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NVision Insight Group Inc.

National Indigenous Music Impact Study

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key findings

"Canada, you are in the midst of an Indigenous renaissance. Are you ready to hear the truths that need to be told? Are you ready to see the things that need to be seen?"

"It seems that a lot of interest has come into Indigenous culture through just connectivity and...showing our music on a national platform and sharing culture like that. This seems to be opening a lot of people's eyes up."

The first quote is what Jeremy Dutcher, Mi'kmaq musician and composer, said when he accepted the 2018 Polaris Prize. The second is Ian Campeau, also known as DJ NDN, the co-founder and former member of A Tribe Called Red, the award-winning group that created a unique and innovative musical style that integrates hip-hop, traditional pow wow drums and vocals with electronic music production styles, speaking to CBC Radio back in 2015 when the Truth and Reconciliation Commission (TRC) issued its report. He credited some of his group's success to a growing interest in, and awareness of, Indigenous history, Indigenous culture, Indigenous realities.

Those two comments epitomize the current milieu and environment in this country in which Indigenous musicians find themselves. While Indigenous musicians have developed capacity and pursued their passions, Canada is reaching out, seeking out and embracing the unique sounds and stories that Indigenous musicians have to share. In this post TRC-era, the current cultural environment in Canada is more hospitable for, and interested in, Indigenous music than it has ever been.

A key message from this study is 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. The study shows 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.

"Canada, you are in the midst of an Indigenous renaissance. Are you ready to hear the truths that need to be told? Are you ready to see the things that need to be seen?"

What is the impact of Indigenous music in Canada?

INTRODUCTION

There are some key questions that have never been asked in a national, comprehensive way: What is Indigenous music? Who and what makes up the Indigenous Music Community? What are their realities? What is the impact of Indigenous music in Canada? What are the contributions that the Indigenous music community is making to the economic and social fabric of Canada?

While Indigenous peoples have been making and sharing music for thousands of years, and Indigenous musicians have been part of the Canadian music industry, and sometimes transcending and leading it, for several decades, there has never been a comprehensive picture of the impact of Indigenous music in Canada or an analysis of the contributions of the Indigenous music community. This National Indigenous Music Impact Study has been undertaken to address that gap. In fact, **this report represents the best available – and most recent (as of 2019) – data on any segment of the music community in Canada.**

ECONOMIC IMPACT

Indigenous music contributed a total of almost $78 million to Canada's economy (GDP) in 2018.

At the same time, it supports more than **3,000 full time positions** across the country.

Annually, Indigenous musicians (including both full time and part-time artists) **earn an average of $47,200** from all sources however, almost half (47%) of income earned by Indigenous music artists derives from non-music work.

Companies in the Indigenous music community reported that almost half (47%) of their activities last year were related to developing Indigenous music. These activities incurred $17.5 million in expenditure directly related to music by Indigenous artists.

THE INDIGENOUS MUSIC COMMUNITY

Indigenous peoples have been making music in this land 'since time immemorial' and music is an integral part of all Indigenous cultures. Colonialism had deep and devastating impacts on the practice of music and cultural expression by Indigenous peoples; and dark chapters such as residential schools, the *Indian Act*, forced Inuit relocations and other systemic acts of discrimination meant a severe loss of language and cultural memory. However, music and dance have never been eradicated and, particularly since the 1960s when the civil rights movement and the American Indian movement gained momentum, there has been a resurgence and revitalization of Indigenous rights, Indigenous activism, Indigenous language and culture and Indigenous arts, including music.

Indigenous musicians have contributed to the Canadian music industry for decades, from trailblazers who have something powerful to say about political and social issues such as Tomson Highway and Wille Dunn, to Canadian Music Hall of Fame inductee Buffy Sainte-Marie, to award-winning musicians in every category and every genre of music from William Prince to A Tribe Called Red to Jeremy Dutcher to a dozen others. 25 years ago, Susan Aglukark was one of the only northern Indigenous musicians known widely by Canadians. Since then, there has been exponential growth and today we have artists such as Leela Gilday, Lucie Idlout, Tanya Tagaq as well as groups Twin Flames and the Jerry Cans.

There is no agreed-upon definition of Indigenous music. It is not a genre of music. As one interview respondent said, "It's really tricky to summarize into one clean genre, to fit in one category. It's really tricky for us Indigenous artists because…[my music fits into] different genres, different styles, [it's] experimental…and the indigeneity just comes with it, the experience." When Indigenous classical musicians met in Banff, Alberta in February 2019 as part of a national gathering, they developed and issued a statement on Indigenous musical sovereignty, which exemplify what other musicians articulated as part of this study. "Simply, a work is Indigenous when it is created by an Indigenous artist, regardless of theme or topic. A story is Indigenous whether it comes from ancestral knowledge, lived experience or imagination" (Derksen, McKiver and Cusson).

The Indigenous music community today is characterized by immense diversity, working in every existing genre as well as transcending genres. Their music, and the musicians themselves cannot be, and often resist being 'pigeon-holed'.

Indigenous music contributed a total of almost $78 million to Canada's economy.

Photo **Brad Crowfoot**

A majority of the artists surveyed are solo performers or recording artists.

ARTIST PROFILE

Artists cited various reasons for making music, including:

- Making connections
- Music is medicine
- Sharing culture and educating Canadians
- Inspiring other Indigenous peoples
- A platform for political views and messages

Indigenous musicians are **young;** more than 40% of survey respondents were under the age of 34. More than one-third live in large urban centres while a quarter live on a reserve and four in ten in smaller communities or towns. Most artists live in their home region, although one in five (22%) say they moved for their music career.

A majority (68%) of the artists surveyed are **solo performers** or recording artists while the remainder were part of a group, and nearly 75% of interview respondents are independent, unsigned artists. The majority **do not have a manager** or management company. Those who are full-time artists are almost twice as likely (17%) to use a music or booking agent than all artists—full and part-time (9%).

A large majority of artists (71%) are **involved in both live and recorded music.**

More than a quarter (27%) of artists **use, perform or record music in an Indigenous language;** this was closer to 50% among interview respondents which may simply be because it was important to speak to a wide, representative group of musicians. Among survey respondents, the most commonly used languages are Cree (21%), Anishnaabemowin/Ojibwe (17%), Mi'kmaq (11%), Inuktitut (7%) and Innu (7%). Mid-career artists are most likely to use an Indigenous language in performances or recordings (31%).

The two most common genres among the artists who participated in the survey are **Folk/Roots (32%) and Rock (32%)** followed by Blues/Jazz, Alternative/Indie, Country and Rap/Hip Hop. 15% chose 'Other'. In the Territories, hand drum was one of the top genres while R&B/Soul was one of the top genres in British Columbia. Full time artists are more likely to work in pop (21%) than part-time artists (17%) while part-time artists were three times as likely to work in Hand Drum (15%) as opposed to full-time artists (5%).

Less than a quarter (23%) of artists work in music full-time. Those who work at music full-time are less likely (7%) to work full-time in live music than those who work at music part-time (16%). More full-time musicians (81%), however, work in both recorded and live music than part-time musicians do (68%). Most have other work, with 40% of artists indicating that they have full-time work of more than 30 hours a week, in addition to music related work. Artists who do not work in music full-time work in a variety of industries; interestingly, more than half (51%) of them work in creative occupations. Artists from the Atlantic region earn the least amount of income from music but spend more time on their music, compared to other regions.

More than half (55%) of artists spend somewhere **between 10 and 30 hours per week** on music-related activities; another one in ten (13%) spend more than 30 hours per week. The proportion who spend more than 10 hours per week is highest among established artists (81%), followed by emerging artists (74%), and relatively lower among mid-career (64%) and new (54%) artists. Compared to the typical Canadian artist, Indigenous artists are **somewhat more likely to work on music part-time** (77% compared to 65%). The top other non-music-related work includes office/administrative work (20%), arts-related employment (19%) and teaching/coaching (15%).

When it comes to their music, a large majority (82%) of artists are **self-taught**. Many also learned from peers (52%) or family members (32%). Only 16% of artists reported receiving formal music education at a music school and only 9% reported learning about the business of music in college, university or music school; the business aspect of music was also typically self-taught (58%).

More than five in ten (55%) artists **have never received funding** for some aspect of their music career. Among those who have received funding, the most common sources of funding reported are Canada Council for the Arts (18%), provincial/territorial funding (16%) and FACTOR (12%).

A quarter of artists surveyed reported earning all of their income (100%) from music. Further analysis of full-time musicians shows that Indigenous artists who spend full time hours on music have higher annual income than those who work at music part time and have other employment. On average, **about 53% of all income is earned from music-related activities. The average annual income for full and part-time Indigenous musicians is $47,200.**

Artists surveyed reported various sources of income. They rely on live music and touring (27% of music income), recorded music sales (15%) and neighbouring rights revenue (15%). For full-time musicians, income from live music and touring make up the largest amount of all income.

Outputs
On average, artists **performed at 23 live events/shows over the last 12 months**. Artists performing in some music genres had more shows than others – for example, Folk/Roots and Blues/Jazz artists performed at more shows than Rap/Hip-hop and Electronic Music artists.

More than one-third (35%) of artists indicated that **their fans are located within their province or territory.** More than one-fifth (21%) of artists reported having fans across Canada and around 16% of artists indicated that most of their fans are located across the globe.

Most artists surveyed **use social media** (83%) and word-of-mouth (80%) to promote their work. These media are much more widely utilized than more "traditional" (and often paid) marketing tools such as radio or newspaper ads, event listings or posters. Only a minority (42%) have a web site that is used to promote their music.

The Indigenous artists included in the survey have **released an estimated total of 50,500 albums and 22,500 individual songs (not in albums).** For 98% of the albums, artists own the master rights and have not signed a record deal. Artists also own 63% of individual songs released.

Approximately 23% of recording artists sold at least one album in 2018. The estimated total number of albums sold is dominated by a small number of higher-volume artists (four respondents estimate they sold 500 or more albums in 2018).

23% of recording artists sold at least one song (not part of an album) in 2018; again, the total number of songs sold is dominated by a small number of higher-volume artists (three respondents estimate they sold 100 or more songs in 2018).

Half (54%) of recording artists were able to estimate how many plays their music received in 2018. On average, they report almost 3,000 plays across all digital platforms.

Six in ten (59%) artists have at least one song registered with a music rights organization, the most common – by a large margin - being SOCAN (51%). The following additional organizations were mentioned: Sound Exchange (14%); MROC (6%); ACTRA-RACS (6%); CMRRA (4%); Connect (4%); SOPROQ (3%); SODRAC (2%); Re:Sound (2%) and ARTISTI (1%).

COMPANY PROFILE

The company representatives who completed the survey represent a variety of business structures. The most common are **registered non-profits** (31%), followed by registered sole proprietorships (26%). Only a minority (20%) are not registered.

A wide variety of business types are represented in the sample (and many fit more than one category), but the **most common are music/ artist management** (31%), arts/cultural organizations that program music (28%), music producers (27%) and music promoters (25%).

Outputs
On average, companies worked with 43 musicians last year, of which 45% were Indigenous musicians. 47% of companies' activities relate to developing Indigenous music.

On average, **record labels sold 101 albums and 24 individual songs per company recorded by Indigenous artists last year**. It must be noted however, that only Canadian record labels participated in the survey. The data does not reflect the fact that some Indigenous artists are signed to other major labels such as Sony, Warner and UMC.

Record labels, music producers or recording studios recorded with 4 Indigenous artists on average last year; or an average of 161 hours.

Record labels received almost 700 plays on average last year for their music (all music including music by Indigenous artists) across all digital platforms

Booking agents, venues, bookers and promoter companies booked 32 live performances on average last year, two-thirds of which (67%) were booked for Indigenous musicians.

Based on the survey data, there was an average annual attendance of more than 11,000 at all events featuring Indigenous musicians, booked by venues, festivals and pow wow committees.[1] Nearly 70% of visitors came from within a 15-minute drive to a live performance.

[1] Because there is no available data on the number of events that featured Indigenous artists last year, it is not possible to estimate the total number of attendees across all events.

BARRIERS AND CHALLENGES

Systemic barriers remain a challenge for Indigenous artists; overcoming colonial structures and assimilationist policies have been detrimental to Indigenous artists.

Funding access (41%) is the top perceived challenge by survey respondents, both for artists trying to build a music career and for businesses and others who support them. Other common challenges include marketing and promotional activities to build an audience (28%) and geographic location (22%).

Other challenges cited by interview respondents include mastering the business aspects of the music industry; Indigeneity; and other artistic challenges.

SUCCESSES AND OPPORTUNITIES

Key factors cited by interview respondents in their success include family, community and support networks; hard work and resiliency; having access to mentors; commercial success; collaborating with other musicians.

Other broader and positive elements that have contributed to the success of Indigenous musicians include: more grants and funds for Indigenous musicians; increased support from provincial/territorial arts and music organizations; easy access to audiences through social media; more opportunities for collaboration and participation at festivals; and an increase in awareness and interest in Indigenous issues due to the Truth and Reconciliation Commission.

On average, record labels sold 101 albums and 24 individual songs per company recorded by Indigenous artists last year.

Photo **Phil Starr**

Indigenous artists want more professional stage opportunities.

CONSIDERATIONS FOR FURTHER DEVELOPMENT

Building Relationships
Management companies, managers, agents, promoters and publicists who work with Indigenous artists would benefit from Indigenous cultural awareness training.

There is a need to promote greater awareness of the diversity of music by Indigenous artists; there is no such thing as 'Indigenous music' as a genre or classification.

There is a need to increase opportunities for Indigenous musicians to collaborate, increase their skills, network and encourage each other.

There is a need for strategies to encourage and support more mentorships between emerging and established Indigenous artists, and also between Indigenous musicians and professionals in the music industry, and particularly those on the business side.

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.

Creating Opportunities
It is necessary to ensure Indigenous musicians can assert musical sovereignty.

Indigenous artists want greater access to mainstream media and to fans. Consider ways to increase the percentage of Indigenous music on mainstream, Indigenous and satellite radio stations.

There is considerable room for greater Indigenous inclusion in music industry companies and a need for more Indigenous-owned and operated companies.

There is a need, regarding all Canadian music awards, to ensure the Indigenous music community develops the criteria for the awards; the criteria may need to be more inclusive; and there needs to be more Indigenous musicians who sit on juries and decision-making bodies in selecting the award-winners.

A database or comprehensive list of all funding opportunities for Indigenous artists would give Indigenous artists an opportunity to know what grants and funds are available to them.

There is a need to address the underrepresentation of music by Indigenous creators on TV, in film and on streaming services.

Indigenous artists want more professional stage opportunities.

Indigenous artists appreciate opportunities to play at music festivals and be included in mainstream multi-disciplinary arts festivals.

Providing Training and Support
Musicians are asking for more training opportunities to learn more about the business aspects of the music industry.

Many musicians said they need more training and support for how to best use social media and how different platforms work and can enhance their exposure to a wider audience.

There is an acute need for professional development and training in small, rural and remote communities across the country.

Some Indigenous musicians, particularly emerging musicians, are not fully aware of the benefits and opportunities presented by registering with music rights collectives such as SOCAN. Specific training or awareness-building workshops would address that need.

Indigenous youth must be introduced to and take advantage of the training and educational opportunities that lead to careers in every facet of the music industry.

Consideration should be given to investments in music education for Indigenous youth.

Financing and Funding
Strategic equity investments will be required to address many of the needs identified in this study, including enhanced grants and contribution programs to support and expand opportunities for new, emerging and established Indigenous artists.

Program, project and event funding must reflect the higher cost of living in the far North and on reserve and in remote regions, as well as travel to and from the far North, rural and remote communities and First Nations.

Efforts are required to establish a consistent and comparable baseline of support for Indigenous musicians in every region.

A broader, comprehensive transformation is needed to ensure that funding envelopes, criteria, application forms, and reporting requirements are culturally appropriate, accessible, and reflective of the sector's realities.

Additional assistance, particularly through one-on-one telephone and in-person guidance, would benefit Indigenous musicians in filling out grant and funding applications.

Indigenous Cultural/Music Sovereignty
The various levels of governments and publicly-funded arts and music organizations in Canada, in the spirit of reconciliation, have a responsibility to reach out, integrate and incorporate Indigenous ways of knowing and perspectives in all aspects of the music industry in this country and make way for more Indigenous-owned, operated and directed companies. A specific, practical step to advance many of the findings in this report would be the establishment of an Indigenous-led National Indigenous Music office or organization.

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Photo **Brad Crowfoot**

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introduction

"***Canada, you are in the midst of an Indigenous renaissance. Are you ready to hear the truths that need to be told? Are you ready to see the things that need to be seen?"***

Those are the words of Jeremy Dutcher, Mi'kmaq musician and composer, as he accepted the 2018 Polaris Prize. Indigenous musicians have emerged and achieved widespread success and popularity across this country; particularly in the last decade, artists and performers have moved beyond their traditional performance and broadcast niche, and are a recognized and influential element of Canada's musical mainstream.

When the Truth and Reconciliation Commission (TRC) issued its report and Calls to Action, it sparked numerous events and conversations about how Canadians must work to understand, work with and listen to Indigenous peoples. In the music community, conferences such as the Forward Currents festival in Regina and the collaborative musical presentation ***Sounding Thunder: The Song of Francis Pegahagabow***, produced by the Festival of the Sound in Ontario for example, provided avenues for collaboration and connection.

Ian Campeau, also known as DJ NDN is the co-founder and former member of A Tribe Called Red. In 2015, after the TRC issued its report, he spoke about how, in this current era of Truth and Reconciliation and the power of social media, Indigenous musicians like A Tribe Called Red have a platform and have been able to build audiences, both Indigenous and non-Indigenous. The group created a unique and innovative musical style that integrates hip-hop, traditional pow wow drums and vocals with electronic music production styles. Originally, he said the group's plan was to create music and 'throw a party' for Indigenous people in an urban setting; it has now become a powerful opportunity for reconciliation and connection.

> "When we created a space for Indigenous people in a cityscape, it became a very political statement just 'throwing a party'...a lot of people have been embracing Indigenous culture. Non-native people have been coming and listening to what we're doing and researching cultural stuff; the groups we're sampling. It seems that a lot of interest has come into Indigenous culture through just connectivity and showing it, showing our music on a national platform and sharing culture like that. This seems to be opening a lot of people's eyes up. And conversations are happening now on a way faster timeline than before with the advent of social media" (Truth and Reconciliation: how the arts shape our view of history).

While there may be increased interest, to date, however, there has been no comprehensive picture of the impact of Indigenous music in Canada or an analysis of the contributions of the Indigenous music community. This National Indigenous Music Impact Study (the "Study") has been undertaken to address that gap.

The purpose of the Study is to "understand the Indigenous Music Community in Canada at a national and regional level that uncovers the potential growth and the barriers to achieve potential growth." It is anticipated that the Study will create a critical baseline of information and enable a deeper understanding of this sector and its impact on both the economy and the social fabric of Canada.

This report begins with an overview of the project, exploring the background of Indigenous peoples and their engagement with the music industry across Canada; then a national and regional profile of Indigenous artists and Indigenous and non-Indigenous music companies; an assessment of the economic impact of music by Indigenous peoples in Canada; and the report concludes with considerations for future development.

"Right now, Indigenous music has really hit its stride."

Photo **Kelly Clark**

methodology

APTN contracted NVision Insight Group to oversee and conduct this National Indigenous Music Impact Study, with support from Nordicity and Environics Research.

This study includes qualitative and quantitative research methods, including telephone interviews, an online survey and a quantitative assessment of the economic impact of Indigenous music on the Canadian economy. In this report, "interview respondent" refers to individuals who participated in the qualitative phase; otherwise, the data is drawn from the quantitative online survey. All quotes including in this report are from interview respondents.

3.1 QUALITATIVE (INTERVIEW) METHODOLOGY

Three national strategic advisors (Indigenous peoples working in the music and arts community) provided advice and oversight and helped develop a regional, de-centralized approach to the qualitative phase of the Study, which was overseen by a regional coordinator and each regional coordinator was supported by a regional strategic advisor. Together the regional teams developed contact lists, organized, scheduled and conducted the phone interviews. A total of 70 phone interviews were conducted.

In this Study, responses to interview questions are not grouped according to the percentage of people who responded in a particular way; instead, the following quantifiers are used in this report:

- A few (less than 20%)
- Some (between 20-39%)
- Just under/just over half (40-59%)
- Many (between 60 and 75%)
- Most (more than 80%)

3.2 QUANTITATIVE (SURVEY) METHODOLOGY

As no national economic data exists on the Indigenous music community and industry, and existing published sources (e.g., Statistics Canada) are not comprehensive, an online survey of music industry professionals was the key methodology for gathering quantitative and economic impact data.

The online survey was linked to APTN's web site and was approximately 20 minutes in length. There were 72 survey questions.

A total of 620 individuals participated in the survey. When asked to identify their role in the Indigenous music industry (they could select more than one category), the sample breaks down as follows:

- 374 artists (60%)
- 124 businesses (18%)
- 176 supporters (26%)

"Music brings about change. We have a strong responsibility as artists to bring positive and important messages."

Table 1: Regional Breakdown of Survey Respondents

	Artists	Businesses	Supporters
West	**199**	**59**	**53**
British Columbia	79	23	21
Alberta	41	8	16
Saskatchewan	28	5	4
Manitoba	51	23	12
Ontario	**82**	**33**	**33**
Quebec	**29**	**12**	**7**
Atlantic region	**30**	**10**	**9**
New Brunswick	18	5	3
Nova Scotia	9	5	4
NFLD	1	-	1
PEI	2	-	1
Territories	**20**	**4**	**2**
Yukon	9	1	1
NWT	10	1	-
Nunavut	1	1	1
Outside Canada	**10**	**6**	**2**

Upon completion of the survey, tabulated data was provided for analysis and reporting. Typical data cleaning was conducted following data collection (e.g. addressing or removing false, blank or questionable entries). This survey is based on convenience, non-probability sampling methods.

The survey data is unweighted, since there are no reliable population statistics for Indigenous artists. However, the regional distribution of participating artists corresponds to the overall Indigenous population (2016 Census data). Please see Section 5.1.2 for a regional and demographic profile of participating artists.

Economic data from the survey and other sources were used to create the economic impact analysis portion of this report. Quantities reported in the economic impact section (e.g., total albums sold, total income, etc.) and the output section (e.g., albums, songs and plays) are "grossed up" (i.e., extrapolated to the universe of Indigenous artists). In this way, the results of the study incorporate the experience of music artists who make the most of their annual income from something other than music.

For *artists*, the extrapolation was conducted by drawing upon the results of *Statistics Canada's Statistical Profile of Artists in Canada 2016*, which indicates the total number of Indigenous persons in Canada who make the majority of their income from music. Using survey results about the sources of artists' income, an estimate for the total number of Indigenous music artists was created.

For *companies*, two gross-ups were undertaken: one for recorded music companies and one for live music companies. For sound recording, the best available national data was from Statistics Canada's North American Industrial Classification System (NAICS) codes relating to sound recording (i.e., 512230, 512240, 512250, and 512290), which indicate that there are approximately 356 sound recording companies in Canada. As such, the survey captured data from about 22% of such companies. For live music companies, no national data was available, though provincial studies have been done (in BC, Ontario and Manitoba). To be as conservative as possible, the gross-up was conducted on the highest provincial response rate (Manitoba), which resulted in the smallest gross-up (wherein the survey captured data from 55 of 172 live music companies, or 18%).

In general, there are two parts to any economic impact assessment. The "direct impact" and the "spin-off impacts". These two types of impact each contribute to gross domestic product (GDP), employment (expressed in terms of "full-time equivalents" or "FTEs"), and tax revenue

(both provincial and federal). In the context of the music industry, these types of impact can be understood as follows:

- Direct impact: the sum of all income paid to employees of any music companies, plus the total income of music artists;
- Spin-off impacts: the positive economic effects spending of music artists and music companies outside of the music industry.

Given that much of the spending of artists and music companies occurs within the music industry (e.g., an artist paying their manager, or a promoter paying a venue, or a recording label paying an artist manager), the project team isolated these relationships as part of the economic impact modelling process.

For further details on the methodologies used to conduct this Study, please refer to Appendix A.

3.3 CAVEATS AND LIMITATIONS

The survey data in this Study has not been weighted or normalized because there are no reliable statistics on the Indigenous artist population (by age, gender or region) to weight to. Survey results reported as they are can be identified by the word "average" or by percentages. In general, words such as "in total" or similar imply that the survey data (e.g., total albums sold, total plays, total income, etc.) was grossed-up. On the other hand, where it says "on average" or similar, the averages were calculated from survey responses without grossing up. As there is no definition or agreement regarding the term 'Indigenous music', instead, in this Study, references are made to 'music by Indigenous artists'.

The authors would like to acknowledge the possibility of some sampling bias in the results, from two key sources. First, the survey was publicized through various methods by APTN and its partners. Thus, by definition, the survey excludes artists who did not hear about the survey through these publicity efforts. Second, all survey respondents filled out the survey questionnaire online. Although other, offline (paper-based) versions of the survey were offered

> "Music for me is an outlet, an emotional release. It's how I tell my story, how I connect with people. It is healing and it truly is medicine."

and available, no one chose to take advantage of these. Thus, some potential survey respondents may not have been able to access the online survey due to lack of Internet access or limited bandwidth, or lack of computer or laptop. Accordingly, the results likely better reflect those members of the Indigenous music community with enough time and financial resources to be able to complete an online questionnaire.

Interviews and the online survey questionnaire were conducted in English or French. Interviews in Indigenous languages were not conducted and the survey was not available in any Indigenous language. This approach may have limited the ability for artists whose first language is not English or French to participate.

While the results of the survey depict artists and companies with some confidence at the national level, regional and provincial data must be viewed with caution. The response rates from these sub-regions lend themselves, at best, to indicative results.

Finally, while some data included in this report would be better presented in comparison with the wider Canadian music industry, comprehensive data on that industry is very limited. Where such data does exist (e.g., as part of Statistics Canada's *A Statistical Profile of Artists in Canada in 2016*), it is dated (e.g., is from 2016) and/or describes a different segment of Canada's music community. For example, the National Occupation Code 5133 (Musicians and Singers) incorporates any Canadian whose primary source of income is playing and/or teaching music. It does not, however include part-time musicians and music-related artists (such as dancers in pow wow performances). At the same time, it is not advisable to compare the results of this study to the results of provincial data. Doing so would require one to assume that the province in question is typical (and thus can stand-in for Canada as a whole). There is no available data to support such an assumption.

In effect, this report represents the best available – and most recent (as of 2019) – data on any segment of the music community in Canada.

3.4 POTENTIAL AREAS FOR FUTURE RESEARCH

While conducting research for this study, a number of other areas of inquiry came to light and are worth mentioning for further study. All further study should be considered, determined and developed with Indigenous cultural sovereignty in mind, and it is the Indigenous music community that will determine appropriate lines of inquiry and research methods. Some of these potential areas for future research include:

Indigenous Music Industry. What are the statistics and stories around Indigenous musicians who participate in Indigenous-controlled events, venues, spaces, etc., compared to those in mainstream events and venues? What are the differences between Indigenous-owned and controlled music companies vs. mainstream companies and what is this impact on Indigenous musicians?

Traditional/Customary Indigenous Music. What is it? How is it understood in the context of an Indigenous aesthetic? Who is making it? Where is it thriving? What are the specific needs and aspirations of these musicians? It is difficult to use terms like "traditional" and "contemporary" – is there a dichotomy?

Cultural appropriation. What is cultural appropriation of Indigenous music? How is and can it be addressed? Who monitors and safeguards music by Indigenous artists? Why is or is this not necessary? This issue is relevant given that a group of Inuit musicians boycotted the Indigenous Music Awards in April 2019 because of their opposition to a Cree artist whose debut album features throat singing which prompted a debate about cultural appropriation.

Inspiration. Who are the Indigenous and non-Indigenous musicians that have inspired the current Indigenous music community? What have they incorporated from them into their own music? How has it influenced their style, genre, approach to music in general?

Funding. As more and more funding envelopes are available to Indigenous musicians, and in some cases, the maximum grant amounts available are increasing, what impact is this having on the Indigenous music community? What are the ripple effects of artists who receive funding for the first time? What are the ripple effects of artists who receive ongoing funding? What does this mean for young and emerging artists? For artists who are able to pursue a career in music full-time? What is the most significant type of funding for Indigenous musicians? (For example, grants to attend music retreats, funding to collaborate with other artists, funding for marketing and promotion, funding for travel to festivals). What can we learn by comparing mainstream artists and Indigenous artists access to, and use of, funding?

Photo **Jordon Thomas**

background and context

4.1 STUDYING AND UNDERSTANDING INDIGENOUS ARTS AND CULTURE

This study is influenced by a framework that places Indigenous arts and culture in context. Indigenous arts practices, including music, are different from mainstream arts practices and these differences must be understood and must underpin any study about Indigenous artists.

In this framework, which is succinctly articulated in a context brief from the Canada Council for the Arts, there are three ways in which to understand and view Indigenous artistic practice.

1. **Differing worldviews.** Indigenous peoples "posit an understanding of the connectedness of all things (objects, people and the ethereal) in an inter-related cosmology" (Canada Council for the Arts 2).
2. **Colonial history.** Until recently, Indigenous arts were described as ethnic or folk art, or exotic or craft. Western, European notions of art and art practice were the standard.
3. **Cultural Sovereignty.** Indigenous artists get to define what is art, how it is made, who is an artist. After centuries of colonialism and attempts at extermination or assimilation, Indigenous artists are asserting sovereignty and demanding respect and self-determination.

This study works within this conceptual and contextual framework and it has influenced the study methodology, the research team, the study participants and the framing of the results in this study.

4.2 HISTORY OF INDIGENOUS PEOPLES AND MUSIC

Indigenous people have been making music in this land for thousands of years or, as Brian Wright-McLeod says in the *Encyclopedia of Native Music*, 'since time immemorial'. Every nation and culture, from Inuit to Haisla to Anishinaabe to Onkwehonwe to Mi'kmaq and dozens of others, have songs and music that have been passed down through the generations. The land now called Canada is infused with the music of Indigenous peoples. The heart of that legacy is now finding new and innovative expression in every style, every genre, and every song from Indigenous musicians.

Indigenous musicians make music unique to, and influenced by this land now called Canada. While musicians have incorporated musical styles and practices from other countries and other cultures, this territory now called Canada is home.

Music is part of culture. In many Indigenous cultures, the drum is considered 'the heartbeat of the earth, our mother.' Sacred ceremonies often involve music and dancing. Language is taught through songs. The late Anishinaabe Elder, language teacher and translator Shirley Williams helped preserve songs and music from her community in northern Ontario, and summed it up in her poem from 1969:

A hundred thousand years have passed
Yet I hear the distant beat of my father's drums.
I hear his drums throughout the land.
His beat I feel within my heart.
The drum shall beat
So my heart shall beat
And I shall live a hundred thousand years (Gooderham 196).

Indigenous peoples are reclaiming cultures and traditions, including music, in response to the systematic assault on Indigenous ways of life and cultural practices of the past 500 years. The *Indian Act* imposed by the Canadian government in 1876 banned numerous sacred and cultural ceremonies and practices, including the potlatch. Gatherings for dancing and singing were also prohibited and enforced by Indian agents who regulated the lives of First Nations families and individuals on reserves across the country. Sacred objects, including musical instruments, were stolen and sold to collectors or sent to museums around the world. Anthropologists took Indigenous stories and songs without providing compensation, often misunderstanding or misconstruing the messages and lessons in those songs and stories.

Alongside the rise of the American Indian Movement and the Civil Rights movement in the 1960s, there began a resurgence and emergence of Indigenous musicians showcasing their unique contributions to the music industry and a re-emergence of some of the musical traditions that had earlier been forced underground or made illegal. At this time, we saw Buffy Sainte- Marie emerge as a powerful Indigenous voice. There were ground-breaking music videos created through the *Challenge for Change* film series in 1969 in which musicians such as Willie Dunn challenged and confronted colonialism and raised awareness of Indigenous issues. And starting in the 1970s and 80s, people could hear and watch Indigenous musicians on community, northern and Indigenous radio and TV stations.

Yet it has only been in the last 20 years or so that Indigenous musicians have been strategically supported and honoured.

National arts institutions such as the National Gallery of Canada and the National Arts Centre have only begun to highlight and promote and support Indigenous artists in the last two decades; the Canada Council for the Arts did not specifically support Indigenous artists until the 1990s.

The JUNO Awards first awarded the Indigenous Album of the Year in 1994, won by Wapistan and the following year, Buffy Sainte-Marie was inducted in the Canadian Music Hall of Fame.

And while music festivals have long featured Indigenous musicians, the emergence of Indigenous music awards, Indigenous music festivals, Indigenous music funding and Indigenous music gatherings is relatively new in Canada.

4.2.1 INDIGENOUS MUSICIANS—AN OVERVIEW

There are a number of Indigenous trailblazers in the music industry who have inspired generations of musicians. These include but is not limited to musicians such as Buffy Sainte- Marie, (the late) Willie Dunn, Jerry Alfred, Shingoose, Kashtin, Susan Aglukark, Métis fiddler John Arcand, Billy Joe Green and rock legend Robbie Robertson, among others.

Following in their footsteps are award-winning established artists such as Murray Porter, Derek Miller, Crystal Shawanda, C-Weed band, Warparty, Eliot Britten, Eagle & Hawk, Andrea Menard, and Digging Roots. There are also emerging artists such as Lindsay 'Ekwol' Knight, William Prince, Shane Yellow Bird, and dozens of others.

> "There's a lot of healing power in music. It's really important just to be involved, keep playing, keep writing and keep performing. Then people can see that they can do it as well."

Northern musicians and groups are making waves like Leela Gilday, Twin Flames, the Jerry Cans and Lucie Idlout, We now see electronic groups such as Zibiwan and See Monsters, and genre-transforming musicians and groups like IsKwé, Tanya Tagaq, Jeremy Dutcher, Snotty Nose Rez Kids and A Tribe Called Red.

There is a flourishing traditional music scene, encompassing pow wow and drum groups such as the award-winning and Grammy-nominated Northern Cree, the Red Bull Singers, the Black Bear Singers, Bryden Gwiss Kiwenzie, and traditional flutist David Maracle.

The surge in Indigenous music goes beyond performing artists to other domains, including more composers, producers, engineers and other professionals. John Kim Bell and Tomson Highway were composing music more than three decades ago. Since then, we have composers in contemporary, traditional and classical genres from Andrew Balfour, to Cris Derksen and Orchestral Pow Wow, Barbara Croal and many others. Others such as Métis ethnomusicologist Annette Chretien, producers such as Denise Bolduc, Elaine Bomberry, Vince Fontaine, Alan Greyeyes and Margo Kane; award-nominated and winning engineers like Mark Nadjiwan, Dallas Arcand; and a growing roster of others.

Recently the ground-breaking work of multimedia and experimental artists such as Jeremy Dutcher, Melody McKiver and Cheryl L'Hirondelle has been attracting critical, popular and media attention.

Indigenous musicians are now being recognized through various music awards. The highest profile mainstream example is the Indigenous Album of the Year award at the JUNOs, open to traditional Indigenous music styles and "fusions of all genres of contemporary music that incorporate traditional Indigenous music styles and/or reflect the unique Indigenous experience in Canada, through lyrical expression" (JUNO Awards, n.d.). Other Indigenous-specific awards are now offered through the Canadian Country Music Awards, the Canadian Folk Music Awards and regional events such as the East Coast Music Awards.

"I define my music as contemporary and Indigenous... for now... but I do not want this to define me. Those are just the styles I've explored so far"

Additional exposure comes through recognition through the Indigenous Music Awards, the sākihiwē festival in Canada, the Native American Music Awards and the Indian Summer Music Awards in the United States.

Early and current shows on APTN (*Buffalo Tracks, Arbour Live, Inside the Music, Guilt Free Zone*), CBC radio (*Reclaimed, Unreserved*), CBC TV, and other radio and television networks are featuring Indigenous music and Indigenous musicians. The recent critically acclaimed documentary *Rumble: Indians who Rocked the World* introduced a global audience to the impact and role of Indigenous music in popular culture, and other movies and plays are featuring greater numbers of Indigenous artists and musicians.

Artists are now supported through a range of Indigenous-specific or Indigenous/regional-focused record labels, companies and promoters such as Sunshine Records, Canyon Records, Turtle Island Music, Arbor Records, RPM, Musique Nomade, Rising Sun Productions, SAMAYA Entertainment and Aakuluk Music.

More than 100 First Nations communities across Canada have local radio stations that play Indigenous music. Early supporters were stations like Wawatay radio and CKRZ in Six Nations, one of the largest; regional Indigenous stations like CFWE in BC, Native Communications Incorporated (NCI) in Manitoba, which airs the long running, syndicated weekly Indigenous Music Countdown; Missinippi Broadcasting Corporation (MBC) in Saskatchewan; and many university and college campus radio station with dedicated Indigenous music programs. Aboriginal Voices Radio celebrated Indigenous musicians in several cities in Canada in the late 1990's and early 2000's. There are now five newly-licensed, Indigenous-themed urban radio stations in Vancouver, Edmonton, Calgary, Toronto and Ottawa. CBC radio now has a weekly show *Reclaimed* on Indigenous music.

There are a rising number of opportunities for Indigenous artists to participate in residencies such as the Indigenous Music Residency (formerly AMP Camp) and the Indigenous Music Retreat in BC organized by the First Peoples' Cultural Council. An increasing number of regional and provincial organizations like Aboriginal Music Manitoba are providing support for the growth and development of the Indigenous music community in their respective jurisdictions.

Local, regional and national festivals from music-specific festivals to Indigenous festivals to arts and culture festivals are providing space and opportunities for Indigenous musicians, from Talking Stick Festival, to ADAKA Festival, Summer Solstice festivals, Dreamspeaker Festival, Rez Bluez, Aboriginal Music Week, John Arcand Fiddle Festival, Tributaries and BIZIINDAN! at Luminato Festival, and many others.

The growing awareness and recognition of Indigenous music has led to opportunities for Indigenous musicians to connect and raise awareness of important issues. One example is the gathering of Canadian-based Indigenous classical musicians who met in February 2019 to discuss the direction of classical Indigenous music and music practices. Another example is the 2019 Folk Alliance International Conference which hosted an Indigenous music summit to discuss issues facing the Indigenous music community, and featured nightly showcases and performances by nearly 30 musicians and musical groups.

"I could have been a lawyer, a doctor but at the end of the day when you leave this world, what are you going to leave behind? I want to leave a legacy."

The Polaris prize for the best full-length Canadian-based album on artistic merit, has honoured Indigenous musicians four out of the past five years (Tanya Tagaq, Buffy Sainte-Marie, Lido Pimienta and Jeremy Dutcher).

4.2.2 WHAT IS INDIGENOUS MUSIC?

In his seminal book, *The Encyclopedia of Native Music*, music journalist, host and writer Brian Wright-McLeod poses the question, "What is Native Music?" His answer can serve as a roadmap for this National Indigenous Music Impact Study.

> Is it the music or the musicians that make it Native? I suppose it's fair to say that it's a bit of both. It's the music of the people who have known the land since time immemorial, but it has also been transformed along with the people and the land to become the hybrids of modern sounds we recognize today (Wright-McLeod 3).

When Indigenous classical musicians met in Banff in February 2019, they developed and issued a statement on Indigenous musical sovereignty, a part of which reiterated what Wright-McLeod wrote, and is a clear and articulate summation: "Simply, a work is Indigenous when it is created by an Indigenous artist, regardless of theme or topic. A story is Indigenous whether it comes from ancestral knowledge, lived experience or imagination" (Derksen, McKiver and Cusson).

There is no such thing as 'Indigenous Music' as a genre. The 'hybrids of modern sounds' that Wright-McLeod described when referring to the transformation of Indigenous music incorporate every conceivable music style from vocalizations in pow wow singing and throat singing to country, hip hop, pop, folk, jazz, classical and every other genre, as well as artists whose styles do not neatly fit into any genre, or whose music transcends

the notion of "genre" altogether. Genre distinctions are also often a function of marketing in that the music by some Indigenous musicians is difficult to market or promote in previously established ways, or that if Indigenous artists exist outside of the mainstream Canadian music market, then they do not fit neatly into existing mainstream music genres. Some even coin new terms (like 'bush rock' or 'native rap') for their music. Today music by Indigenous artists can be contemporary, traditional/customary, or any conceivable blend of both or 'none of the above.

"My music is a blend of traditional and contemporary. It's kind of modern but I use my [Indigenous] language so it's traditional in that sense."

In a discussion about hip hop among Indigenous youth in Saskatoon, Charity Marsh explains how some adapt and adopt contemporary music styles and genres to reflect their traditions and cultural values.

> Today, music and cultural practices represented as "traditional" (e.g., drumming, round dance singing styles, pow wow dancing, etc.) continue to play a primary role in the preservation of identity, culture, and resistance for Indigenous peoples. And yet many Indigenous youth living in Saskatchewan are turning toward the arts practices of hip hop culture (rapping/emceeing, DJing/beat making, break/hip hop dancing, and graffiti arts) as a way to express and make sense of present-day lived experiences, including the ongoing legacies of state enforced residential school programs and the other practices of colonization, the current climate of contentious government initiated truth and reconciliation processes, and systemic issues of racism, poverty, and violence faced by young people today" (Marsh 347).

The same can be said of many other genres. One respondent said, "I don't have a name for the type of music; that's just how I sing." Some respondents said their music is a "fusion of genres" though one respondent suggested that the term "fusion" is antiquated, and that Indigenous music cannot be pigeon-holed.

> It's really tricky to summarize into one clean genre, to fit in one category. It's really tricky for us Indigenous artists because I don't like to call myself an indigenous rapper. I say I'm a rapper and that's what I do, but different genres, different styles, experimental...and the indigeneity just comes with it, the experience

> Indigenous musicians, like musicians the world over, write songs about the human condition. Indigenous musicians, however, will also use music to express their thoughts and feelings about their own Indigenous experience. As Veronique Audet explained in an article about Innu popular music:

> Innu express what they live and what they think, putting their concerns and feelings about their personal and collective history and visions into words and music. There are many common themes in the songs, including identity; the appeal to solidarity, an assumption of responsibility, awakening; traditional life in the woods, the bond with the earth, the animals and entities of the land; the respect, attention, and transmission of the elders' words; alcoholism, problems of drug addiction and dependence; family violence and negligence; love, friendship, sorrows of love, adultery; praise and love for the family, parents, children; illness, death, suicide, the loss of loved ones; and sedentary life in the community or urban centres (Audet 274).

For many Indigenous artists, music can function, as Kerry Potts said in her thesis about the Indigenous music scene in Toronto, "as an anti-colonial weapon":

> Music is building vital connections to Aboriginal cultures, generating visibility of contemporary Aboriginal identities within public realms, and fostering relationships between Black and Aboriginal communities through musical genres such as blues and hip-hop...music has the potential to be a revolutionary tool that Aboriginal people can use to decolonize themselves and their nations (Potts ii).

4.2.3 THE INDIGENOUS MUSIC COMMUNITY

A central question that everyone was asked as part of this Study was to define or describe the 'Indigenous music community.' Their responses reflect each respondent's own response to and understanding of the phrase itself.

Some discussed the health of the community, and described it as 'vibrant', 'growing', 'expanding', 'burgeoning', 'thriving', 'evolving' and having 'a lot more presence now than it used to have'.

Some talked about the diversity of the Indigenous community, highlighting the fact that Indigenous people are making music in every genre, working outside of conventional genres, and even creating new genres. Some described the facets of the Indigenous music community that make it unique and eclectic. These include the ways that Indigenous musicians share "stories about the land and water and how we bring those forward in a relational way", the vibrant pow wow music scene, and the fact that Indigenous musicians cannot be 'pigeon-holed'. A few countered this, noting that once someone is labeled an "Indigenous artist", it can be difficult to break from that label and succeed in the mainstream music industry.

Many Indigenous musicians use music as a platform to expose colonialism and broader, oppressive policies that negatively impact Indigenous peoples.

Some respondents emphasized the fact that the Indigenous music community is small and 'tight knit'. People support each other and are willing to help and encourage each other.

"One of the things I aspire to achieve with my music is I need to express an Indigenous, modern way of life often misunderstood by mainstream, non-Indigenous cultures."

Others felt that more work is required to "support and create careers' and to provide opportunities for those who do not live in major cities. The community is 'still figuring out its potential and scope' so there are 'growing pains' that include economic barriers, ghettoizing, ongoing cultural appropriation, stereotyping, misogyny, and a music industry that is still looking for a 'token Indian'. There is no structure to the Indigenous music community; some 'spin their wheels' trying to find their way, and a few respondents said the community is divided and competitive.

Many respondents spoke about the emergence of young musical talent and the need to support upcoming young artists to show that music is a viable career option.

There was a distinction made by a few artists who spoke about the Indigenous music 'industry' as opposed to the Indigenous music community; how there is a need for more Indigenous-owned recording studios, managers, producers, technicians and companies.

"I believe that music allows me to fight our intergenerational trauma. Making music balances my spirit and I want to inspire others to dare to be themselves."

4.2.4 SUPPORT FOR INDIGENOUS MUSIC IN CANADA

Indigenous musicians and others in the community have access to various sources of funding and financing[2]. Indigenous musicians and companies can and do compete for funding with others in the industry, and are known for their innovation and talent. Interview and survey respondents recognized, however that there is a need for equitable funding. After years of systemic racism, injustice and discrimination, Indigenous musicians and music organizations need strategic investment. As the Canada Council for the Arts states in its equity policy document:

> Equity-seeking groups are those that face challenges in access, opportunities and resources due to discrimination and seek social justice and reparation. The current usage of the term "equity-seeking group" at the Council refers to any group requiring specific measures to improve access to programs and funding support (Canada Council for the Arts 5).

The Canada Council also designates Indigenous communities as a priority group that receives targeted support through the newly established department or section called **Creating, Knowing and Sharing: The Arts and Cultures of First Nations, Inuit and Métis Peoples in Canada.**

Funding for Indigenous music falls into one of three broad categories: national organizations, regional organizations and community organizations. In each of these categories, there are three sub-categories: Indigenous and music-specific funds, music-specific funds and Indigenous-specific funds.

The following table provides a snapshot of the various types of support available to those in the Indigenous music community, including those mentioned by interview respondents, however this is not intended to be a comprehensive list, simply a representative sample of the types of funds available. Other major sources of income for musicians include record sales and performance fees.

[2] A later section of this report will explore interview findings on accessibility, availability, and success in applying to funding agencies and organizations.

Table 2: Available Support for Indigenous Music Community

	National Organizations/Funds	Regional Organizations/Funds	Community Organizations/Funds
Music-specific	• Canada Music Fund • Department of Canadian Heritage (various) • Department of Foreign Affairs and International Trade • Foundation Assisting Canadian Talent on Recordings (FACTOR) • Canada Council for the Arts • Musicaction • Radio Starmaker Fund /.Fonds RadioStar • SOCAN Foundation • RBC Foundation Music Video Production Grants	• Manitoba Film and Music (Showcase funding and other programs) • SODEC • Ontario Creates (Ontario Music Fund) • Amplify BC through Creative BC • SaskMusic • MusicYukon • Alberta Foundation for the Arts music grants • NWT Arts Council	• Toronto Arts Council music program • City of Vancouver (various arts and culture grants) • Winnipeg Arts Council (individual artist and professional development grants)
Music-specific and Indigenous-specific	• Canada Council for the Arts (Creating, Knowing, Sharing). Grants are available for travel, small-scale activities, short and long-term projects. There is also funding for First Nations, Inuit and Métis organizations that 'engage in contemporary, customary or traditional artistic and cultural activities.' • National Arts Centre Music Alive Program • Indigenous Performing Arts Alliance	• Ontario Arts Council Indigenous Arts Fund (slated to close) • Manitoba Arts Council Indigenous 360 Create program • Saskatchewan Arts Board Indigenous/ Métis Art and Artists funds • Conseil des arts et des lettres du Québec Recognition program • Nova Scotia community funding- Mi'kmaq Cultural Activities Program • Manitoba Music (Indigenous Music Development Program and other programs)	
Indigenous-specific (not music-specific)	• Indspire • Dreamcatcher Charitable Foundation • Banff Centre for Arts and Creativity • Indigenous and Northern Affairs Canada • Various grants and programs through private and public foundations	• Nunavut Arts and Crafts Association • First Peoples' Cultural Council in BC • New Relationship Trust in BC • Government of Nunavut	• One of nearly 60 Aboriginal Financial Institutions and Community Futures development corporations across Canada • Individual First Nation, Inuit and Métis funds through band funding, land claims agreements or treaties.

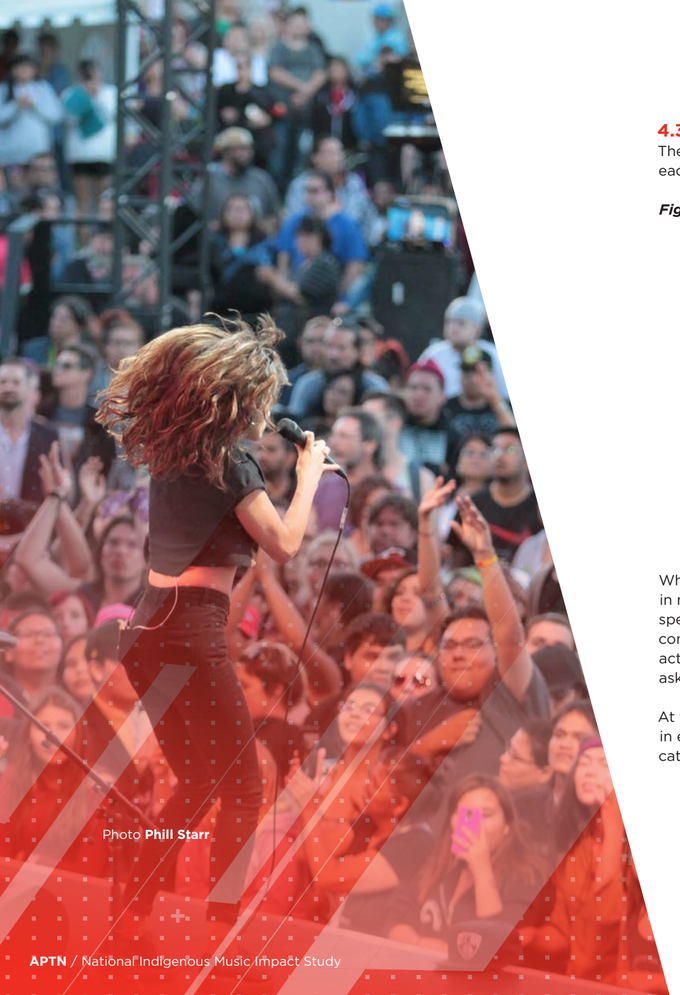
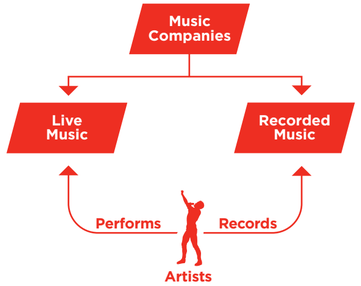


Photo **Phill Starr**

4.3 THE MAINSTREAM MUSIC INDUSTRY

The "music industry" can be viewed as two linked but distinct branches, each with its own value chain.

Figure 1: Music Industry Branches



While both branches of the industry start with the artist, and culminate in music companies, they function in significantly different ways. Any specific company can engage in multiple music-related activities; it is common for a record label to undertake management and/or publishing activities for artists that they sign. In recent years, artists have also been asked to assume a greater role in the business side of their career.

At the same time, there are several different types of music companies in each path. The following table sets out a partial list of music company categories, setting out a basic description of what they do.

Table 3: Music Company Categories

Type	Sub-industry	About
Music Manager/Artist Manager	Live music Recorded music	Handles business relationships for artist Arranges tour logistics for artists
Music Agent/Booking Agent	Live music	Find live music opportunities for artists Liaises with promoters to find performance opportunities
Music Venue	Live music	Ranges from church basements to arenas Music not always the main source of revenue (food, alcohol, other events)
Music Booker	Live music	Works for the venue to find acts to put on stage Often an employee of the venue
Music Promoter	Live music	Arranges and promotes live show for artists or their representatives (i.e. agents) Liaises with local media to market the event Locates venues for artist to play Handles ticketing (with a ticketing platform, such as Ticketmaster)
Music Festival	Live music	Combines the venue, booker, and promoter Tend to be focused on a limited (and often annual) time period (e.g., 2-3 days)
Record Label	Recorded music	Finances the production and marketing of recorded music Signs artists and develops careers
Music Recording/ Mastering Studio	Recorded music	The place where artists actually record music Creates the "master recording"
Music Publisher	Recorded music	Represents songwriters and composers. Seeks to maximize the use of their musical works, and collects and distributes their royalties.
Digital Music Platform	Recorded music	The place where a consumer can access music, including both streaming services (e.g., Spotify, Apple Music, Tidal, Google Play Music) and digital storefronts (e.g., iTunes)
Music Broadcasters	Recorded music	Terrestrial radio broadcasters, satellite radio, and their online equivalents (e.g. Pandora)

Other companies that support the music industry, and depend on the industry for their revenue. Such companies include:

- Music-specific marketing companies (both traditional and social media)
- Music video creators
- Music educators and music schools
- Music media and journalists
- Music technology companies (e.g., developing encoding software or rights management software suites)

4.3.1 MUSIC INDUSTRY VALUE CHAINS

Given that there are two main branches that comprise the larger music industry, the following images illustrate the relationships between the principal actors in each value chain.

> "Music gathers people together and it gathers people of all cultures. That is why I make music. I contribute to educating non-Indigenous people about our culture."

Figure 2: Recorded Music

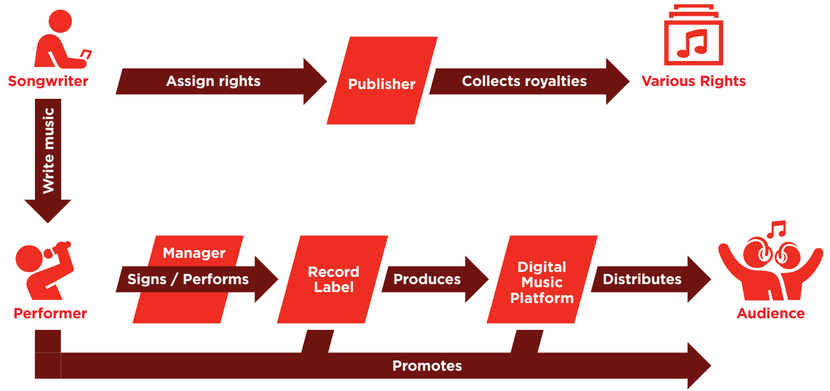


Figure 3: Live Music

4.3.2 THE CANADIAN MUSIC INDUSTRY
4.3.2.1 RECORDING AND PUBLISHING

In Canada, three major multinationals dominate the music industry: Universal Music Canada, Sony Music Entertainment Canada, and Warner Music Canada. There are also hundreds of small to medium enterprises (SME) and independent companies. Twhese companies record music, manage artists, and/or publish recorded works and collect licence fees for the use of music. The recorded music industry also includes studios used to record, mix and/or master musical works.

In 2017, the **record production and integrated record production** and distribution industry group had total operating revenue of $577.2 million, up 28% from 2015. Ontario accounted for 75% of the total operating revenue (Statistics Canada).

Music publishers posted $329.1 million in total operating revenue in 2017. Revenues from royalty and licensing rights amounted to $148.1 million (Statistics Canada).

Services such as **recording, mixing and mastering** generated $139.5 million in total operating revenue in 2017 (Statistics Canada).

In 2016, music publishing represented 2,999 jobs, and sound recording 6,833 jobs (Statistics Canada).

Music publishing contributed $180 million in GDP in 2016. Sound recording contributed $444 million in GDP in 2016 (Statistics Canada).

In 2016, the sound recording industry consisted of 1,824 establishments, with an average revenue of $246,000. There were 599 sound recording studios and 468 music publishers (Statstics Canada).

There were 30,000 professional songwriters in 2014 (House of Commons).

4.3.2.2 LIVE MUSIC

Data on live music/live performances in Canada is not easily gathered. Although Statistics Canada collects industry highlights and financial data through its *Annual Survey of Service Industries: Spectator Sports, Event Promoters, Artists and Related Industries,* it does not report on live music as a distinct category. Culture Satellite Account data provides information on the total value of the arts and cultural industries in Canada, including live performances; however, once again, live music has not been identified as a distinct subdomain. No breakdown by discipline (theatre, music, dance etc.) is provided, and music festivals and live music in non-music venues are not captured. Furthermore, no national study on the nature of live music in Canada has yet been conducted.

These limitations notwithstanding, several provinces have studied the economic impact of live music on the economy. The following highlights are drawn primarily from studies undertaken by Nordicity, one of the consulting companies that prepared this Indigenous Music Impact Study.[3]

In British Columbia (for the Canadian Live Music Association):

- In 2017, BC's live music companies contributed 12,010 FTEs, $619.3M in BC-based labour income, and $815.8M in GDP to the provincial economy.
- Economic impact of live music in BC (2017):

Table 4: Live Music Economic Impact - B.C.

	Direct Impact[4]	Indirect impact	Induced impact	Total impact
Employment (FTEs)	2,340	3,060	1,550	6,950
Labour income ($M)	403.5	137.2	78.7	619.3
GDP ($M)	397.4	243.6	174.8	815.8

[3]These studies are not regularly conducted exercises. Rather, they are conducted (in this case by Nordicity) when commissioned to do so, by the Canadian Live Music Association and Music Canada respectively. [4]Direct impact of music companies comes from salaries and wages paid to employees, as well as the profits companies earn from their operations. This economic activity also has "spin-off" impacts i.e. indirect impacts (the employment and value added by suppliers from which music companies purchase goods and services), and induced impacts (the re-spending of labour income earned from music companies and their suppliers).

- Tourists visiting BC for music-related events contributed a further 2,900 FTEs and $99.1M in BC-based labour income, and $168.7 million in GDP.
- BC festivals attracted over 7.4 million attendees in 2017.
- Nordicity identified 903 companies operating in the live music industry in BC: 44% are festivals, 36% are venues, 15% promoters and 5% managers.

In Ontario (for Music Canada):

- Based on secondary research conducted in association with Music Canada, Nordicity identified 1,240 total companies operating in the live music industry in Ontario.
- In 2013, 558 festivals across the province sold a total of 15.7 million tickets (including free and complimentary tickets), representing 13.7 million unique visitors.
- There were 775 promoters operating in Ontario in 2013. Together, they promoted 81,600 shows, which sold a combined total of 5.4 million tickets.
- Live music companies in Ontario generated $628 million in revenue from live music activities in 2013. Almost 40% of all revenue was derived from ticket sales. Overall, ticket sales revenue from Canadian artists amounted to $75 million in 2013, or around 32% of total ticket sales revenue for live music companies.
- Live music in Ontario generated profits of $144 million in 2013, representing a gross profit margin of 23% of total revenues.

Economic impact of live music companies in Ontario in 2013 (not including tourism impact):

Table 5: Live Music Economic Impact - ON

	Direct Impact	Indirect impact	Induced impact	Total impact
Employment (FTEs)	7,300	2,200	1,000	10,500
Labour income ($M)	152.4	105.3	47.8	305.5
GDP ($M)	296	186.3	100.1	582.5

Note - figures may not sum due to rounding

Economic impact of tourism activities generated by live music in Ontario:

Table 6: Live Music Economic Impact - Tourism ON

	Direct Impact	Indirect impact	Induced impact	Total impact
Employment (FTEs)	6,230	1,720	1,580	9,520
Labour income ($M)	213.6	100.8	90.7	405.1
GDP ($M)	317.7	149.1	142.4	609.1

Note - figures may not sum due to rounding

"I work to bridge contemporary western classical music with electronics through a critical Anishinaabe lens."

"There's a lot of talent but not enough people to facilitate their career to get to the next level. People don't know what they're worth."

4.3.2.3 WAGES

Statistics Canada tracks prevailing wages for all occupations in Canada listed under the National Occupational Categories (NOC). While the following tables do not highlight every region, they provide an idea of low, median and high wages in several provinces. When considering these wages, it is important to remember that many music artists maintain several sources of income, in part due to the unpredictable nature of the music industry's hit-driven model.

Statistics Canada - Prevailing wages - NOC 5133

Table 7: Wages - Musicians and Singers

	Wages ($/year)		
	Low	Median	High
Canada	23,525	39,208	65,340
BC	24,799	52,931	68,045
MB	22,251	39,208	66,516
ON	27,446	39,208	56,009
QC	32,347	43,129	68,006

Statistics Canada - Prevailing Wages – NOC 5132

Table 8: Wages - Conductors, Composers, Arrangers

	Wages ($/year)		
	Low	Median	High
Canada	23,166	36,099	88,017
BC	26,641	34,695	104,642
ON	29,557	39,389	94,180

Photo **Kelly Clark**

artists

5.1 PROFILE

This section of the study includes information gathered through interviews and through the survey[5].

5.1.1 PURPOSE

Interview respondents were asked why they make music, and what they hoped to achieve through their music.

The most common response was simply that they love music. It is how they express themselves; it provides great pleasure and enjoyment and they are compelled to do it. "It's in my soul," said one respondent. "It's passion-driven" said another. "Music is a language that allows me to speak emotions without using words", and "I aspire to reach my own potential."

Others described their own feelings, motivation and hopes for their music.

Making connections. Some are seeking to make an emotional or simply a human connection through their work, to inspire joy and have people resonate with their words and/or the music.

Music is medicine. Some said music is healing and provides an emotional release, an outlet. Comments included "it keeps me grounded and focused", "it is a way to fight our intergenerational trauma."

[5] Some questions were asked in the survey and during interviews; other questions were only asked in the survey or during interviews. Responses from interviews are provided with qualifiers described in the methodology section of this report. Responses from the survey are provided as percentages. The terms 'interview respondent' and "artists surveyed' differentiate the two types of responses in this study.

Sharing culture and educating Canadians. Respondents spoke of their connection to their Indigenous heritage, and the need to share their perspectives about their culture with a wider audience while maintaining traditions (such as throat singing, hand drumming, pow wow singing and drumming). Some felt a responsibility to tell stories and educate people about history, culture and Indigenous realities to make Canadians more aware. "I make music for language and cultural preservation." "I want to inspire people to discover my culture." "I want to honour our ancestors." Jimmy Dick, an influential pow wow singer, was interviewed several years ago, and explained: "I educated myself about the issues and concerns our people struggled with and began to create awareness about them through drumming and singing" (Hoefnagels 210).

"I think music is in my soul...if I couldn't do it, I don't know what I would do."

Inspiring other Indigenous peoples. Some expressed their desire to ensure young people have access to music "to help them during difficult times", to inspire them, and to show them that they can pursue their passion and their musical pursuits. Others hope to inspire Indigenous women to be strong, or to encourage Indigenous people to be proud of who they are.

A platform for messages and education. For some respondents, music is a way to bring about positive changes and share important messages, to express political views, and to discuss issues.

"There are a lot of problems with addiction and poverty in my community and music became my sanctuary to escape it all."

5.1.2 DEMOGRAPHIC PROFILE OF ARTISTS

Using the methodology outlined in Section 3.2, it is estimated that there are approximately 3000 Indigenous music artists practicing across Canada.[6]

56% of interview respondents identified as male, 40% as female and the remainder as non-binary, gender non-conforming. This is nearly identical to the survey responses. Nearly 55% of artists who participated in the survey identified as male, while 37% were female; the remainder identified as two-spirited, non-binary or none of the above.

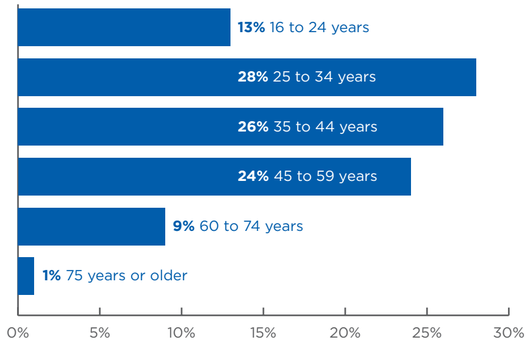
While the small numbers mean that the results are not statistically significant, the survey showed that the North (Yukon, NWT, Nunavut) has the most gender-balanced artist population, with 40% of surveyed artists from the North indicating that they identify as female. In contrast, only 24% of artists from Quebec reported the same.

Nearly 60% of interview respondents identified as First Nations, 14% as Métis, 4% as Inuit and 7% identified more than one Indigenous affiliation. Regarding survey data, First Nations respondents made up 80% of artists, while Métis accounted for 19% and 3% were Inuit (respondents could select more than one category).

[6] This figure is based on a combination of Statistics Canada NOC data (to establish the number of Indigenous persons who have music as their primary occupation) and the NIMIS online survey (to understand the portion of *all* Indigenous musicians that haver music as their primary occupation).

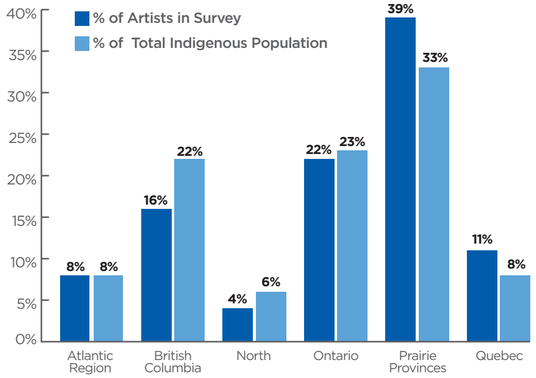
Artists mirror the young Indigenous demographic. More than 40% were under the age of 34, with the largest demographic between the ages of 25 and 34.

Figure 4: Age Categories of Artists



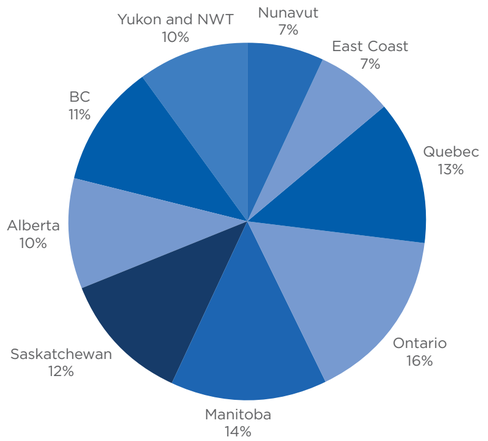
The regional distribution of artists roughly corresponds to the actual distribution of the Canadian Indigenous population in Canada, with the largest proportion of respondents in Ontario and British Columbia and the smallest proportions in Nunavut and Newfoundland and Labrador.

Figure 5: Indigenous Artists as Percentage of Indigenous Population



The regional distribution of interview respondents was more evenly distributed because it was intentional; the study wanted to hear equally from all regions.

Figure 6: Interview Respondent Location[7]



[7] Under Location, the chart shows where respondents undertake their music. It may not reflect where they may have been born or grown up or their home community.

"We have a respect for each other. We are such a small blip on the radar so we must stand together to be recognized in the public."

"For me a big part is showing pride in my identity and connecting with my grassroots."

More than one-third (37%) of artists surveyed indicated that they live in a large urban centre, while one-quarter live on a reserve and four in ten live in medium-sized or small city or community. This is different from the Indigenous population as a whole, which is more urbanized (more than half of all Indigenous people live in urban areas). It is unclear the extent to which the smaller proportion of Indigenous musicians who live in urban areas is due to survey outreach efforts, or to a true difference in place of residence among Indigenous musicians.

Artists from the Atlantic Region are most likely to live in a medium-sized community or city with a population between 30,000 and 500,000, whereas artists from the North are most likely to live in a small community.

The largest portion of artists in the Prairie provinces live in large urban centres, a proportion greater than Ontario, British Columbia and Quebec.

"I work to bridge contemporary western classical music with electronics through a critical Anishinaabe lens."

Table 9: Type of Community Where Indigenous Artists Live

Type of community	Total (n=370)	BC (n=79)	Prairies (n=120)	ON (n=82)	QC (n=29)*	ATL (n=30)*	Territories (N=20)*
A First Nations reserve	23%	18%	13%	28%	45%	47%	10%
A large urban centre (with a population over 500,000)	37%	42%	53%	34%	31%	-	-
A medium-sized community or city (with a population over 30,000 but under 500,000)	19%	19%	19%	15%	7%	37%	15%
A rural or small community (with a population below 30,000)	21%	22%	14%	23%	17%	17%	75%

** Note: use caution when interpreting results due to small sample sizes*

Table 10: Type of Community Where Canadian Artists Live

This finding contrasts with the overall distribution of music artists in Canada. As the following tables illustrate, Canadian musicians live primarily in Ontario and BC, and in larger urban centres.

	Musicians and Singers	% of Canada's total
ON	13,735	41%
BC	5,675	17%

Urban areas (4)	Musicians and Singers - #	%
Cities over 500K	22,230	**66%**
Cities/Towns from 100K to 500K	5,685	17%
Municipalities under 100K	5,545	**17%**

Source: A Statistical Profile of Artists in Canada in 2016

Most artists surveyed live in their home region, although one in six (17%) have moved for their music career. The proportion who have moved to further their career is higher in BC and lower in Eastern Canada.

Table 11: Proportion of Current Residents Who Moved for Music Career

Base: Artists only	Total (n=370)	BC (n=79)	AB (n=41)	SK/MB (n=79)	ON (n=82)	QC (n=29)*	ATL (n=30)*	TERR (n=20)*
Moved for music career	17%	32%	22%	14%	12%	3%	16%	10%
Did not move	83%	68%	78%	86%	88%	97%	84%	90%

Note: total includes n=10 artists who live outside Canada
* Please use caution in interpreting data due to small base sizes

5.1.3 MUSIC PROFILE

A majority (68%) of the artists are solo performers or recording artists, while the remainder (32%) are part of a group or ensemble.

The survey sample has representation from artists with varying amounts of experience. Just over half are mid-career or established artists, while just under half are new or emerging artists.

Some interview respondents were musicians with a registered business number but most were individual musicians who have not registered a business. Of those who have registered business numbers, most are sole proprietors.

"Grassroots politics have always been a reflection of who we are."

5.1.3.1 WORKING WITH MUSIC COMPANIES

Only 9% of artists have used the services of a music agent or booking agent while 23% have used the services of a digital music platform and 22% have worked with music festivals. Full-time artists are more likely to have used the services of the following types of companies.

Table 12: Indigenous Artists' Use of Music Companies

Used services of:	Full-time artists	All artists
Music festival	36%	22%
Music video creators	21%	12%
Music venue	27%	18%
Digital music platform	31%	23%
Music agent/Booking agent	17%	9%

Nearly three quarters of interview respondents said they are independent, unsigned artists. Most prefer to remain independent, but a few would be willing to sign with a record label if they were approached. Some were with a record label, but have since switched to a different label or chose to become independent. The reasons for this varied, but included:

- They felt the record label "took a huge cut";
- For greater 'artistic freedom';
- For more control over their music;
- The benefits of owning their music;
- Failure to find a company they could trust or who shared their vision and direction;
- Reasonable success without a record label;
- "A record label must be as engaged as we are to attract us otherwise they would only take our income away from us."

The majority of interview respondents do not have a manager or management company, for many of the same reasons they do not work with a record label. One respondent spoke of how a management company wanted them to do "token Indian stuff" like perform at a major event wearing a breech cloth. Those who do have managers viewed this as critical to allow them to focus on their music and go to the next level, or because the management/marketing function became too difficult to handle on their own and they needed professional support.

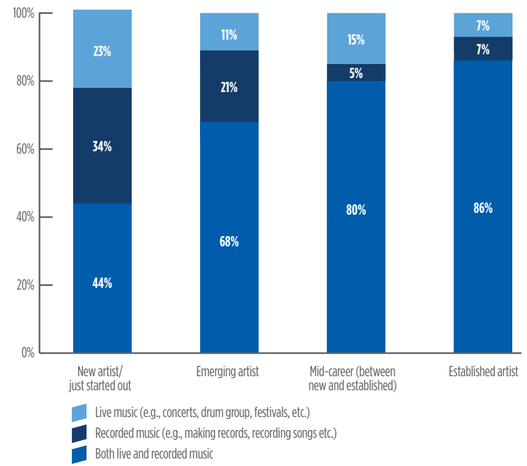
5.1.3.2 RECORDING MUSIC

Nearly all of the musicians interviewed have recorded their music; in most cases their own music, but some supported other musicians' recording sessions. Responses were fairly evenly divided with about a third who self-produced their records, a third that used an Indigenous recording studio or producer and a third that used a non-Indigenous recording studio. A few respondents self-produced their first record and then worked with a recording studio for subsequent records.

Most musicians release both hard copy (CD's) and online versions of their music. A few musicians only released CDs, but this generally referred to music released more than 10 years ago. A few others released their music entirely digitally, online. As one respondent said, "Physical copies are more expensive to make. Physical copies are dying; it's going against the industry."

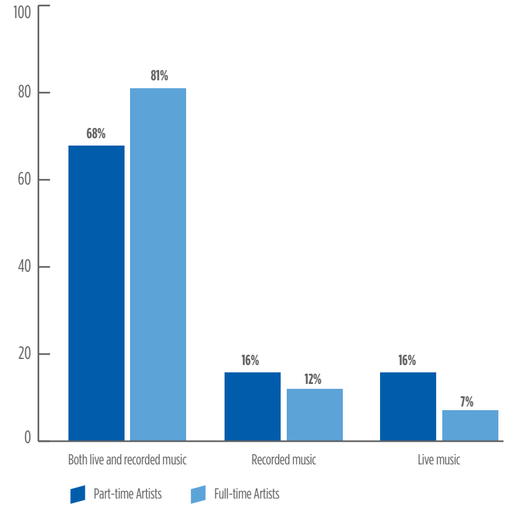
A large majority (71%) of artists surveyed are involved in both live and recorded music. The proportion of artists involved in both live and recorded music increases with experience. A large majority of established artists (86%) are involved in both live and recorded music, compared to less than half (44%) of new artists, who tend to focus solely on either live (23%) or recorded (34%) music.

Figure 7: Type of Music by Career Stage



A larger percentage of full-time artists work in both recorded and live music, compared to the portion of part-time artists. Part-time artists are more likely to work in live music than full-time artists.

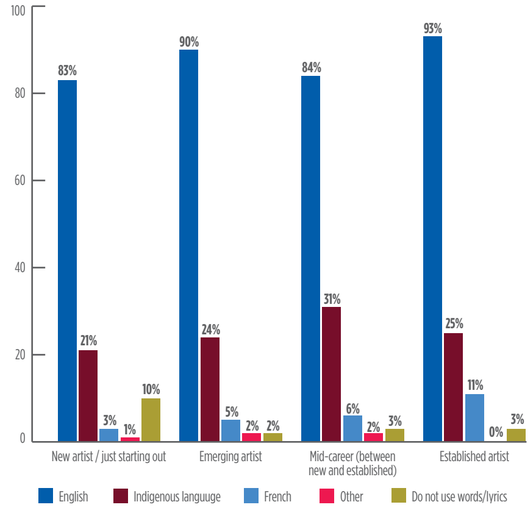
Figure 8: Type of Music By Time Spent on Music



5.1.3.3 LANGUAGE

A large majority (87%) of artists use, perform or record in English; more than a quarter (27%) of artists do so in an Indigenous language. Although this pattern is largely consistent across subgroups, new artists are slightly less likely to use English or French and more likely to perform or record without using words or lyrics.

Figure 9: Language Used in Performance/Recordings by Career Stage



"It is important to keep language alive, hearing vocables, traditional pow wow songs; there is something inherently putting us in touch with the ancestors, it brings us home."

"It is important for us to sing in our language because we can build a sense of pride in our people and for the next generation of musicians. We prove that our culture is alive and we make our ancestors dance!"

A wide variety of Indigenous languages were cited by survey respondents when asked about the Indigenous language they use in performances and/or recordings. The most commonly used Indigenous languages for this purpose are Cree (21%), Ojibwe/Anishinaabe (17%) Mi'kmaq (11%), Inuktitut (7%), Innu (7%) and Mohawk (5%). Other Indigenous languages were mentioned by a few participants, as illustrated below.

Figure 10: Indigenous Languages Represented in Performance/Recordings

Nearly half of the interview respondents said they perform and sing songs in an Indigenous language. The lower rate of Indigenous language use suggested by survey results may reflect the survey's wider audience and the fact that an effort was made to seek out some interview respondents who perform/sing in an Indigenous language. It may also be that the survey itself was not available in any Indigenous language.

Some musicians who play instruments indicated that they introduce themselves and speak in their language when explaining songs. Some music incorporates vocables or other traditional Indigenous music sounds such as pow wow songs and drumming and throat singing.

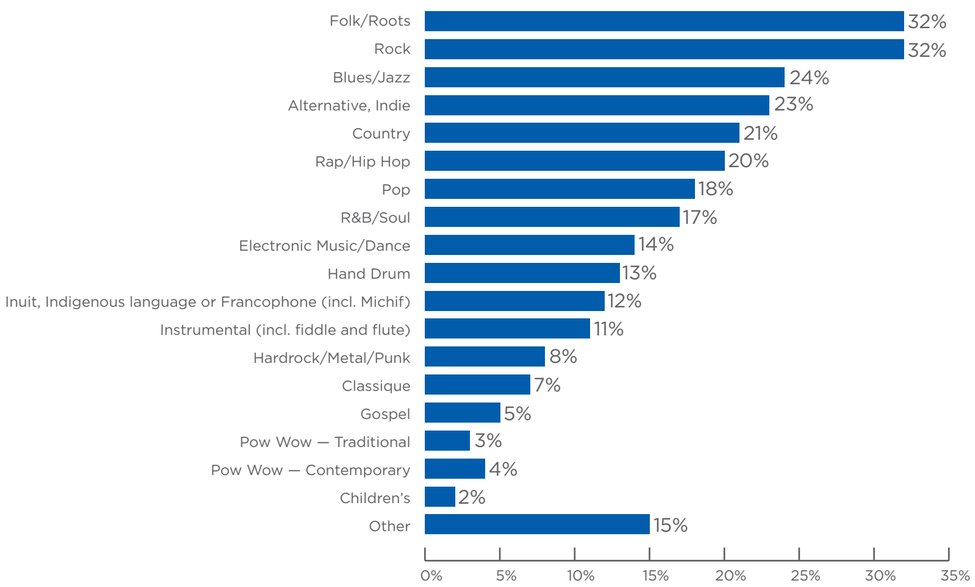
Many of the interview respondents who incorporate Indigenous language into their music want to "keep it alive" and "inspire youth to get back into it." Indigenous languages are "full of our culture and teachings", and must be carried into the future and revitalized. One respondent said that it was once illegal to sing or practice culture, so now it is important to take pride in the language and culture and share it with others. "We can build a sense of pride for our people and for the next generation of musicians."

Some musicians regret not being able to speak their Indigenous language. In most cases this was because a parent or grandparent had attended residential school, were forbidden to speak their language, lost their fluency, and were unable to pass it down. Others said that while they do not currently have any songs in Indigenous language, they would be open to, or are planning on, incorporating their language into future works.

5.1.3.4 GENRE

The two most common musical genres among the artists who participated in the survey are Folk/Roots (32%) and Rock (32%). A wide variety of other genres were also mentioned.

Figure 11: Musical Genres



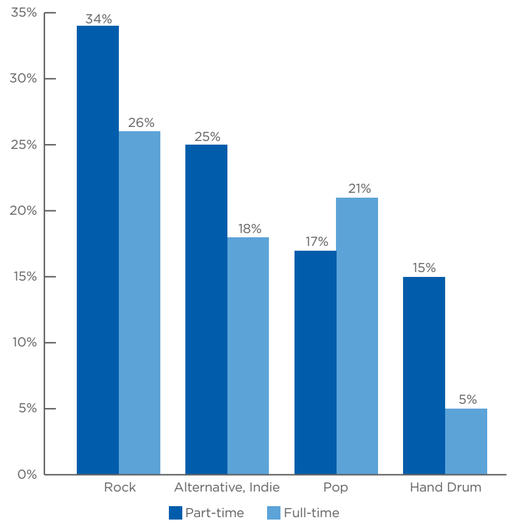
The table below shows the three (or four, if a tie exists) most common genres of music for Indigenous artists in each region. Rap/Hip-hop, R&B/Soul, Hand Drum and Inuit, Indigenous language or Francophone are among the top genres in only one region.

Table 13: Most Common Genres of Music by Region

	BC	Prairies	ON	QC	ATL	North
Folk/roots	•	•	•	•	•	
Rock	•	•	•	•	•	•
Blues/jazz			•	•		
Alternative indie	•					
Country		•				•
Rap/Hip-hop					•	
R&B/Soul	•					
Hand Drum						•
Inuit, Indigenous language or Francophone				•		

Full-time artists work in the same genres as part-time artists, with the most significant differences between the two groups shown below.

Figure 12: Genres Among Part-time and Full-time Artists

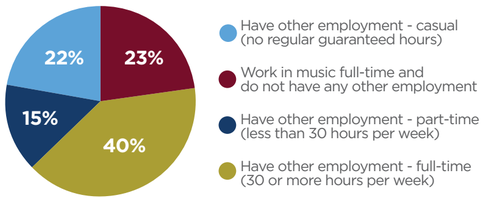


Part-time artists are more likely than full-time artists to work in Rock, Alternative and Hand Drum genres. Similarly, full-time artists are more likely to work in Pop than part-time artists.

5.1.4 TIME SPENT IN MUSIC

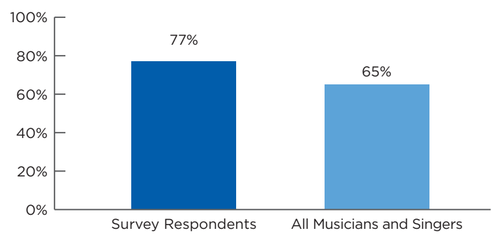
Less than a quarter (23%) of artists work in music full-time. Most have other work; 40% of artists reported working full-time work more than 30 hours a week, in addition to music-related work. Indigenous artists in Ontario are the most likely to work on their music full-time (32%); the distribution of full-time versus part-time artists is similar by location (e.g., reserves vs. urban vs. medium or small population centres).

Figure 13: Time spent in music as employment



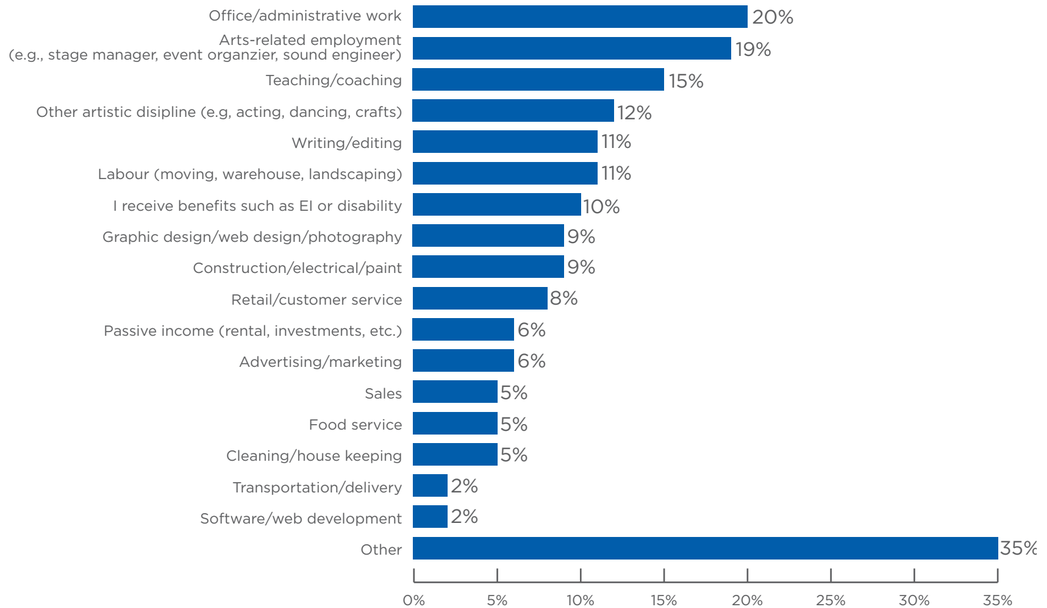
Compared to the typical Canadian artist, Indigenous artists are somewhat more likely to work on their music part time:

Figure 14: Percent who work on their music part time



Artists who don't work in music full-time work in a variety of industries; interestingly, more than half (51%) of them work in creative occupations.

Figure 15: Other Non-Music-Related Work (2018)



"You can always use better access to professional development; more national organizations should bring educational sessions to smaller communities. Or more funding programs to send people to professional development sessions."

More than half (55%) of artists spend between 10 and 30 hours per week on music-related activities; another one in ten (13%) spends more than 30 hours per week. The proportion who spend more than 10 hours per week is highest among established artists (81%), followed by emerging artists (74%), and relatively lower among mid-career (64%) and new (54%) artists.

There was no consistency among interview respondents regarding the amount of time they spend on music. Some work at music full-time, between 40 and 60 hours a week. Others are currently taking a break from music, and do not dedicate much or any time to it. Some spend a few hours per day or week on other full-time jobs or contracts. Some practice every day; some work in concentrated blocks when producing or touring. Others consider music a seasonal occupation (for example, some travel the pow wow trail or rodeo circuit in the summer and have a full-time job during the fall and winter).

5.1.5 TRAINING AND PROFESSIONAL DEVELOPMENT

Indigenous artists often receive two types of 'training'; this includes skill development in music itself and also cultural teachings which places their work in their own cultural context.

When it comes to their music, a large majority (82%) of artists surveyed are self-taught. Many also learned from peers (52%) or family members (32%). Only 16% of artists reported receiving formal music education at a music school.

The majority of interview respondents also said they were self-taught, and 'learn as they go' through hard work, persistence and 'practice, practice, practice.' They turn to books, magazines, videos, or YouTube to learn particular skills.

Interview respondents who had received instruction or formal development listed a number of sources. These included degrees and diplomas in music or music industry-related programs (music composition, vocal performance, piano pedagogy, sound technician, music business, arts and culture management, professional artists training, private music lessons). Other had studied in relevant non-music areas (theatre, journalism, marketing, business development, teaching, counselling, media, international business, TV production, entrepreneurship).

Other sources of instruction or development included online courses and tutorials.

Some described music lessons (piano, other instruments, voice) as a child as the beginning of their music career; others identified traditional and cultural teachings as foundational to their education and decision to pursue music.

Many musicians highlighted the importance of mentorship in their professional and artistic development. These mentors include family members, other Indigenous and non-Indigenous musicians, managers, technicians, or publicists.

Some musicians have taken courses, attended workshops and conferences, and participated in retreats and residencies to improve their skills, network with others and connect and collaborate. There was agreement there must be more of these events, and in different regions. A few of these opportunities mentioned include the AMP Camp, John Arcand fiddle camp, workshops at events such as Canadian Music Week, Canadian Country Music Awards, and workshops offered by Manitoba Music. A number of music industry-related courses, degrees and diplomas are available, but many are only offered in one location which makes it difficult for musicians in rural and remote regions. Some examples are the music management program available at Fanshawe College in London, Ontario and the Harris Institute for the Arts and Trebas Institute, both in Toronto.

Challenges associated with professional or artistic development included general lack of opportunities; even fewer opportunities in small or rural/remote communities; cost of travel to professional development events; difficulty accessing online courses and Internet videos due to low bandwidth; isolation; and not meeting grant or application criteria.

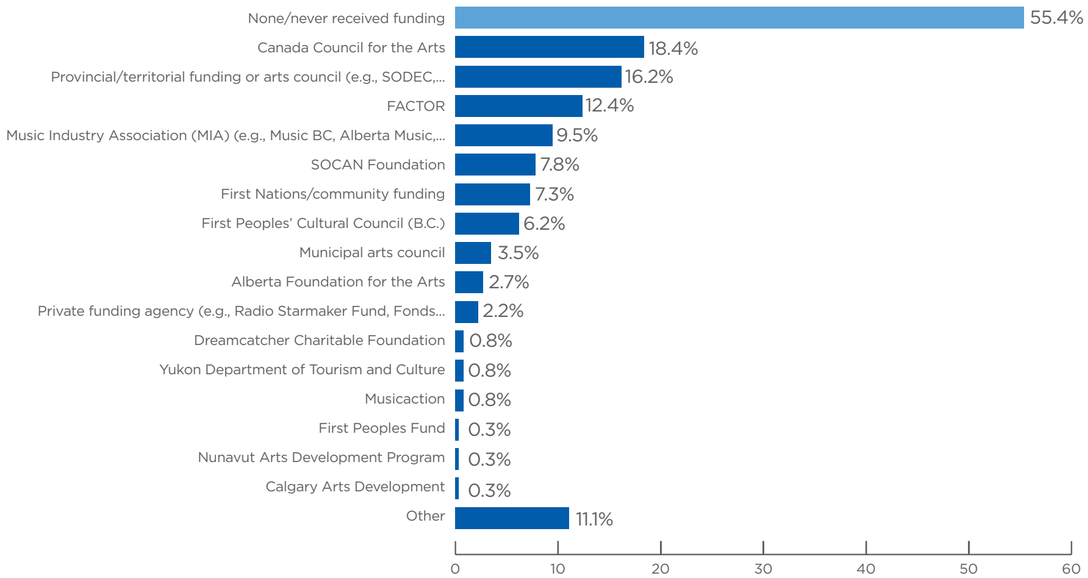
More than half (58%) of surveyed artists are self-taught in the business of music, and almost half (48%) of them also learn about the business from their peers. Only 9% of artists reported learning about the business of music in college, university, or music school.

"I get more value from touring and working with other people on different projects. Can't go to school for that."

5.1.6 FUNDING AND REMUNERATION FOR MUSIC

More than four in ten (45%) artists have received funding for some aspect of their music career, but the majority (55%) have not. The most common sources of funding reported are Canada Council for the Arts (18%), provincial/territorial funding (16%) and FACTOR (12%).

Figure 16: Funding



Full-time artists are more likely than part-time artists to have accessed a variety of funding sources:

Table 14: Funding Sources by Time Spent on Music

Funding	Full-time artists (n=84)	Part-time artists (n=286)
None/never received funding	52%	56%
Canada Council for the Arts	24%	17%
FACTOR	21%	10%
Provincial/territorial funding agency or arts council (e.g., SODEC, Creative BC, OntarioCreates)	20%	15%
SOCAN Foundation	16%	6%
Music Industry Association (MIA) (e.g., Music BC, Alberta Music, Manitoba Music, MusicNL)	13%	8%
Municipal arts council	5%	3%
First Peoples' Cultural Council (B.C.)	5%	7%
First Nations/ community funding	5%	8%

"For some, music is a form of therapy; for others it's a form of income."

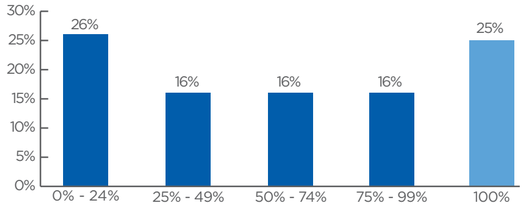
During interviews, many musicians mentioned grants as a key source of income. In addition to the grants listed in the table above, musicians also mentioned:

- Indigenous business development loans and grants
- First Peoples' Cultural Centre grants
- Federal government (Canadian Heritage Arts, Canadian Cultural Spaces, Indigenous and Northern Affairs Canada Brighter Futures)
- Local organizations (Edmonton Arts Council, Winnipeg Arts Council, City of Ottawa, Toronto Arts Council)
- Private foundations
- APTN First Tracks

5.1.7 INCOME FROM MUSIC

A quarter of artists surveyed reported earning all of their income (100%) from music. On average, about 53% of all income is earned from music-related activities.

Figure 17: Percentage of Income from Music



Nearly half of the interview respondents said that all or most of their income is derived from music. A few said about half of their income comes from music; for about a quarter of the interview respondents, music income makes up 25% or less of their total income. The rest did not quantify their income, but said 'some', 'I could never live off my music', not much', or 'I don't know.'

Many musicians have a full-time job or contracts, outside of music, as their main source of income.

"I'm mostly self-taught and have taken the bumps and bruises that come with that. Learning the hard way."

Artists surveyed reported various sources of income. They rely on live music and touring (27% of music income), recorded music sales (15%) and neighbouring rights revenue (15%).

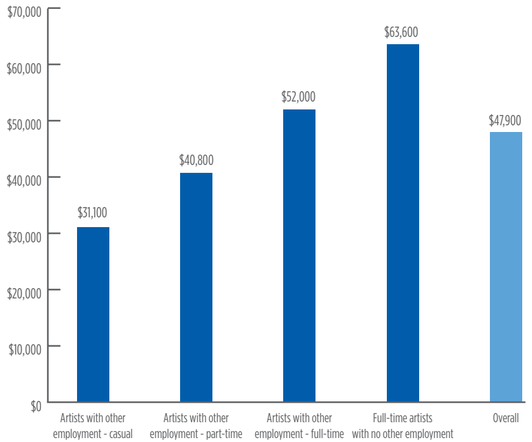
All interview respondents said they are almost always paid for their work, though sometimes this is in non-monetary ways. In addition to the sources mentioned by survey respondents, these are other income generators:

- Fees for collaborating with other musicians
- Grants
- Loans
- Teaching music
- Percentage of merchandise sales
- Dividends and salaries
- Commission (for managers and others who make a percentage of income brought in by musicians they represent)
- Honorarium and fees to present/speak at conferences and events

5.1.7.1 FULL-TIME MUSICIANS AND INCOME

Further analysis of musicians who make up the 23% of artists who work full-time in music shows that Indigenous artists who spend full time hours on music have higher annual income than those who work at music part time and have other employment.

Figure 18: Annual income



Here is a breakdown of the sources of income earned by full-time artists.

Table 15: Sources of Income for Full-Time Artists

Income Source	Average annual income
Live Music/Touring income	$15,076
Public funding/grants	$7,803
Music publishing revenue (e.g., composing, sync)	$7,273
Neighbouring rights revenue (e.g. from Sound Exchange)	$7,121
Recorded music sales	$6,894
Other income from music	$6,667
Merchandising revenue	$3,636
Non-music income	$9,167
Total income (full time artists)	**$63,600**

The following table shows the average salaries for all artists, including those who work only part-time on their music careers.

Table 16: Averages for Annual Income (Full and Part Time Artists)

Jurisdiction	Average annual income
All Canada	**$47,200**
British Columbia	$45,100
Prairie Provinces	$48,300
Ontario	$50,200
Quebec	$42,000
Atlantic region	$42,400
Territories	$51,700

For some interview respondents, costs are higher than income; this can be due to inadequate pay, costs associated with travel or accommodation, or the purchase and maintenance of instruments and equipment.

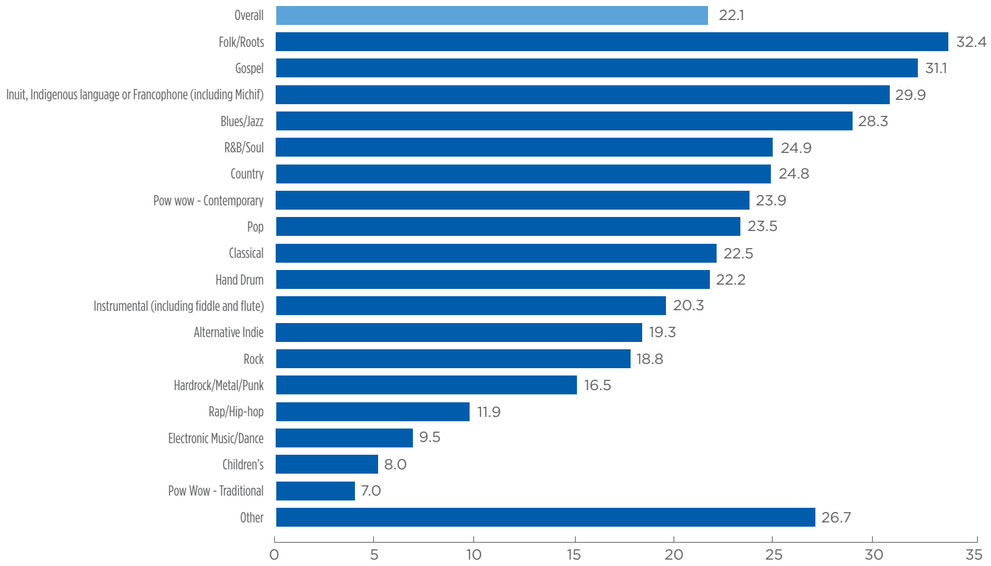
"I grew up around art and artists all my young life. I was exposed to cultural teachings and to the commitment of strong Indigenous public figures."

5.2 OUTPUTS

5.2.1 LIVE PERFORMANCES

On average, artists performed at 23 live events/shows over the last 12 months. Artists performing in some music genres had more shows than others – for example, Folk/Roots and Blues/Jazz artists performed at more shows than Rap/Hip-hop and Electronic Music artists.

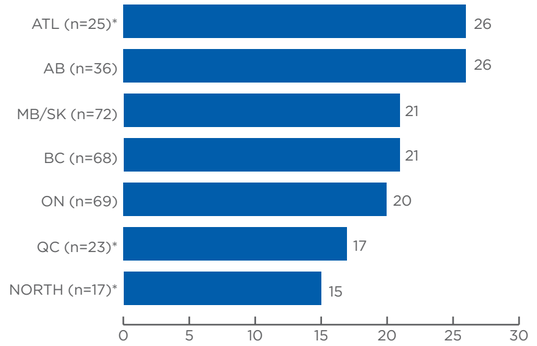
Figure 19: Average /Number of Live Events/Shows by Genre*



*for genres reported by 30 or more artists

The chart below shows the average number of shows artists performed at by their home province or territory. The average number of shows ranges from a high of 26 per year in Alberta and the Atlantic provinces to a low of 17 in Quebec and 15 in the North.

Figure 20: Average Number of Shows by Home Region



** Please use caution when interpreting data due to small base sizes*

More than one-third (35%) of artists indicated that their fans are located within their province or territory. More than one-fifth (21%) of artists reported having fans across Canada and 16% of artists indicated that most of their fans are located across the globe.

5.2.2 TOURING

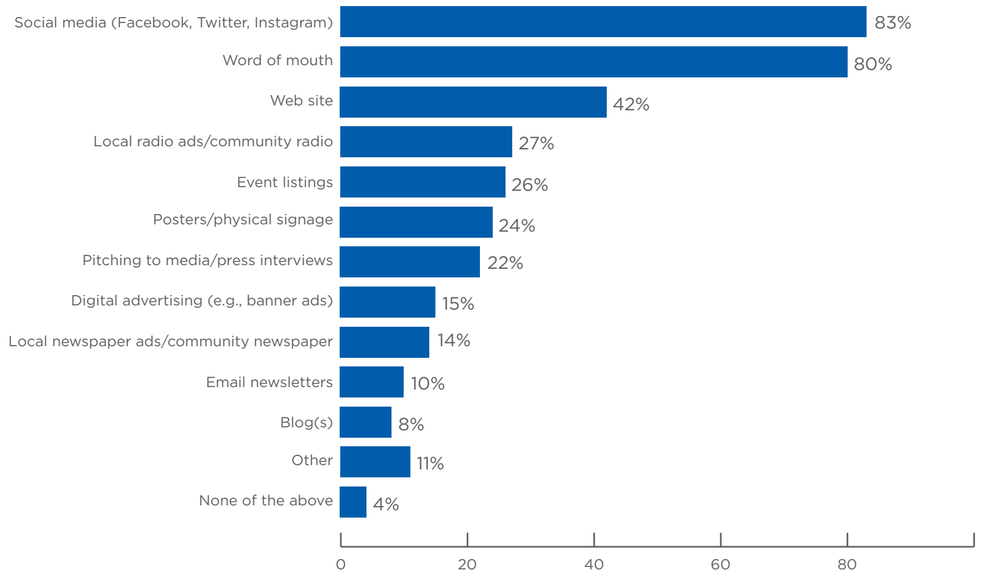
Many musicians interviewed cited their own community or region as the place they started touring as musicians. Some tour throughout a particular region (northern Saskatchewan or Atlantic Canada, for example); some tour to First Nations across the country; others tour through particular circuits relevant to their genre of music (the pow wow trail, the rodeo circuit, or folk festivals) or to the type of venue (the casino circuit). A few musicians have or are currently touring outside Canada, including the United States and Europe. A list of all markets, showcases, festivals and events cited by musicians is included as Appendix F.

Touring musicians identified various funds to assist with touring; those in northern or remote regions, however, said the funds are often not adequate, and do not take into consideration the real costs of getting into and out of remote and northern communities, hamlets and First Nations.

5.2.3 PROMOTION

Most artists surveyed use social media (83%) and word-of-mouth (80%) to promote their work. These media are much more widely utilized that more "traditional" (and often paid) marketing tools such as radio or newspaper ads, event listings or posters. Only a minority (42%) have a web site that is used to promote their music.

Figure 21: Sources of Promotion



Full-time artists were more likely than all artists to use Pitching to media / press interviews and Posters/physical signage as methods of promotion.

Table 17: Types of Promotion by Time Spent on Music

Promotion method	Full-time artists	All artists
Pitching to media / press interviews	35%	22%
Posters/physical signage	40%	24%

Interview respondents echoed the importance of word of mouth and social media for promotion. They cited Facebook, YouTube and Twitter as critical (and sometimes sole) avenues for self-promotion and marketing. Many respondents said they have a web site, but get more attention through social media. Some indicated that their performances and attendance at events (festivals, pow wows) are the main way they promote themselves. "Just getting out there and playing, that's number one."

5.2.4 SONGS AND ALBUMS[8]

The Indigenous artists included in the survey have released an estimated total of 50,500 albums and 22,500 individual songs (not in albums).[9]

For 98% of the albums, artists own the master rights and have not signed a record deal. Artists also own 63% of individual songs released.

Audiences can access music by Indigenous artists through various media. The most common mentioned by interview respondents were online streaming services (Spotify, iTunes, Amazon music, Sound Cloud, bandcamp); live performances; YouTube; CD's; social media; radio; and workshop/panel presentations.

The survey data for Indigenous recording artists yielded a number of interesting statistics on albums and songs sold, and number of plays:

- Estimated total number of albums sold in 2018 = 222,000
  - Approximately 23% of recording artists sold at least one album in 2018. The estimated total number of albums sold is dominated by a small number of higher-volume artists (four respondents estimate they sold 500 or more albums in 2018).
  - While no direct comparison is possible to the wider Canadian music community, the top 300 Canadian-born artists combined to sell approximately 1.6 million albums in 2017.[10]
- Estimated total number of songs sold = 71,300
  - 23% of recording artists sold at least one song (not part of an album) in 2018; again, the total number of songs sold is dominated by a small number of higher-volume artists (three respondents estimate they sold 100 or more songs in 2018).
- Estimated total number of plays across all digital platforms = 8,922,000
  - Half (54%) of recording artists were able to estimate how many plays their music received in 2018. On average, they report almost 3,000 plays across all digital platforms.

Interview respondents listed multiple nominations and awards for their work in the Indigenous music community. For a complete list of the awards and categories mentioned, see Appendix F.

[8] These statistics are not weighted. The totals are based on a gross-up of survey responses to the artist universe. Averages reported in the survey were multiplied by the total number of Indigenous artists in Canada to calculate total figures.

[9] The survey questionnaire did not define what was to be considered as an "albums", as there are a variety of interpretations. Accordingly, readers should use caution in comparing these figures with other data."

[10] Source: https://www.ajournalofmusicalthings.com/still-year-end-canadian-music-stats-2017/

"I think as Indigenous people we want to make money, but a lot of times we're doing these types of things for our own people and to have that sense of community or mentoring the next generation."

5.2.5 MUSIC RIGHTS

Six in ten (59%) artists have at least one song registered with a music rights organization, the most common – by a large margin - being SOCAN (51%). The following organizations were also mentioned: Sound Exchange (14%); MROC (6%); ACTRA-RACS (6%); CMRRA (4%); Connect (4%); SOPROQ (3%); SODRAC (2%); Re:Sound (2%) and ARTISTI (1%).

As one might expect, full-time artists were more likely than all artists to be registered with SOCAN (58% vs 51% overall), and Sound Exchange (24% vs 14% overall).

Most musicians interviewed said they are registered with SOCAN, and many were very positive about their experience with the music rights collective; a few found, however, found the registration cumbersome. A few noted that their music is played on First Nations community radio stations, many of which do not pay SOCAN fees; musicians do not receive royalties for those broadcasts. A few musicians are registered with Sound Exchange, the Musicians' Rights Organization Canada (MROC), and/or ACTRA. Individual respondents mentioned other organizations: North American Songwriters Association, Canadian Music Reproduction Association, Society for reproduction rights of authors, composers and publishers in Canada (SODRAC), and the Québec Collective Society for the Rights of Makers of Sound and Video Recordings (SOPROQ). Some not registered with any collective were not aware of the benefits of registration, or of how to sign up.

Most musicians interviewed are not represented by a publisher. One respondent had a publisher, but reverted to self-publishing because "I lost too much control of how my music was being used." Another musician was not aware of how that relationship works. "I haven't had the time and don't know where to start. In my genre, I'm not sure how to find the right kind of representation."

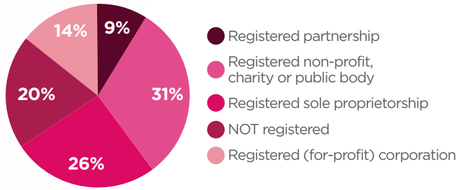
Many musicians described how their music has been licensed for film and television, including documentaries, TV series, and movies. CBC and APTN were most often mentioned as networks that show programs featuring their music.

companies

6.1 PROFILE
6.1.1 COMPANY OWNERSHIP AND MANAGEMENT

The company representatives who completed the survey represent a variety of business structures. Looking at a breakdown of survey respondents, the most common are registered non-profits (31%), followed by registered sole proprietorships (26%). Only a minority (20%) are not registered.

Figure 22: Ownership Structure



These companies are primarily Indigenous-owned (65%). More than half of the companies (58%) reported having at least one owner that identifies as female.

Most of the companies are considered small, with seven employees on average.

Music companies report that, on average, almost three-quarters of their employees identify as Indigenous, and more than two-thirds identify as women.

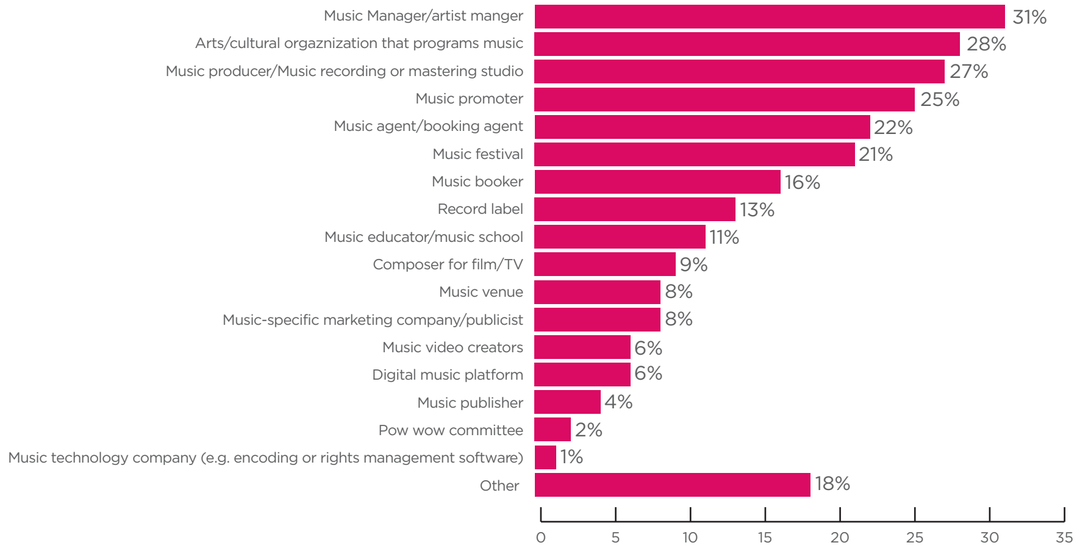
Half (48%) of companies are based in the West, while one-quarter (27%) are located in Ontario.

Most companies are located in a large urban centre (43%) or a mid-size city (21%). 17% of companies are located on a reserve.

6.1.2 TYPE OF ORGANIZATION

A wide variety of business types[11] are represented in the sample (and many fit more than one category), but the most common are music/artist management (31%), arts/cultural organizations that program music (28%), music producers (27%) and music promoters (25%).

Figure 23: Type of Organization



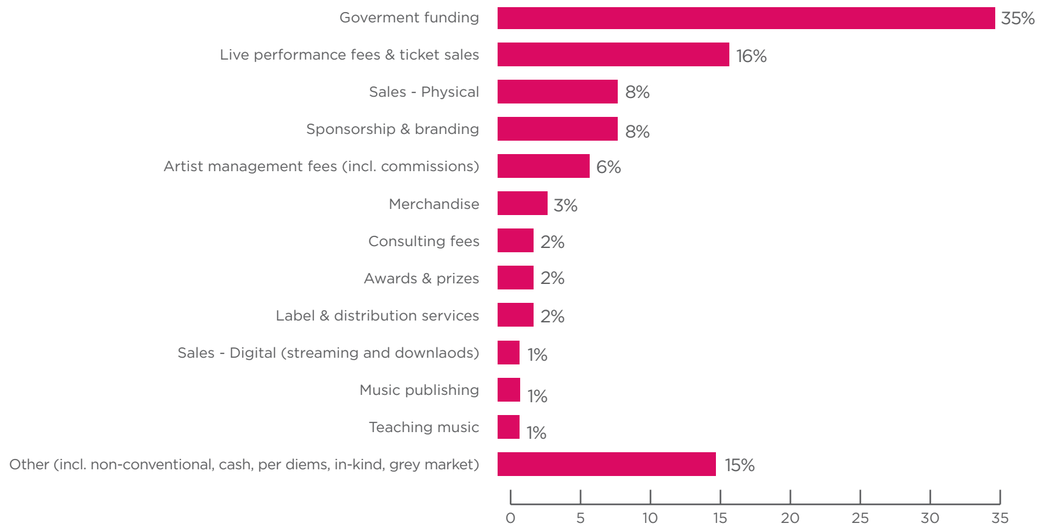
[11] It is important to note here and in general that this study includes companies that are active in the Indigenous music community. These include companies that work with non-Indigenous artists, i.e, the study is not restricted to Indigenous business owners, or business owners that exclusively work with Indigenous artists.

Half (49%) of companies operate in both live and recorded music, with another third (34%) working in live music; very few (14%) work in recorded music only. Almost half (48%) of companies operate in the Folk/Roots genre. Other common genres include Rap/Hip-hop (38% of companies), Blues/Jazz (37% of companies) and Pop (36% of companies).

6.1.3 SOURCES OF INCOME[12]

Surveyed company representatives reported various sources of revenue. The industry relies most widely on government funding (35%). Other sources of revenue include ticketing revenue (16%), physical sales, sponsorships and artist management fees.

Figure 24: Revenue by Source

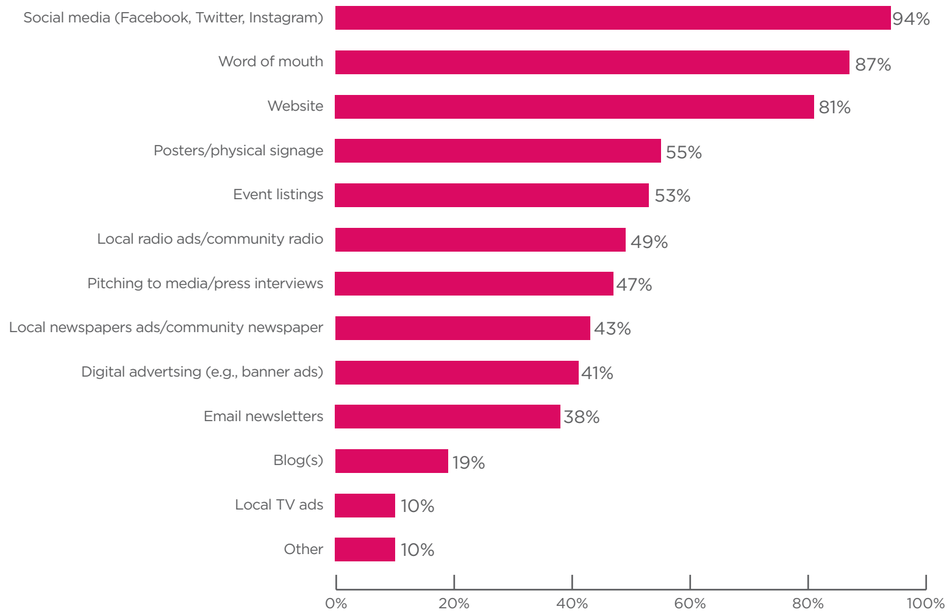


[12] Further details and data regarding income is provided in the economic analysis section of this study.

6.1.4 PROMOTION

Almost all (94%) companies use social media to promote their activities. Similar to artists, companies also rely on word-of-mouth for promotion (87%). Most (81%), but not all, use a web site for promotion.

Figure 25: Promotion Platforms



6.2 OUTPUTS (AVERAGES)

6.2.1 WORKING WITH INDIGENOUS ARTISTS

On average, companies worked with 43 musicians last year, of whom 45% were Indigenous musicians.

Artist managers and booking agents managed four artists on average last year, two of whom were Indigenous.

On average, 47% of companies' activities relate to developing Indigenous music.

Companies interviewed for this study provided additional context.

There are very few Indigenous people working in the music industry aside from musicians. The majority of respondents who identified as managers, promoters, publishers were mostly non-Indigenous.

Some music company interview respondents noticed the difference between the Indigenous musicians they produce, represent and/or promote and the non-Indigenous musicians. As one respondent said, "more Indigenous artists are in touch with their communities and identify with their culture; more so than non-Indigenous artists." The sense of connection is unique, and sets them apart; this can be a selling point, but also a limitation. As one respondent said, they still get requests for the Indigenous artists they represent to appear as the 'token Indian.' Another respondent noticed the internal battle that some of the Indigenous artists face when incorporating Indigenous sounds, elements or languages in their work. Some are proud of their heritage but 'afraid of being typecast.' As one Indigenous publicist said, "we shouldn't have to commercialize our culture." A few respondents pointed to artists who are not considered for the JUNO Awards Indigenous Album of the Year because 'they were not native enough.'

Some respondents said more work needs to be done in the music industry to understand and increase Indigenous cultural awareness. One respondent said there is still a lot of cultural insensitivity regarding Indigenous artists. It takes effort and research to become culturally aware and avoid offense. Another said managers and promoters must listen to the needs of Indigenous artists: "we are helping them to get their message across, not what we want of them but who they are." Another respondent receives requests for an Indigenous artist to appear at a festival or program; but if that artist is not available, the festival asks for someone else, "as if one of my Indigenous clients is easily exchanged for another." There is no such thing as 'Indigenous music', as one respondent said. "Indigenous music is not a genre but some people think it is. I don't see my Indigenous clients as 'world music' clients either, it's a phrase I dislike. They are who they are. Their artistry is their artistry."

Some Indigenous artists are not connected or aware of how the music industry works. For example, one industry association respondent said, "The majority of Indigenous artists in [this province] don't engage in the music industry associations, yet this could be such a great marketing tool for them."

Companies that worked with or represented both Indigenous and non-Indigenous artists noted that Indigenous artists often require more support than non-Indigenous artists. Some company respondents said that non-Indigenous artists usually have the means to fund their projects themselves, but this is not the case with most Indigenous artists. Non-Indigenous musicians can network, perform and promote themselves at conferences and events that Indigenous artists are not invited to or have no means to participate in. Many Indigenous musicians do not get mainstream radio coverage. As one manager said, "Non-Indigenous artists have advantages because there is an organizational structure that exists" to support them.

A few music industry respondents concurred with Indigenous musicians that the Indigenous music community is close and tight-knit. While this is seen as a positive thing by Indigenous musicians, one music business interview respondent pointed out that "stepping out of their comfort zone can be very challenging personally, financially and emotionally" and some choose to stay close to home, which can be restricting. Other respondents referred to criticism aimed at Indigenous artists from Indigenous communities who react negatively to their music, particularly on social media, and especially if they incorporate Indigenous language or traditional sounds with contemporary sounds.

Some interview respondents in Québec pointed out the challenges inherent in representing and supporting Indigenous artists in the province. The "Indigenous music industry of Québec is less structured than the Indigenous music industry in Canada". English-speaking Indigenous musicians have more opportunities than those who are French-speaking and Indigenous because they are seen as more 'exportable'.

Respondents who work in media and venues emphasized the importance of profiling Indigenous music on mainstream radio and featuring Indigenous artists on mainstream stages, headlining festivals and events as opposed to "niche" appearances off-to-the-side or at Indigenous-only events.

6.2.2 RECORDING AND LIVE OUTPUT

On average, record labels that responded to the survey sold 101 albums and 24 individual songs recorded by Indigenous artists last year.[13]

Record labels, music producers or recording studios that responded to the survey recorded four Indigenous artists on average last year; or an average of 161 hours.

Record labels received almost 700 plays on average last year for their music (all music including music by Indigenous artists) across all digital platforms.

Music/Booking agents, venues, bookers and promoter companies booked 32 live performances on average last year, two-thirds of which (67%) were booked for Indigenous musicians.

6.2.3 ATTENDANCE

On average, companies[14] reported that over 11,000 visitors attended all of their shows in the last 12 months that featured Indigenous musicians. Nearly 70% of visitors came from within a 15-minute drive to a live performance. Because there is no available data on the number of events that featured Indigenous artists last year, it is not possible to estimate the total number of attendees across all events.

"We want to raise the profile of Indigenous music in Canada and we see results. We use every possible way via social media, public representations, events, shows and modern technology to outreach and create a strong collaboration between Indigenous artists and the music industry."

[13] Note that no non-Canadian labels participated in this survey (e.g. Sony, Warner, UMC) and some Indigenous artists are signed to those labels so the data reflects this.
[14] Companies of types venues, festivals and pow wow committees.

economic impact

7 ECONOMIC IMPACT

7.1 ECONOMIC IMPACT SUMMARY

The economic impact of the Indigenous music community in Canada – including both music artists and companies involved in Indigenous music – can be expressed in terms of the community's contribution to Canada's GDP and the number of full-time-equivalent (FTE) jobs the community supports.[15] The impacts are summarized in the table below.

Table 18: Summary of Economic Impact of the Indigenous Music Community

Total Impact	Direct	Total
GDP Impact	$63.6 M	$77.9 M
Employment (FTEs)	2,910	3,060
Tax Impact	$25.1 M	$30.7 M

Source: Nordicity MyEIA Model, Statistics Canada, federal and provincial government accounts.

The sections that follow detail the financial indicators for artists and companies that were used in the impact estimations, and the direct, spin-off and total economic impacts.

7.2 SOURCES OF ECONOMIC IMPACT

The main source of direct economic impact in any economy is money paid to or generated by individuals. The direct impact contributed by *companies* comes from salaries and wages paid to their employees, as well as the profits they earn from their operations (which can be understood as income for the companies' owners).[16] On the other hand, *artists* contribute to the economy by earning income from their music activities.

In addition to the direct impact, economic activity also has "spin-off" impacts, which represent the ripple effects that an industry (or community) has on the broader economy. These impacts include *indirect* impacts (the employment and value added by suppliers from which music companies purchase goods and services), and *induced* impacts (the re-spending of labour income earned from music companies and their suppliers).

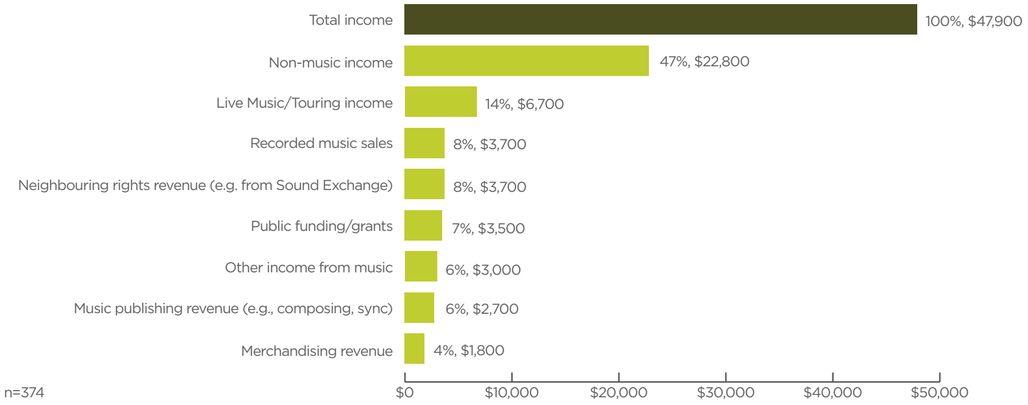
7.2.1 ARTIST INCOME

Annually, artists earn an average of $47,200 from all sources. However, their income is from a variety of sources that may or may not be music-related. Indeed, as Figure 34 shows, almost half (47%) of income earned by Indigenous music artists derives from non-music work. Music-related income accounted for 45%, and public funding and grants made up 7%[17].

Of this total income, artists reported that 13% (or $6,100 on average) was tax-exempt.

It is estimated that artists in the Indigenous music community in Canada earned an estimated $57.2 million in personal income from their music activities.

Figure 26: Average income earned by Indigenous artists by source



[15] Full-time equivalent is a measure of employment that can mean, for example, that three part-time employees each working a third of a year make up 1 FTE.
[16] Given the focus of the study, only expenditure and income derived from Indigenous music was considered relevant to this study. [17] Qualitative findings suggest that applying for funding and grants is common and that artists were aware of multiple organizations they could apply to. This 7% indicates that they do get funding. Important to note here that this is an average and by its very nature indicates that some artists get much more in funding and some get much less than 8%.

7.2.2 COMPANY SPENDING

Companies in the Indigenous music community reported that almost half (47%) of their activities last year were related to developing Indigenous music. These activities incurred $17.5 million in expenditure directly related to music by Indigenous artists. This expenditure can be categorized broadly into labour, programming fees and other expenses.

Figure 27: Breakdown of expenditure incurred by companies in the Indigenous music community

Labour: companies spent $6.5 million on employee wages and benefits, and freelance and contract worker wages in the last fiscal year. They paid their full-time employees an average annual salary of $24,200.

Programming: companies spent $3.8 million in programming fees in the last fiscal year.[18] Of that amount, more than one-third (36%, or $1.4 million) was paid to Indigenous musicians. Because these fees are also represented as artist income, they were excluded from the calculation of economic impact of companies.[19]

Other expenses (e.g., overhead, travel, etc.) totaled to $7.2 million in the last year. This spending includes fees paid to other Indigenous suppliers. These fees represent money circulated within the community, and hence were excluded from the economic impact calculation.

7.3 ECONOMIC IMPACT

7.3.1 DIRECT ECONOMIC IMPACTS

The Indigenous music community was directly responsible for an estimated **2,910 FTEs.**[20]

Table 19: Direct Employment Impact of the Indigenous Music Community

	Companies	Artists	Total
Labour income	$6.5 M	$57.2 M[21]	**$63.6 M**
Average salary/earnings	$24,200	$21,700	
Direct employment impact	270 FTEs	2,640 FTEs	**2,910 FTEs**

Source: Nordicity MyEIA Model, Statistics Canada, federal and provincial government accounts.

Direct GDP impact of the salaries paid by companies and the income earned by artists is estimated to be $63.6 million.

As stated previously, some of the income earned by artists and companies is tax-exempt. They do, however, pay taxes on a large majority of their income, generating **$25.1 million** in **taxes** in total at local, provincial and federal levels.

[18] Fees paid to artists, musicians and performers.
[19] Without this adjustment, programming fees would be double counted – once as artist income, and twice as programming expenditure.
[20] This figure which is calculated as labour spending divided by average salary was estimated separately for companies and artists and then summed.
[21] Adjusted for tax-exempt income.

Table 20: Direct Fiscal Impact of the Indigenous Music Community

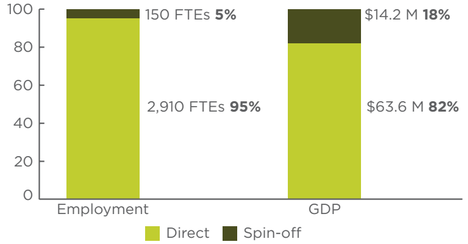
	Federal	Provincial	Total
Personal income taxes	$9.7 M	$7.3 M	**$17.0 M**
Corporation income taxes	$0.2 M	$0.1 M	**$0.3 M**
Consumption taxes	$1.4 M	$3.2 M	**$4.6 M**
Local property taxes and other fees	$0.0 M	$3.2 M	**$3.2 M**
Total	**$11.3 M**	**$13.8 M**	**$25.1 M**

Source: Nordicity MyEIA Model, Statistics Canada, federal and provincial government accounts

7.3.2 TOTAL IMPACT

The total GDP impact (direct + spin-off) of the Indigenous music community is estimated to be $77.8 million. The community also supported 3,060 FTEs.

Figure 28: Breakdown of Total Economic Impact of the Indigenous Music Community



Source: Nordicity MyEIA Model, Statistics Canada, federal and provincial government accounts

The economic activity outlined above generates tax revenue, detailed in the table below. In total (direct + spin-off impacts), the Indigenous music community contributed $30.7 million in taxes at local, provincial and federal levels.

Table 21: Total Fiscal Impact of the Indigenous Music Community

	Federal	Provincial	Total
Personal income taxes	$11.8 M	$8.9 M	**$20.8 M**
Corporation income taxes	$0.3 M	$0.1 M	**$0.4 M**
Consumption taxes	$1.7 M	$3.9 M	**$5.6 M**
Local property taxes and other fees	$0.0 M	$3.9 M	**$3.9 M**
Total	**$13.8 M**	**$16.8 M**	**$30.7 M**

Source: Nordicity MyEIA Model, Statistics Canada, federal and provincial government accounts.

barriers and challenges

"Artists are by definition artists. We are not businesspeople."

Indigenous artists face *specific* barriers and challenges while also operating in an environment that has *systemic* barriers and challenges.

> [Indigenous artists] have faced systemic barriers with little or no funding or infrastructure. It is often noted that as Indigenous artists have been creating their works, they have also had to build the arts infrastructure, training/mentorship programs, networks, venues,critical discourses, etc., at the same time. (Canada Council for the Arts 4).

According to survey respondents, access to funding (41%) is perceived as the most significant challenge, both for artists trying to build a music career and for businesses and others who support them. Other common challenges include marketing and promotional activities to build an audience (28%) and geographic location (22%).

Table 22: Challenges Facing Indigenous Music Community

	Total	Artists	Businesses	Supporters
Access funding	41%	41%	55%	35%
Marketing/promotion	28%	28%	31%	28%
Geographical location	22%	23%	24%	19%
Performance or recording opportunities	18%	21%	8%	17%
Finding clients/getting gigs	17%	21%	21%	11%
Acess to support positions (managers, agents)	17%	18%	13%	20%
Building busniess re;ationships	17%	14%	22%	18%
Being self-employed/having your own business	15%	15%	16%	13%
Being an Indigenous person/organization	14%	16%	10%	14%
Grant/funding reporting requirements	14%	14%	16%	13%
Professional developement opportunities	13%	11%	9%	17%
Learning about the business of music	13%	13%	8%	16%
Musical or artistic challenges	13%	12%	15%	13%
Managing cash flow and finances	12%	13%	14%	9%

One in ten (11%) survey participants identified a challenge that was not on the list provided.

Among artists surveyed, these other challenges include: finding time for music, especially when the artist also has other work responsibilities; personal challenges including family and child care responsibilities, mental health needs and adequate housing; finding other musicians to work with; and the challenges facing the music business as a whole (e.g., recorded music/CD sales).

Among businesses and supporters surveyed, these other challenges include: finding Indigenous artists (e.g., finding local artists, artists who are at level where they are ready to perform, and artists who want to be on the radio); limited budgets/lack of funding to book Indigenous artists and fund their travel if they are not local; and the challenges facing the music business as a whole.

Interview respondents provided additional perspectives on some of these key challenges, as outlined below.

8.1 ACCESS TO FUNDING AND FINANCES

Many musicians were not aware of all of the possible funds and grants available to them, and were unsure how to find out more. Some who have applied expressed frustration with how difficult and complicated it is to access funding and apply for grants; it was likened to a 'labyrinth'. While some have had success in receiving grants, others characterized their experience as 'hit or miss'. Without help from professional managers, producers, business colleagues and those who 'understand the language of grants', it is difficult to determine where and how to access funding to practice, record and tour as a musician. As one respondent said, "grant programs are not designed for emerging artists, they are designed for established artists". Another commented "we are good at oral traditions, we are not grant writers." Some musicians found the reporting process cumbersome, difficult and sometimes overwhelming.

For some musicians, accessing financing was difficult. Some self-finance their music through credit cards and lines of credit.

A few musicians spoke about navigating taxes and the Canada Revenue Agency, and trying to understand the threshold for collecting and paying taxes.

Some musicians who manage their own careers and who work with band members, venues and other musicians described the challenge of managing cash flow, knowing what and how to pay people, and figure out fair compensation. Others noted that they have been inconsistently paid for performing, or are offered non-monetary, inappropriate payment (drugs, alcohol).

A few Québec respondents said there is a hierarchy that establishes what artists are paid. Indigenous artists in Québec are better paid when they perform outside of the province, and English-speaking Indigenous artists are paid more than French-speaking Indigenous artists in the province.

8.2 MARKETING AND PROMOTION

Key challenges relating to marketing and promotion include the short attention span of youth, and the consequent difficulty of getting them to explore new music by Indigenous artists; the cost of marketing and promotion; failure to use social media, or use it effectively; lack of understanding about how radio stations work, and the process of getting songs played on radio.

8.3 GEOGRAPHIC LOCATION

Musicians who live far from major cities, on reserve or in the territories described the challenges associated with remoteness. These included distance from performance opportunities; low visibility ('we fall off people's radar'); cost of living and travel; slow or no Internet; few or no local recording studios; small or no community of other musicians ('feeling lonely'); and time spent getting to and from performances, festivals and other music opportunities. One musician commented on the difficulty of recordings music in smaller locations with fewer musicians, fewer options for instrumentation, and musicians who most often have other jobs or commitments. In many small communities, it is particularly difficult for youth to develop as artists because there are no music stores, limited access to musical instruments, mentors, music lessons or programs.

> "The greatest challenge I feel towards the music industry is, 'where do you start?' It seems unachievable."

For some musicians in cities, the challenge is not opportunities, but competition, and the pressure to succeed and stand out in the music scene. Cultural isolation can also be discouraging: one musician said it can be lonely in the city without family and 'you need a purpose to be there, otherwise you can get lost.'

A few musicians said they get more opportunities to perform outside of their home cities than they get locally; one respondent he had to move to a different city to access new audiences and opportunities.

Some musicians commented on a perceived disparity in support for Indigenous music between the various provinces and territories; it was suggested that many programs and grants are available for Indigenous artists in some regions (e.g., Manitoba, for example) but not in other regions (e.g. Alberta or Québec, for example).

8.4 BUSINESS ASPECTS OF MUSIC INDUSTRY

Many musicians are self-taught in all aspects of the music business, including management, administration, accounting, and all other business aspects of their work. It can be extremely challenging to seek out and book gigs, schedule travelling, organize performances, and simultaneously manage a musical career while making a living with another job or teaching. The music industry is vast and structured and, as one musician said, "it is hard to find our place in it because it is so complicated." Some of those who are self-managed acknowledge lacking business acumen, knowledge, skills and the basic functions associated with self-employment like budgeting, cash flow, taxes, accounting, and merchandise inventory.

8.5 MUSICAL OR ARTISTIC CHALLENGES

Some musicians described how challenging it can be to 'talk shop with other people face-to-face' and collaborate, given that many musicians have day jobs and families and do not work in music full-time. Logistical challenges include coordinating multiple musicians to confirm dates for performances and tours, particularly working with musicians who have jobs other than music or who live in different communities.

A few musicians who work predominantly in an Indigenous language cited difficulties in getting work, and in convincing venues and festivals to program musicians who sing and perform in their languages.

> "We have to wear so many hats; it's a factor in not having enough time to create."

8.6 INDIGENEITY

More than two-thirds of interview respondents highlighted challenges and barriers experienced because they are Indigenous or because they represent or work with/for Indigenous musicians. The following are the most common responses:

- Prejudice, ignorance, discrimination, misogyny and racism, 'devaluing the work of Indigenous musicians'
- Overcoming stereotypes ('drunk Indian', 'always late', Indigenous music as 'exotic')
- Fighting tokenism (getting work, being invited to apply for a grant or appearing at festivals to 'fill a quota' for diversity; only being invited to play at certain times 'during Indigenous hour' or at certain venues, convincing festivals and bookers that Indigenous artists play all genres of music; they don't 'only play drums and folk music')
- Intergenerational trauma and effects of colonialism (low self-esteem, low self-confidence, alcohol and drug abuse, mental health issues, lack of pride in being Indigenous or speaking/learning their Indigenous language, lateral violence, poverty, lack of education)
- Seeing Indigenous people as homogeneous/interchangeable

Photo **Jordan Thomas**

successes and opportunities

Most musicians point to their families, communities and support networks as key to their success in the music community. Some come from musical families and are following in their parents or other relatives' footsteps. Others want to make their community proud, and show youth that success in music is possible.

Hard work, determination, persistence, positive self-identity, endurance and resiliency are important factors in most Indigenous musicians' success. You have to 'be in it to win it,' as one musician said.

Many musicians point to the value of mentors, and the importance of seeking and taking advice, as reasons for their success. Skills and knowledge acquired from mentors include cultural teachings; singing or playing a musical instrument; business skills; technical skills; marketing and promotion.

Commercial success, respect and recognition within the Indigenous community, and presence in the mainstream were identified by artists as indicators of success. This can includes awards, hits on radio and charts, recognition in the industry and accolades from the listening public. For some musicians, simply making a living as a musician/performing artist is evidence of success.

Some musicians view themselves as successful because they have been able to mentor youth, share their knowledge and pass on their musical skills to the younger generation.

"I think we need to tell Indigenous artists that they need to believe in themselves and challenge each other more."

Some musicians equate success with 'good relations'; networking, learning from other artists, and collaborating with other musicians.

For a number of non-Indigenous respondents (representing managers and producers), success is tied to the success of the artists they represent. Success is built on networking and the ability to help artists with skills and knowledge in areas like writing grants, positioning artists through marketing, networking and fan development. A few respondents were able to leverage their connections in the music industry help raise the profile of the indigenous musicians they represent, and of Indigenous music in general.

"Right now Indigenous music has really hit its stride... the market for our music is growing bigger and bigger."

Artists see many opportunities and positive prospects for the current music community and music industry. Several pointed out the number of grants and funds for Indigenous artists continues to increase (even though some musicians said they are not as aware of these grants as they would like to be). One pointed out that regional and provincial arts and music organizations are now specifically targeting and supporting Indigenous artists.

Many musicians saw important opportunities for Indigenous musicians in the emergence of social media. Several commented on the relative ease with which music can now be produced and distributed music through the Internet and social media, allowing Indigenous musicians to 'take control of their own careers' to a much greater degree.

The size and growth of the Indigenous music community also presents many opportunities. Those who represent and promote Indigenous artists commented on a major change in the number of Indigenous artists in every genre, and the talent seen across the country. There is a growing interest in listening to and following Indigenous artists. Festivals and events are now actively seeking more diverse artists, promoting what one respondent called 'cultural parity', and creating experiences that reflect greater artistic variety and expose audiences to new and unique sounds.

Opportunities for collaboration between Indigenous musicians was also cited by many musicians as a positive trend in the industry. Increasing, Indigenous artists are seeking out, and creating, events and forums to work together, network and learn from each other, and for Indigenous musicians to work with Indigenous and non-Indigenous music professionals and learn from experts. It also provides artists with the chance to come together and hear each other's music. This was exemplified for one musician by Nunavut Music Week. "The biggest thing is having festivals where multiple artists and multiple industry people get together."

"We have cultures to be proud of. This is an opportunity for us to share."

"There's a move towards reconciliation—Indigenous musicians are being included in more public events. Canadians need to see an Indigenous performance at least once."

More and more musicians are lending their voices to national conversations like the Missing and Murdered Indigenous Women and Girls inquiry or to political activism. A few respondents noted that increasingly, "artists are the messengers"; there are and increasing number of opportunities to share those messages.

The proliferation of awards for Indigenous musicians is a boost to the Indigenous music community, provides tremendous opportunities for exposure, and demonstrates the quality and diversity of Indigenous music in Canada. The most recent announcement in Québec is an example of this; the Association Québécoise de l'industrie du disque, du spectacle et de la vidéo (ADISQ) announced they will begin offering the first-ever Felix Aboriginal Artist of the Year award in 2019.

The mainstream music industry is 'looking for something new' and the Indigenous music community provides it. There is a greater awareness of Indigenous musicians and 'a willingness to accept Indigenous music and artists.' This awareness is growing among all Canadians, and within Indigenous communities and among Indigenous peoples as well. "Community interest is a big factor in order for the [Indigenous] music community to succeed..." The convergence of interest, awareness and technology has led to unprecedented opportunities and platforms for sharing Indigenous cultural perspectives and worldviews across, and beyond, musical genres.

Several musicians spoke about the importance of sharing their culture and revitalizing language through music.

Some respondents anticipate a bright future for Indigenous youth who want to pursue music as a career. Now and for the foreseeable future, they will be supported by a growing community, better access to funds, training opportunities like music camps and mobile music studios, Indigenous mentors and business support. There are also more music-related companies owned and operated by Indigenous people.

One respondent pointed to the growing number of music festivals as a positive trend in the music scene. These festivals provide exposure for Indigenous artists and, with daytime programming, also provide family programming and a venue to introduce children and youth to Indigenous musicians.

"Now there is a certain openness to the presence of indigenous artists. We used to be seen as exotic and different 20 years ago, but now there's a greater awareness or willingness to accept Indigenous artists."

Photo **Jordon Thomas**

considerations for further development

"More exposure of these musicians on bills, festivals, in the press, on JUNO awards, to normalize what can be perceived as exotic or 'not for me' or 'world music' or whatever."

Based on interview and survey responses and the economic impact assessment, the following are priority areas for reflection, research and planning to further the development of professional Indigenous peoples working in the music industry and strengthen the Indigenous music community.

These priority areas fall under the following four broad themes:

1. Building Relationships
2. Creating Opportunities
3. Providing Training and Support
4. Financing and Funding

10.1 BUILDING RELATIONSHIPS

It is increasingly important in this era of reconciliation to build or re-build relationships among Indigenous musicians, between Indigenous and non-Indigenous musicians, and between Indigenous musicians and the music industry, media and the Canadian public.

Part of building and re-building relationships is about understanding truth and reconciliation, as stated by former Truth and Reconciliation Commission Chair Senator Murray Sinclair. Canadians should be aware of the shared, difficult history of this country. Management companies, managers, agents, promoters and publicists who work with Indigenous artists would benefit from Indigenous cultural awareness training to help them understand the unique histories, cultures, challenges and realities of Indigenous artists.

There is also an overall need to promote greater awareness of the diversity of Indigenous music. 'Indigenous music" is not a genre, and Indigenous music should not be considered 'world music'. As noted earlier in the report, Indigenous music can be expressed through any genre or combination of genres, and is in fact giving rise to entirely new and unclassifiable forms of musical expression.

"We need access to indigenous and non- indigenous professionals who understand the industry and believe in us and help us rise with our talent without compromising our nature."

Indigenous artists are inspired by and learn from each other. They want and need more opportunities to collaborate, increase their skills, network and encourage each other. Musicians spoke of the benefits of programs such as the Indigenous Music Residency hosted by Manitoba Music, and the recent gathering of Indigenous classical musicians at the Banff Centre for the Arts and Creativity. These residencies allow musicians to assert music sovereignty, collaborate, increase their skills, network, and encourage each other.

Many musicians interviewed for this study cite mentors as key to their success. Mentors are more than simply trainers; they can also provide cultural support and strengthen relationships among Indigenous people in the music community. There is a need for strategies to encourage and support more mentorships between emerging and established Indigenous artists, and also between Indigenous musicians and professionals in the music industry, particularly those with music business acumen.

Most Indigenous musicians self-manage all aspects of their career. Many 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. One option would be an online database listing recording studios, agents, managers, record labels, promoters and publishers that currently work with Indigenous artists, or are willing to consider working with Indigenous artists. This could be supplemented by a database or register of Indigenous musicians. These resources, if developed by the Indigenous music community, could be of real, practical, and immediate benefit to both Indigenous musicians and the Canadian music industry as a whole.

10.2 CREATING OPPORTUNITIES

The creation of those opportunities will require listening to Indigenous voices and giving space to Indigenous creators. Through centuries of colonialism, Canada regulated, legislated and imposed its patriarchal systems on Indigenous peoples and silenced Indigenous voices by speaking for, and interpreting Indigenous realities. Canada must now allow those voices to be heard again, and open the door for Indigenous artists seeking to tell Indigenous stories in every medium. Today non-Indigenous musicians are routinely hired to produce, write and perform 'Indigenous-themed' music; in the future the work of creating Indigenous musical content must be given to those whose spirit and culture is being expressed. This was articulately expressed in the Indigenous classical musicians' musical sovereignty statement: "As Indigenous creators,

"We need less restrictive guidelines to identify as an Indigenous musician - we shouldn't need a pan flute on our album to be considered an Indigenous artist."

we value our non-Indigenous collaborators and creative partners. We invite partnership across all levels (librettists, orchestrators, performers, producers, curators, artistic directors, etc.) and insist that when telling stories that are specific to Indigenous experiences that we as Indigenous creators are granted authority and full oversight on how our Indigenous communities are portrayed" (Derksen, McKiver and Cusson). Another example is the recent announcement of the National Music Centre's Indigenous Programming Advisory Committee which was created to "play an important role, providing critical feedback and content for the National Music Centre" (National Music Centre).

Indigenous artists want greater access to mainstream media and to fans. What measures could be put in place so that there is a higher percentage of Indigenous music on mainstream radio stations? How can there be an increase in the number of songs from Indigenous musicians on Indigenous radio stations? How can there be more music by Indigenous artists on satellite radio? There can be more opportunities to provide Indigenous-themed feature stories, reviews, and profiles in music industry publications and local and regional newspapers, radio and television stations.

Management companies, record labels, companies that publicize, promote and market Indigenous musicians currently employ few Indigenous staff. For example, in a study on the BC music industry labour market, a key finding was that "the music industry workforce in BC includes a lower proportion of women, people who self-identify as Indigenous and visible minorities than the provincial economy" (Adam Kane Productions and the Deetken Group). There is considerable room for greater Indigenous inclusion in music industry companies; there are also a number of proven, effective models from various jurisdictions for strategically increasing employment in a specific sector. As an example, IsKwé, a Cree/Dene musician is a board member of Women in Music Canada, an organization that works to see greater gender equality in the Canadian music industry. The same could be done for greater Indigenous inclusion.

There are many music awards in Canada and more and more Indigenous musicians are being nominated for and winning them (Polaris Prize, Country Music awards, Folk music awards, etc.). There are also Indigenous-specific awards at national and regional awards such as the JUNOs or the Saskatchewan Country Music Awards. And there are Indigenous-specific awards such as the Indigenous Music Awards and the sākihiwē festival. It is important that the Indigenous music community (which includes First Nations, Inuit and Métis musicians) develops the criteria for the awards to ensure it is representative of, and open to First Nations, Inuit and Métis artists; the criteria may need to be more inclusive; and there needs to be more Indigenous musicians who sit on juries and decision-making bodies in selecting the award-winners. The recently created Félix award in Quebec is an example.

A database or comprehensive list of all funding opportunities for Indigenous artists would give Indigenous artists an opportunity to know what grants and funds are available to them. This database could be divided into categories of grants and types of support available.

There are opportunities to address the underrepresentation of music by Indigenous creators on TV and in film and on streaming services. For example, in 2019, a Toronto-based music production company, Bedtracks, created the first Indigenous music licencing catalogue so that music by Indigenous artists can be considered for TV shows, films, advertising, online videos and other media. As of early 2019, there were over 300 tracks in the catalogue (Bedtracks). A music veteran, Brian Stachel is hoping to launch something called The Legacy Project to see more Indigenous musicians represented on streaming services like Spotify. These are two examples and there could be more opportunities for further collaboration so musicians can have additional areas of income and exposure.

Indigenous artists want more professional stage opportunities. This could be Indigenous-specific venues as well as major stages and spaces across Canada, though there is a need for these spaces in Nunavut as there is currently no performing arts space in the territory.

There are music and arts festivals taking place in every region of Canada. Indigenous artists appreciate opportunities to play at music festivals and want to be included in mainstream multi-disciplinary arts festivals. This provides opportunities for exposure to a wider audience, including families and children during daytime shows.

10.3 PROVIDING TRAINING AND SUPPORT

While creating opportunities is critical to advancing the Indigenous music community, this is not sufficient if Indigenous musicians are not prepared to take advantage of these opportunities. Indigenous musicians would benefit greatly from increased training and support in a number of areas.

Most Indigenous musicians are self-managed. They oversee all aspects of their career and yet many say that they do not feel equipped to 'wear all the hats' needed to successfully manage their career such as finances and budgeting, recording and publishing, marketing and promotion. Musicians are asking for more training opportunities to learn more about the business aspects of the music industry.

Nearly every Indigenous musician interviewed for this study highlighted the importance of social media to promote and market their music, yet many musicians said they need more training and support for how to best use social media and how different platforms work and can enhance their exposure to a wider audience.

"I specifically wanted to hire someone who was Indigenous because I felt uncomfortable having Indigenous musicians on our roster but mostly white people on staff. Felt it wasn't very balanced. We need to develop the industry side as well."

There is an acute need for professional development and training in small, rural and remote communities across the country. The training needs to be hands-on, practical and cognizant of Indigenous modes of learning (for example, not classroom-style teaching, not based on extensive reading and writing requirements). Mobile units and travelling studios like N'we Jinan and Wapikoni Mobile were provided as positive examples of the types of training that can be offered.

Some Indigenous musicians, particularly emerging musicians, are not fully aware of the benefits and opportunities presented by registering with music rights collectives such as SOCAN. Specific training or awareness-building workshops would address that need; and agencies offering music rights support should consider a campaign of targeted outreach to this growing potential client base.

Indigenous youth must be introduced to and take advantage of the training and educational opportunities that lead to careers in every facet of the music industry. Career fairs and school recruitment programs could reach out directly to Indigenous students, and foster greater awareness of educational opportunities in areas such as music production, music management, marketing and promotions, and the technical aspects of the industry.

Consideration should be given to investments in music education for Indigenous youth; one example would be a program to provide musical instruments and lessons for students, particularly in rural and remote communities. Children and youth need to know that a career in the music industry is available, attainable and rewarding, as evidenced by the many Indigenous people who have found success in the music industry.

10.4 FINANCING AND FUNDING

Canada's history of systemic racism, injustice and discrimination has had an impact on every aspect of the Indigenous economy, and that includes the Indigenous music community. The data in this study shows that, for those who are unable to work at music full-time, almost half of musicians' income comes from non-music activities. Grants and public funds make up only 7% of musicians' income; the largest percentage of music-generated revenue comes from live performance. Without additional support, these figures suggest that a career in music is not sustainable for many Indigenous people. Strategic equity investments will be required to address many of the needs identified in this study, including enhanced grants and contribution programs to support and expand opportunities for new, emerging and established Indigenous artists. Another key area of untapped revenue for Indigenous artists is payment when their songs are played on radio stations, including Indigenous radio stations and satellite radio.

Current program and funding models do not take into account the special considerations associated with producing, recording, performing and touring as an Indigenous musician. Program, project and event funding must reflect the higher cost of living in the far North and on reserve and in remote regions, as well as travel to and from the far North, rural and remote communities and First Nations. Such indices are already applied to northern travel and salaries for government employees. A more realistic reflection of actual costs of living and travel would increase the number of Indigenous artists attending festivals, showcases and events; performing beyond their home region; pursuing professional development opportunities; and accessing recording studios.

"There is an ongoing problem in the music industry of executives taking advantage of artists. But it's a lot more challenging when there are other historical or territorial or stereotypical issues around the artists...we need more companies who...understand the responsibility of taking care of their [Indigenous] clients respectfully."

Based on a brief review of provincial arts councils, music organizations and Indigenous organizations and interview responses, provincial and territorial levels of investment and support for Indigenous music are not consistent or equitable across the country. Some regions (Manitoba was given as an example) have a wide range of programs and support for Indigenous artists through provincial arts councils, music organizations and Indigenous organizations; other regions (Alberta and Québec were given as examples) have fewer funding envelopes and programs. Nunavut does not have an arts council or a music association to support Inuit musicians. Efforts are required to establish a consistent and comparable baseline of support for Indigenous musicians in every region.

For various reasons (including lack of education, language barriers, not understanding the criteria, confusion around technical language, and poor Internet access), some Indigenous musicians report difficulty filling out grant and funding applications. Additional assistance, particularly through one-on-one telephone and in-person guidance, would benefit Indigenous musicians. This kind of practical support could also be provided at Indigenous music gatherings.

Meaningful and sustainable growth in the sector will require more than just bigger budgets; a broader, comprehensive transformation is needed to ensure that funding envelopes, criteria, application forms, and reporting requirements are culturally appropriate, accessible, and reflective of the sector's realities. This will require an organizational shift similar to that undertaken by the Canada Council for the Arts, as outlined in the 2015 evaluation report on the Aboriginal programs.

> [Early Canada Council for the Arts] priorities articulated the intent of ensuring equitable access with an underlying assumption that, once equity had been achieved, Aboriginal artists would be fully integrated into mainstream programs. However, in its Report to the Council (1993), the First People's Committee on the Arts interpreted its mandate as a "means by which Aboriginal people are able to determine the future of their own artistic practices within the Canada Council." This is a somewhat different intent, focusing on self-determination and self-actualization" (Proactive Information Services Inc., and Program Evaluation & Beyond 15).

10.5 INDIGENOUS CULTURAL/MUSIC SOVEREIGNTY

In this era of reconciliation, Canadians are seeking greater Indigenous awareness, and coming to a collective understanding that we must work together to fully include Indigenous people in all aspects, and at every level, of society. This will include creating opportunities for Indigenous people in the music industry. It will also mean **understanding Indigenous cultural sovereignty**. In the legal domain, the Crown/federal government has a well-established and constitutionally mandated 'duty to consult and accommodate'. The various levels of governments and publicly-funded arts and music organizations in Canada, in the spirit of reconciliation, have a similar responsibility to reach out, integrate and incorporate Indigenous ways of knowing and perspectives in all aspects of the music industry in this country. Further, such measures must be planned and implemented in a way that reflects the principle: "Nothing about us without us."

A specific, practical step to advance many of findings in this report and assert music sovereignty would be the establishment of a **National Indigenous Music office or organization**. Indigenous musicians and others in the music community have attempted over the years to create organizations and associations to represent and advocate for Indigenous musicians including the National Aboriginal Recording Industry Association, however, no such national organization currently exists.

A National Indigenous Music office or organization could play the lead role in addressing many of the challenges identified in this Study, and in implementing its considerations. Some possible areas of activity/responsibility of this organization or office include: establishment and maintenance of databases and lists of Indigenous musicians and funding envelopes; advocacy on behalf of Indigenous musicians with various levels of government; work with provincial music associations to streamline and standardize support for Indigenous musicians; recruitment and retention of Indigenous peoples in all aspects of the music industry; promotion of music as a career Indigenous to youth; and development of policies, processes and initiatives with the federal government and national organizations to support and promote Indigenous music in Canada.

One possible model is the Indigenous Screen Office, announced by the Department of Canadian Heritage in 2017. The mission of that Office could easily be adapted for the music industry: *The Indigenous Music Office's mission is to support and develop Indigenous musicians and Indigenous stories in music, and increase representation of Indigenous peoples throughout the music industries in Canada.*[22]

[22] Adapted from the Indigenous Screen Institute's Facebook page: The Indigenous Screen Office's mission is to support and develop Indigenous screen storytellers and Indigenous stories on screens and increase representation of Indigenous peoples throughout the screen industries in Canada. https://www.facebook.com/pg/ISO.BEA/about/?ref=page_internal

conclusion

The Indigenous music community is vibrant, growing, and incredibly diverse. Indigenous musicians continue to garner worldwide attention, audiences and accolades. Governments, national and regional associations and organizations, foundations and private sector businesses are rapidly recognizing the growing social, cultural and economic impact and potential of the bourgeoning Indigenous music industry.

There continue to be systemic barriers and obstacles to asserting Indigenous music sovereignty and work needs to be done to ensure equitable access to funding and opportunities. Those who live and work in rural and remote communities and in the territories continue to face significant challenges in accessing audiences and markets. While live performance, broadcasting and recording artists are enjoying unprecedented levels of exposure, there are still very few Indigenous people working in the music industry. And though Canadians in general are more aware of Indigenous issues and the effects of colonialism; discrimination and ignorance continue to constrain the efforts of the Indigenous music community to achieve even greater success.

The transformation of the music industry in Canada will not be achieved "for" Indigenous peoples, but BY Indigenous peoples, asserting cultural sovereignty, with the support and collaboration of industry allies. Indigenous musicians must lead the way and the industry must make way for Indigenous owned and controlled management, marketing and other music-related companies that incorporate Indigenous worldviews and structures.

We are, indeed, as Jeremy Dutcher pointed out, "in the midst of an Indigenous renaissance". It is past time to listen to Indigenous voices and transform the music industry in Canada to better reflect Indigenous realities. This is reconciliation, as Jeremy Dutcher said when he accepted his 2019 JUNO award.

> *"Reconciliation is a lofty goal. It's a dream. It doesn't happen in a year. It takes time. It takes stories. It takes shared experience. It takes music... I have hope that we can come to right relations with each other."*

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Please note that all appendices are included as a separate, stand-alone document.


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