporting the development and growth of an Indigenous music industry ecosystem. The sustainability of critical Indigenous industry organizations is threatened by systemic barriers to funding, which are also faced by Indigenous music

³⁶ Marcia Nickerson, “Building the Indigenous Music Industry and Developing an Indigenous Music Office, Prepared for the Indigenous Music Alliance, June 30 2021.

³⁷ *National Indigenous Music Impact Study*, APTN with NVision Insight Group Inc., 2019.

Interviewees for this report noted the systemic lack of access to funding and other opportunities and the challenges this lack of access creates for Indigenous artists and organizations.

artists and entrepreneurs. Interviewees for this report noted the systemic lack of access to funding and other opportunities and the challenges this lack of access creates for Indigenous artists and organizations. Barriers to access to funding programs by marginalized groups, including Indigenous artists and organizations, have also been widely documented.³⁸

We note that some national funders, such as Creative Export Canada, the Canada Council for the Arts, the Canada Media Fund and Telefilm Canada, have dedicated programs to foster the growth, development and export of Indigenous creative sectors and artists. An area of further study could be to better understand current demand and available funding to support music exports by Indigenous clients. It is unclear what proportion of resources allocated to supporting music in Canada are actually used to support Indigenous companies, organizations and creators.

Funds intended to support the Canadian music sector should reflect the aspirations of Indigenous music professionals and companies to grow and compete at home and abroad, and should be available at amounts that redress historic inequity and lack of access to support, to create a more level playing field for Indigenous artists and organizations. Multiple studies have shown that incremental funding (i.e., small amounts

³⁸ See for example, *National Indigenous Music Impact Study*, APTN with NVision Insight Group Inc., 2019; *Arts and Heritage Access and Availability Survey 2020-2021*, prepared by Environics Research Group for the Department of Canadian Heritage and Canada Council for the Arts, April 28, 2021; Evaluation Services Directorate, Canadian Heritage, *Grouped Arts Evaluation: Canada Arts Presentation Fund, Canada Cultural Spaces Fund, and Canada Cultural Investment Fund, 2013-14 to 2017-18*, August 20, 2019; Evaluation Services Directorate, Canadian Heritage, *Evaluation of the Canada Arts Training Fund 2012-13 to 2017-18*, February 20, 2019; *National Culture Summit: The Future of Arts, Culture and Heritage in Canada – May 2, 3, and 4, 2022 – Final Report*, Catalogue No. CH4-198/2022E-PDF, ISBN 978-0-660-44503-8; Canadian Heritage, *Summary of Notes: Anti-Racism and Equity Roundtable*, September, 2020; Canada Council for the Arts, *Reimagine the Arts 2021-2026 Strategic Plan, What We Heard Report*, Prepared by Hill + Knowlton Strategies, 2020; British Columbia Arts Council, *New Foundations: Strategic Plan for the British Columbia Arts Council 2018-2022*, 2018; Conseil des arts de Montréal, *Racisme et discrimination systémiques dans les arts Analyse et réflexions sur le parcours du Conseil des arts de Montréal*, prepared by Diane Boustany, October 2019; and Calgary Arts Development, *APS: Summaries Discrimination*, 2020.

of funding that are often more symbolic than strategic) is a poor investment strategy: insufficient to sustain organizations and contributing to leader burnout.³⁹

With the *Online Streaming Act*'s stated priority for supporting and promoting Indigenous content (stories and music), there is an opportunity for the federal government to take the lead in ensuring dedicated resources for Indigenous music. It is anticipated that the Act will generate new investment requirements for Indigenous music by all players. This new injection of resources could substantially support the promotion of Indigenous music to Canadian and foreign audiences and would be complementary to artists' own efforts to build their online presence and fanbase.

In addition, the Canadian Radio-television and Telecommunications Commission (CRTC) has indicated that it "intends to gather information on different funds and initiatives that help support, promote and ensure the sustainability of the Indigenous broadcasting content

sector" through the launch of a follow-up proceeding on the commercial radio policy to explore the Canadian Content Development contribution system.⁴⁰ This provides yet another avenue to advocate for increased support for the Indigenous music sector. An appropriate body to administer funds directed to the Indigenous music sector would be an Indigenous-owned or -directed organization.

Stakeholders consulted for this report pointed to two programs as exemplary in their support for Indigenous music, including exporting activities. These are the Indigenous Music Program created by Manitoba Music, which offers export readiness training to artists and their teams, and the Canada Council for the Art's Indigenous-led Creating, Knowing and Sharing Program,⁴¹ which provides support for travel and international touring, as well as for creation and production, to Indigenous artists and organizations. The Canada Council set a goal to triple its funding to Indigenous artists, groups and organizations to \$18.9 million annually (in all artistic disciplines), an amount

³⁹ See for example, National Assembly of State Arts Agencies, *Equity Choice Points: A grantmaking reflection tool for state arts agencies*, September 2020; Greater Pittsburgh Arts Council, *Racial Equity in Arts Funding in Greater Pittsburgh*, prepared in partnership with The Learning and Leadership Committee, Summary Report, 2018.

⁴⁰ CRTC, *Broadcasting Regulatory Policy CRTC 2022-332*, retrieved from <https://crtc.gc.ca/eng/archive/2022/2022-332.htm>.

⁴¹ Canada Council for the Arts, *Creating Knowing and Sharing: The Arts and Cultures of First Nations, Inuit and Métis Peoples*, program description, retrieved from <https://canadacouncil.ca/funding/grants/creating-knowing-sharing/indigenous-organizations>.

it surpassed thanks to the injection of emergency pandemic funding.⁴² Of this amount, about \$1 million per year was distributed to Indigenous music projects between 2017 and 2022, supporting an average of 20 projects per year.⁴³

Australia, which provides broad support for Indigenous art and culture, and targeted support for Indigenous music, provides additional lessons for Canada. Australia's most recent cultural policy⁴⁴ established recognition and support for the art and culture of First Nations as its first principle. Central to the government's national cultural policy reform will be to establish Creative Australia, which will include a First Nations-led Board.

In 2020 the Australian Government launched the Indigenous Contemporary Music Program.⁴⁵ As noted on the program's website, the program "supports self-determination by funding First Nations-led organizations to provide professional industry-based opportunities for Aboriginal and Torres Strait Islander musicians and

bands." Organizations that are fully or partially owned, governed, staffed or advised by Aboriginal and/or Torres Strait Islander people are eligible to this program, which has an allocation of AUD \$1.5 million (CAD \$1.3 million) over three years.

The range of activities supported is broad and representative of all aspects of the music business. Funding is available to support training, mentoring, and paid internships in all aspects of the music business. It supports live performance and touring opportunities, as well as professional activities such as securing management, producing demos and sound recording. The program extends to the creation of culturally safe performance and production environments. It supports individuals to participate in workshops and mentorships, attend professional conferences and events, and to establish their relationships with media and streaming services.

⁴² Canada Council for the Arts, *Canada Council Funding Overview – Stats and Stories 2021-221*, corporate website: <https://canadacouncil.ca/research/stats-and-stories>.

⁴³ Interviews

⁴⁴ Australian Government, *Revive: Australia's Cultural Policy for the next five years, 2023*.

⁴⁵ Australian Government, Department of Infrastructure, Transport, Regional Development, Communications and the Arts, Office for the Arts, *Indigenous Contemporary Music*, Program description, Corporate website: <https://www.arts.gov.au/funding-and-support/indigenous-contemporary-music>.

2.2 Strengthen Export Readiness of Indigenous Artists

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The development of a far-reaching, national program is needed to encourage and support the professional development of Indigenous artists and professionals in all positions that support export activities, including support for artists and their managers to develop their business knowledge and skills, export bootcamps to help artists and their managers develop their export market plans. Export readiness workshops targeting Indigenous music professionals are currently being provided by some organizations, notably Manitoba Music. More such initiatives are needed across the country to help Indigenous artists and managers to develop the tools needed to succeed in the international market. There is also a need for funding to support artists to become export ready.

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As this study has demonstrated through the profiles of Indigenous artists, there are many pathways to the international market. As noted above, export readiness is mostly aspirational for the majority of Indigenous music artists. To be export ready, artists must gain local and national experience. This means having opportunities to create, produce and present Indigenous music in Canada. Some examples of programs that support Indigenous artists to develop within Canada were identified by stakeholders consulted for this study.

The Indigenous Music Initiative, launched by the First Peoples' Cultural Council (FPCC) in partnership with Creative BC, supports Indigenous music artists and professionals with skills development and touring opportunities in Canada. The FPCC also supports skills development across a range of technical positions in the music industry, strengthening the overall development of an Indigenous music industry on the national level, the Canada Council for the Arts supports Indigenous music artists to produce their music and tour in Canada. In Quebec, Indigenous-led inPath provides emerging artist development opportunities

to Indigenous youth and young adults. These programs provide examples of best practice: they are Indigenous-led and provide targeted programs to support Indigenous music artists. They also provide a valuable foundation on which to build export readiness and exports.

In addition to experience with playing to live audiences, recognition and success in domestic markets helps artists break through with international audiences. In addition to major prizes and awards, it was pointed out by stakeholders that promoters and presenters are increasingly focused on data analytics and that artists should be working to enhance their digital followings.

Representation is considered important by potential buyers and having a manager is said to be more significant than representation by a label (i.e. that is not providing management services) or an agent. As we have seen in this study, artists that are being supported by managers, labels or publishers were more likely to report being successful in undertaking export activities.

Best practices also show that representation, significant

infrastructure and planning is required for artists to undertake export activities.⁴⁶ Knowledge of targeted territories, marketing plans and publicists are considered essential for successful touring abroad. A past study had found that: "Many Indigenous artists would be interested in working with managers, agents and promoters but do not know where to find them, or how to structure and manage professional relationships of that nature. There is a need for approaches and resources to facilitate broader, useful connections between Indigenous musicians and the music industry."⁴⁷

Accessing international audiences requires an entrepreneurial mindset which can fall within the domain of the artist, their management and supporting team. This involves a series of relationships based on partnerships, deals or co-creation activities. The international music industry is both highly competitive and highly collaborative, built on networks of micro companies. An important focus is maintaining a high degree of communication and trust. In a continually changing music industry driven by new technologies, new formats

⁴⁶ Steven Chen et al., *The Music Export Business: Born Global*, Routledge, 2021.

⁴⁷ *National Indigenous Music Impact Study*, APTN with NVision Insight Group Inc., 2019.

for music promotion, fluid audience demographics and multiple industry actors, the music entrepreneur must be adept at managing these.

To establish an international presence a team will be responsible for the following: touring, defining a niche, digital marketing, social media tools, product identity, international networking at industry events, employing international booking agents and publicists, and follow-up travel for meetings. A study of music exporting in Australia found that the most knowledgeable respondents use the following export tools more often than less experienced exporters: digital analytics, tastemakers, trade and showcase events, playlists, streaming, and publicists.⁴⁸ The team usually includes management, legal and accounting expertise, label, publisher, publicist, merchandising partners, international booking agent, tour manager, and other international partners such as promoters, venues, showcasing events, etc.

2.3 Prioritize International Showcasing, Touring and Networking

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Export strategies that are developed by Indigenous artists and their representatives should include international touring and showcases. The showcase model remains the predominant engine for export activity, as a global circuit of national/industrial hubs for business, touring, media, promotional and related activity. The festivals and markets consulted for this study indicate that there is interest in showcasing Indigenous artists at their festivals.

.....

Financing, travel costs, time, and follow-up costs were found to be significant barriers in realizing successful export strategies in a national industry survey undertaken in Australia.⁴⁹ As is the case in other jurisdictions, this study found that artists and their managers make the largest investments in international touring.⁵⁰

⁴⁸ Professor Richard Vella, University of Newcastle, et al., 2019, Op. Cit.

⁴⁹ Professor Richard Vella, University of Newcastle, et al., 2019, Op. Cit.

⁵⁰ Professor Richard Vella, University of Newcastle, et al., 2019, Op. Cit.

2.3.1 Adapt Travel and Touring Support to Needs of Indigenous Artists

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Targeted support is needed to support international touring by export-ready Indigenous music artists. Every effort should be made to provide sufficient funding to remove risk from artists. Funders should consider covering more of the costs incurred by Indigenous music artists for export-related activities, up to 100% of all associated showcasing costs including travel.

.....

This study found that the long turn-around time on travel grant applications in most programs add a burden of risk to artists whose financial context may already be fragile. Travel assistance programs need to be designed with the input of Indigenous people, to better reflect their needs. Stakeholders pointed to specific needs of Indigenous artists that can act as barriers to touring, such as travelling with small children and other family members, the need for access to health care when abroad, or limited access to credit (i.e., credit cards), that can make financing a tour more challenging.

2.3.2 Nurture International Networking and Relationship-building

.....

With appropriate support, an Indigenous-owned or -directed organization could be tasked with the development of an Export Office aimed at providing market intelligence on key territories to target and penetrate, and relationship building with international networks.

.....

It is important to have a local partner in place when showcasing at an international market event. Developing international networks and attending international market events assist music industry professionals in developing key networks and are the most important factor in developing a successful export strategy.⁵¹ Developing international networks and attending

⁵¹ Professor Richard Vella, University of Newcastle, et al., 2019, Op. Cit.

international market events assist music industry professionals in developing key networks and are the most important factor in developing a successful export strategy.

The most successful export strategies remain embedded in personal and industrial networks that require large amounts of time and repeated market reconnaissance to succeed. Barriers to funding repeat trips to markets should be removed. Artists and teams often need to return to the same market several times before yielding results.

Successful music exporters still require support and assistance to realize their export strategies including on the ground support, financing, introductions, access to networks and showcase events. Export offices are being used in countries around the world and are considered effective in helping to coordinate export activities.⁵²

2.3.3 Target Markets – Strategic Support for Indigenous Organizations

.....

Dedicated resources for Indigenous-owned or -directed organizations will provide strategic investment in the development of the sector and increase its export capacity. As seen above, Indigenous artists surveyed for this report are already undertaking a variety of export activities in the United States, United Kingdom, France, Germany, Australia and New Zealand.

.....

The sustainability of Indigenous music organizations is threatened by a lack of funding. As a result, key infrastructure organizations are limited in their capacity, undermining their ambitions. With additional and sustained support, Indigenous-owned and -directed organizations could be involved in leading or co-leading export missions to target markets with other industry partners.

2.4. Promote Discoverability on Streaming and Broadcasting Platforms

The recent adoption of the Online Streaming Act in Canada presents an unprecedented opportunity to promote Indigenous music to Canadians and the world. It is anticipated that the implementation of the Act will ensure the discoverability of Indigenous music aired by Canadian radio broadcasters and streamed online by dedicated services. Other opportunities are afforded by upcoming regulatory reviews by the CRTC.

For recorded music, disseminating an artist's music through streaming services, social media and other platforms such as YouTube and Instagram have been identified as best practice for successfully undertaking export activities. Our case studies demonstrate the importance of having an international market release strategy to maximize the promotional opportunities afforded by digital streaming services.

The CRTC has noted the issue of representation of Indigenous music content on Canadian radio is being examined in the ongoing consultations on the new *Online*

*Streaming Act*⁵³. The Commission is also co-developing a new Indigenous Broadcasting Policy, in partnership with First Nations, Métis, and Inuit broadcasters, content creators, and audiences.⁵⁴

In its revised Commercial Radio Policy, the CRTC has laid out an expectation that commercial radio broadcasters include Indigenous music in their playlists, without setting quotas.⁵⁵ Indigenous leaders recently called on the CRTC to impose a minimum commercial radio airplay quota of 5% for Indigenous music content.⁵⁶ The recommendation was made in a report, *Mémoire sur le contenu*

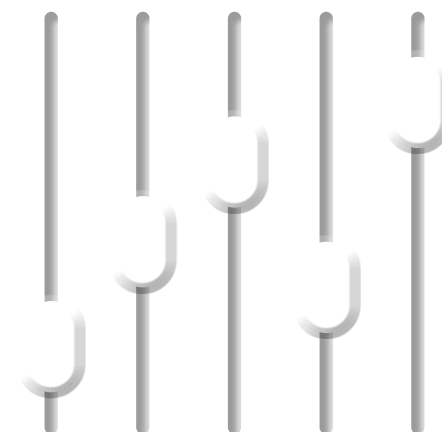
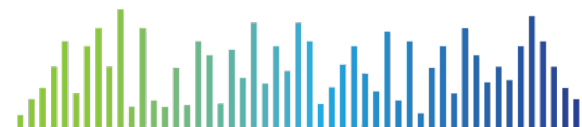
⁵³ Connie Thiessen, "Indigenous leaders call for minimum commercial radio airplay quota," in Broadcast Dialogue, March 28, 2023

⁵⁴ CRTC, *Co-Development of the Indigenous Broadcasting Policy*, Corporate website: <https://crtc.gc.ca/eng/comm/ppi/index.htm>.

⁵⁵ CRTC, *Broadcasting Regulatory Policy CRTC 2022-332*, retrieved from <https://crtc.gc.ca/eng/archive/2022/2022-332.htm>.

⁵⁶ Connie Thiessen, "Indigenous leaders call for minimum commercial radio airplay quota," in Broadcast Dialogue, March 28, 2023

musical autochtone (Memorandum on Indigenous Musical Content) undertaken by Indigenous record label Makusham Musique, in collaboration with Innu Takuaikan, the Innu First Nations band government in Quebec. According to the report, 95% of respondents surveyed agreed a percentage of Indigenous music content should be imposed on commercial radio stations in Quebec and Canada, expressing that they almost never hear Indigenous music on the radio. As was noted by Mathew Mackenzie, co-owner of Makusham Musique in a prepared statement, “Although the Indigenous music industry is booming in Canada, the presence of our artists in commercial radio remains an occasional occurrence.”⁵⁷



⁵⁷ Connie Thiessen, “Indigenous leaders call for minimum commercial radio airplay quota,” in *Broadcast Dialogue*, March 28, 2023

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Annex II: List of Interviewees

Fabiana Batistela, Executive Director, SIM Sao Paulo

Laurie Begin, Artist Manager, OPAK Media

Trisha Carter, Senior Director, Business Affairs, Canadian Independent Music Association

Cris Derksen, Music Artist

Leela Gilday, Music Artist, Diva Sound Records

Noel Habel, Creation, Knowing and Sharing Program, Canada Council for the Arts

David Hodges, Director of Music Programming – Outreach and Partnerships, inPath

Nigel Irwin, Co-Creative Director/Composer, Nagamo Music

Jean Larose, President/CEO, Dadan Sivunivut

Cynthia Lickers-Sage, Executive Director, Indigenous Performing Arts Alliance

Lindsay MacPherson, Executive Director, Music BC

Matt Maw, Director & Lead Artists and Manager, Red Music Rising

Sean McManus, Executive Director, Manitoba Music

Andrew Morrison, Co-Founder Aakuluk Music

Sergio Arbelaez Ospina, Director, FIMPRO, Guadalajara

Shaneen Robinson-Desjarlais, Coordinator, Manitoba Music

Nicole Auger, Manager of Programming and Community Engagement, Indigenous Music Alliance

Kev Starkey, Darkwood Studio Record Label Service, Elder in Residence, Big Sound

Kris Stewart, Chief Executive Officer, QMusic (Big Sound)

Tanya Tagaq, Music Artist

Steve Wood, Music Artist, Northern Cree

Annex III: Summary of Survey Findings

1. SURVEY OF INDIGENOUS MUSIC ARTISTS

1.1 Characteristics of respondents

The artists surveyed for this report represent a broad range of musical genres, with two thirds identifying their music as folk or roots music, while half identify their music as “indie”. One artist identified their music as being in the genre of “Indigenous soul.”

Table 1: Musical genres of artists surveyed

Answer choices	Responses	
	Percentage	Number
Folk/Roots	65%	11
Indie	47%	8
Rock	41%	7
Contemporary	29%	5
Pop	29%	5
Alternative	24%	4
Indigenous Language	24%	4
Blues	18%	3
Country	18%	3
Country/Rock	18%	3
Traditional - cultural (i.e. throat singing, pow wow singer, drum groups, flute playing)	18%	3
Classical/Opera	12%	2
Dance/Electronic Music	12%	2
Hip Hop/Rap/Trap	12%	2
Instrumental	12%	2
R&B/Soul	12%	2

Answer choices	Responses	
Metal/Heavy Metal	6%	1
World/Global	6%	1
Other (please specify)	6%	1

N=17

For the most part, artists who participated in the survey are based in Ontario, Manitoba and Quebec. British Columbia, Northwest Territories, Yukon, Alberta and Newfoundland and Labrador were also represented.

Table 2: Province or territory in which respondent are based

Answer choices	Responses	
Answer choice	Percentage	Number
Alberta	7%	1
British Columbia	7%	1
Manitoba	29%	4
New Brunswick	0%	0
Newfoundland and Labrador	7%	1
Nova Scotia	0%	0
Ontario	36%	5
Prince Edward Island	0%	0
Quebec	29%	4
Saskatchewan	0%	0
Northwest Territories	7%	1
Nunavut	0%	0
Yukon	7%	1

N=16

1.2 Access to representation

Amongst music artists surveyed, two thirds (65%) have access to a booking agent and/or tour manager in Canada, as compared to 47% who have access to an international agent or tour manager. Just over 41% have access to artist management. Only 18% of artists have a publisher other than themselves for their music. A small number of respondents (12%) did not have access to any form of representation.

Table 3: Access to representation by someone other than the artist or a company owned by the artist

Answer choices	Responses	
	Percentage	Number
Agent/tour manager (Canada)	65%	11
Publicist (Canada)	53%	9
Agent/tour manager (international territories)	47%	8
Artist manager	41%	7
Label	41%	7
Publicist (international territories)	29%	5
Publisher	18%	3
None of the above	12%	2

N=17

Two thirds of artists surveyed also fill the role of manager. Half are booking and/or managing their own tours. About half (47%) are self-releasing and self-publishing their music. Other roles included album producer.

Table 4: Roles filled by the artist or by a company owned by the artist

Answer choices	Responses	
	Percentage	Number
Artist manager	65%	11
Agent/tour manager	47%	8
Record label/publisher	47%	8
Publicist	29%	5
None of the above	12%	2
Other (please specify)	12%	2

N=17

1.3 Profile of exporting activities

The vast majority of respondents are engaged in some exporting activities. The most frequent types of activities indicated by 81% of respondents are international music streaming and performing at international showcases. These activities are closely followed by international sales and distribution of recorded music, performing at international festivals and receiving international press and media coverage (75% of respondents). Over two thirds of respondents (69%) have attended an international music market or conference and conducted exported related business meetings.

Table 5: Export activities engaged in since 2010

Answer choices	Responses	
	Percentage	Number
International streaming of your music (free or paid)	81%	13
Performance at international showcase	81%	13
International sales and distribution of your recorded music (physical or digital)	75%	12
Performance at international festival	75%	12
Received international press/media coverage	75%	12
Attendance at international music market or conference	69%	11
Conducted business meetings	69%	11
Recording/licensing deal	63%	10
International tour as featured artist or supporting (opening) act	56%	9
Engaged international publicist	56%	9
Appeared on international TV or radio	56%	9
Engaged international booking agent	44%	7
Participation in a government Trade Mission	38%	6
Publishing deal	19%	3
None of the above, I have not actively exported my music since 2010.	6%	1

N=16

The US, the UK, Germany, Australia and France are the foreign markets in which artists have had the greatest success. Over two-thirds of artists indicated that they had had the greatest success in exporting their music in the US. Over half, 57%, have had the greatest success in the UK, while half of all respondents have had the greatest success in Australia.

Table 6: Territories in which artists have had the greatest success exporting their music

Answer choices	Responses	
	Percentage	Number
United States (US)	71%	10
United Kingdom (UK)	57%	8
Germany	50%	7
Australia	36%	5
France	29%	4
Europe	29%	4
New Zealand	21%	3
Mexico	14%	2

N=14

Few artists have developed international networks. Thirty-eight percent have established networks in some territories.

Table 7 : Artists' international networks

Answer Choices	Responses	
	Percentage	Number
I have established networks in some territories	38%	6
I am developing networks in some territories	25%	4
I am developing networks globally (i.e., many or most territories)	13%	2
I have a few contacts that I hope to develop	13%	2
None of the above	6%	1
I have an established international network in the music industry	6%	1

N=16

1.4 Access to Funding to Support Export Activities

Three-quarters of artists surveyed have self-funded their export activities.

Table 8: How artists financed their export activities

Answer Choices	Responses	
	Percentage	Number
Grant(s) or other funding support from a public funder or industry organization	88%	14
Self-funded the activity(s)	75%	12
Other (please specify)	13%	2
None of the above	6%	1

N=16

The majority of artists have accessed a travel grant (79% of respondents) and/or a touring grant (71%). Just over half (57%) accessed funding to participate in a showcase.

Table 9: Types of support accessed for export activities

Answer Choices	Responses	
	Percentage	Number
Travel Grant	79%	11
Funded Touring Grant	71%	10
Project Grant	64%	9
Funding to participate in a showcase	57%	8
Funding to hire a publicist	21%	3
Funding to hire an agent	7%	1

N=14

The vast majority of funding is being provided by federal and provincial governments and/or agencies (93%, respectively).

Table 10: Funding sources that were accessed to support export activities

Answer Choices	Responses	
	Percentage	Number
Federal government/agency	93%	13
Provincial government/agency	93%	13
Industry	29%	4
Municipal government or Band Council	14%	2

N=14

The funding that is being accessed is extremely important (79% of respondents) or very important (14%) to ensuring successful exporting. Touring grants, project grants and development funding from the Canada Council for the Arts were amongst the most impactful funding received by respondents.

Table 11: Importance of funding support to artists in successfully exporting their music

Answer Choices	Responses	
	Percentage	Number
Extremely important	79%	11
Very important	14%	2
Neutral	7%	1

N=14

Amongst artist respondents, almost all indicated that grants to hire an international agent, publicist or tour manager would help Indigenous music artists to successfully export their music. The vast majority (88%) also selected quick-reply grants with minimum turn-around times and international touring grants. Over 80% of respondents are of the view that funding to organization Indigenous music showcases, international travel grants and Canadian travel grants would help them to successfully export their music. One respondent suggested providing access to a Native entertainment lawyer.

Table 12: Type of support that would help Indigenous music artists to successfully export their music

Answer Choices	Responses	
	Percentage	Number
Grants to hire an international agent, publicist or tour manager	94%	15
Quick-reply grants with minimum turn-around-times	88%	14
International touring grants	88%	14
Funding to organize Indigenous music showcases in Canada and abroad	81%	13
International travel grants	81%	13
Travel grants within Canada	81%	13
Canadian touring grants	81%	13
Funding for the International Indigenous Music Summit	75%	12
Funding for other Indigenous music support organizations	75%	12
Music production grants	75%	12
International marketing and promotion grants	69%	11
Professional development opportunities	69%	11
Canadian marketing and promotion grants	63%	10
Grants to hire a Canadian agent, publicist or tour manager	63%	10
Professional development grants	63%	10
Opportunities to join government trade missions	56%	9
Business support (visas, taxes, etc)	50%	8
Other (please explain)	6%	1

1.5 Future Export Priorities

Over 80% of artists anticipate that international streaming will be part of their exporting over the coming year. Three quarters plan to perform at an international festival or showcase.

Table 13: Export activities planned for the next twelve months

Answer Choices	Responses	
	Percentage	Number
International streaming of your music (free or paid)	81%	13
Performing at an international festival	75%	12
Performing at an international showcase	75%	12
Seeking international press/media coverage	69%	11
International sale and distribution of recorded music (physical or digital)	63%	10
Touring internationally as featured artist or opening act	63%	10
Engaging an international publicist	56%	9
Appearing on international TV or radio	50%	8
Conducting business meetings	50%	8
Engaging an international booking agent	38%	6
Publishing deal	25%	4
Recording/licensing deal	19%	3
Participating in a government Trade Mission	13%	2
None of the above, I have no export activities planned for the next year	6%	1

N=16

Amongst the territories with the greatest potential for Indigenous music exports, artists identified Germany (94% of respondents, followed by the US (81%), and Europe and Australia (75%, respectively). About two-thirds of respondents identified the UK (69%) or France (63%) as having the great export potential. Greenland was proposed as an other territory.

Table 14: Territories perceived by artists to have the greatest potential for exporting their music

Answer Choices	Responses	
	Percentage	Number
Germany	94%	15
United States (US)	81%	13
Europe	75%	12
Australia	75%	12
United Kingdom (UK)	69%	11
France	63%	10
New Zealand	50%	8
Norway	25%	4
Mexico	25%	4
Latin America	19%	3
Asia (China, India, Indonesia, etc)	19%	3
Brazil	13%	2
Chile	13%	2
Colombia	13%	2
Other territory (please specify)	13%	2
Africa (Ghana, South Africa, Uganda, etc)	6%	1

N=16

2. SURVEY OF INDIGENOUS MUSIC ARTISTS' REPRESENTATIVES: LABELS/PUBLISHERS, ARTIST MANAGERS AND BOOKING AGENTS/TOUR MANAGERS

2.1 Characteristics of Respondents

All of the respondents who participated in the survey represent Indigenous music artists. About 40% of respondents identified as a label and/or publisher. A third are artist managers and 28% are booking agents and/or tour managers.

Table 15: Primary occupation in the music industry (i.e., most of the time)

Answer Choices	Responses	
	Percentage	Number
Label/publisher	39%	7
Artist manager	33%	6
Agent/tour manager	28%	5

N=18

Respondents represent artists in a wide array of genres. Two thirds represent artists in the folk or roots music genre. Amongst the other category, artists indicated their music to be avant garde, experimental vocal and Americana.

Table 16: Musical genres of Indigenous music artists represented

Answer Choices	Responses	
	Percentage	Number
Folk/Roots	65%	11
Alternative	29%	5
Blues	29%	5
Country	29%	5
Indie	29%	5
Indigenous Language	29%	5
Rock	24%	4
Contemporary	18%	3
Hip Hop/Rap/Trap	18%	3
Instrumental	12%	2
Jazz	12%	2
Pop	12%	2
R&B/Soul	12%	2
Traditional - cultural (i.e., throat singing, pow wow singer, drum groups, flute playing)	12%	2
World/Global	12%	2
Country/Rock	6%	1
Other (please specify)	24%	4

N=17

Overall, 50% of respondents to this survey are based in Ontario. In all, 17% of respondents were based in Quebec and another 17% were based internationally. A few respondents are based in British Columbia, Alberta, and Manitoba.

Table 17: Province or territory in which artists' representatives are based

Answer Choices	Responses	
	Percentage	Number
Alberta	6%	1
British Columbia	6%	1
Manitoba	6%	1
New Brunswick	0%	0
Newfoundland and Labrador	0%	0
Nova Scotia	0%	0
Ontario	50%	9
Prince Edward Island	0%	0
Quebec	17%	3
Saskatchewan	0%	0
Northwest Territories	0%	0
Nunavut	0%	0
Yukon	0%	0
International	17%	3

N=11

2.2 Profile of exporting activities

Respondents are involved in a wide range of export activities on behalf of Indigenous music artists. The most commonly reported activity was conducting business meetings (80%) of respondent. Two thirds (67%) of respondents also indicated being involved in the following export activities: international streaming of music, performances at international showcases and artist management.

Table 18: Export activities engaged in since 2010 on behalf of Indigenous music artists

Answer Choices	Responses	
	Percentage	Number
Conducted business meetings	80%	12
International streaming (free or paid)	67%	10
Performance at International showcase	67%	10
Artist management/co-management	67%	10
Engaged international booking agent	60%	9
Performance at International festival	53%	8
Attendance at International music market or conference	53%	8
International tour (featured or opening act)	53%	8
International sale and distribution of recorded music (physical or digital)	47%	7
Engaged international publicist	40%	6
International press/media coverage	40%	6
Recording/licensing deal	33%	5
International TV and Radio promotion/appearances	33%	5
International TV/Film synchronisation placement	27%	4
Participation in a government Trade Mission	20%	3
Publishing deal	20%	3
Brand partnership/Sponsorship/Product endorsement	20%	3
Engaged international record producer	13%	2
Other (please specify)	7%	1

N=15

Amongst the territories where respondents have had the greatest success, almost all (92%) indicated the US. About half (54%) also indicated the UK.

Table 19: Territories in which representatives had the greatest success exporting Indigenous music

Answer Choices	Responses	
	Percentage	Number
United States (US)	92%	12
United Kingdom (UK)	54%	7
Australia	31%	4
France	23%	3
Germany	23%	3
Europe	15%	2
New Zealand	8%	1

N=13

Artist representatives tend to have established networks for working internationally. Over half (58%) have established international networks in the music industry, while 17% have networks in some territories.

Table 20: International Networks

Answer Choices	Responses	
	Percentage	Number
I have an established international network in the music industry	58%	7
I have established networks in some territories	17%	2
I am developing networks globally (i.e., in many or most territories)	17%	2
I am developing networks in some territories	8%	1

N=12

2.3 Access to Funding to Support Export Activities

Almost all (93%) of representatives have accessed funding for exporting Indigenous music. In addition, two-thirds (67%) have self-funded their activities. Amongst other sources of funding, one respondent indicated support from First Nation, another indicated contracted fees and commissions. A third respondent explained that the artist received marketing and creative grants, while they receive travel grants.

Table 21: How artists' representatives financed their Indigenous music export activities

Answer Choices	Responses	
	Percentage	Number
Grant(s) or other funding support from a public funder or industry organization	93%	14
Self-funded the activity(s)	67%	10
Other (please explain)	20%	3

N=15

The most common types of support accessed were travel grants (80%), followed by project grants (70%) and touring grants (60%). Half (50%) of respondents accessed funding for artists to participate in a showcase.

Table 22: Types of support accessed for export activities related to Indigenous music artists

Answer Choices	Responses	
	Percentage	Number
Travel grant	80%	8
Project grant	70%	7
Touring grant	60%	6
Funding to participate in a showcase	50%	5
Funding to hire a publicist	40%	3
Funding to hire an agent	30%	4

N=10

All of the respondents accessed funding from the federal government or a federal agency. About half (55%) have access to provincial funding.

Table 23 : Funding sources that were accessed to support export activities

Answer Choices	Responses	
	Percentage	Number
Federal government/agency	100%	11
Provincial government/agency	55%	6
Industry	27%	3
Municipal or Band Council	9%	1

N=11

Accessing funding was extremely important (73% of respondents) or very important (27%) to the success of exporting Indigenous music. The type of support that had the greatest impact on the international career development of the Indigenous artists represented by respondents included access to funding from the Canada Council for the Arts and the StarMaker Fund. Travel, touring and project funding are most impactful.

Table 24: Importance of funding support in successfully exporting Indigenous music

Answer Choices	Responses	
	Percentage	Number
Extremely important	73%	
Very important	27%	

N=11

All respondents indicated that international touring grants would help Indigenous music artists to successfully export their music. Quick-reply grant, international travel grants and funding for international marketing and promotion were indicated by the vast majority (91%) of respondents. This was followed by grants to hire an international agent, publicist or tour manager (82% of respondents). Business support, for example, to assist with work visas was mentioned by three-quarters of respondents.

Table 25: Type of support that would help Indigenous music artists to successfully export their music

Answer Choices	Responses	
	Percentage	Number
International touring grants	100%	11
Quick reply grants with minimum turn-around-times	91%	10
International travel grants	91%	10
International marketing and promotion grants	91%	10
Grants to hire an international agent, publicist or tour manager	82%	9
Business support for international work (visa issues, taxes, etc.)	73%	8
Funding to organize Indigenous music showcases at international market events	64%	7
Music production grants	64%	7
Funding for the International Indigenous Music Summit	55%	6
Travel grants within Canada	55%	6
Canadian touring grants	55%	6
Canadian marketing and promotion grants	55%	6
Professional development opportunities	55%	6
Opportunities to join government Trade Missions	45%	5
Funding for other Indigenous music support organizations	45%	5
Grants to hire a Canadian agent, publicist or tour manager	45%	5
Professional development grants	45%	5

2.4 Future Export Priorities

Amongst the planned export activities over the next year, respondents most often indicated attracting international press or media coverage, international touring and performing at an international festival or showcase. Similarly, engaging an international publicist was high on the list of planned export activities. Other export activities mentioned included international award nominations and showcasing at the International Folk Alliance. No respondent has planned any participation in a government trade mission.

Table 26: Export activities planned for Indigenous music artists over the next twelve months

Answer Choices	Responses	
	Percentage	Number
International press/media coverage	83%	10
International tour (featured or opening act)	75%	9
Performance at International festival	67%	8
Performance at International showcase	67%	8
Engaging an international publicist	67%	8
International sale and distribution of recorded music (physical or digital)	58%	7
International streaming (free or paid)	58%	7
Attendance at International music market or conference	58%	7
Conducting business meetings	58%	7
Engaging an international booking agent	50%	6
International TV and Radio promotion/appearances	42%	5
Recording/licensing deal	33%	4
Artist management/co-management	33%	4
International TV/Film synchronisation placement	33%	4
Brand partnership/Sponsorship/Product endorsement	33%	4
Publishing deal	25%	3
Engaging an international record producer	25%	3
Other (please specify)	17%	2
Participation in a government Trade Mission	0%	0

The US is perceived to have the greatest potential to the highest proportion of respondents (82%), following by the UK (73%) of respondents. France, Europe, Australia and New Zealand were identified as having great export potential by over half of respondents (55%), respectively.

Table 27: Territories perceived to have the greatest potential for exporting Indigenous music

Answer Choices	Responses	
	Percentage	Number
United States (US)	82%	9
United Kingdom (UK)	73%	8
France	55%	6
Europe	55%	6
Australia	55%	6
New Zealand	55%	6
Germany	27%	3
Norway	27%	3
Brazil	9%	1
Latin America	9%	1

N=11

Chi miigwetch to our funding partners

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Any opinions, findings, conclusions, or recommendations expressed in this report are those of the participants and do not necessarily reflect the views of the funders, who are in no way bound by the recommendations within.