



CPAF  
Canadian  
Public Arts  
Funders

OPSAC  
Organismes publics  
de soutien aux arts  
du Canada

# The Changing Landscape of Music in Canada

Shifting practices,  
new models and  
innovations in support

CPAF/OPSAC  
Professional Development Meeting on  
Music  
Toronto, March 2013

**MM+A**  
Micheline McKay  
& Associates

# Objectives

- + Provide an overview of current knowledge
  - + shifts in artistic practice
  - + dissemination and audience
  - + new business models and monetization
  - + innovative support

# Micheline McKay & Associates

+ Public affairs insight and  
strategic advice for the cultural  
and not-for-profit sector

Consulting Team  
Micheline McKay  
Angela Birdsell

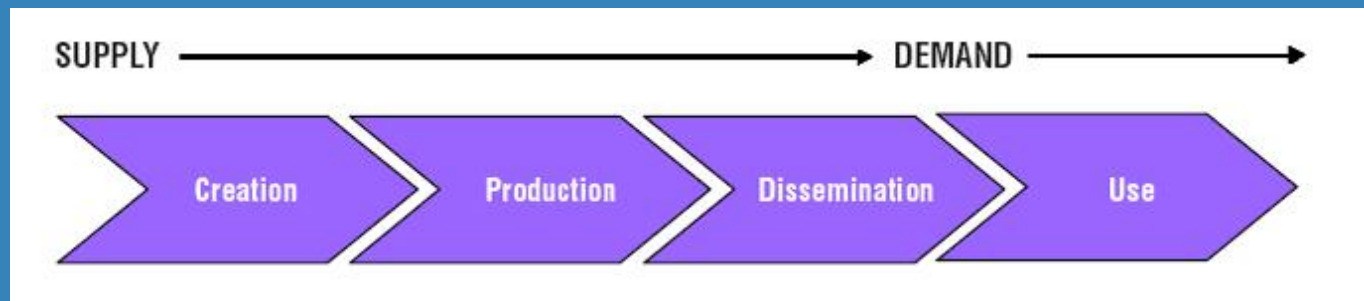
# Methodology

- + Web-based literature
  - + websites, reports, articles and blogs, from MIAs, funders, government and the media
- + Telephone interviews with CPAF members, Canadian Heritage and FACTOR.
- + Interviews with thought leaders.
- + Interviews with:
  - + Arts Council of Australia
  - + Arts Council of England
  - + (web review of EU Culture Commission).

# Canada's Music Sector

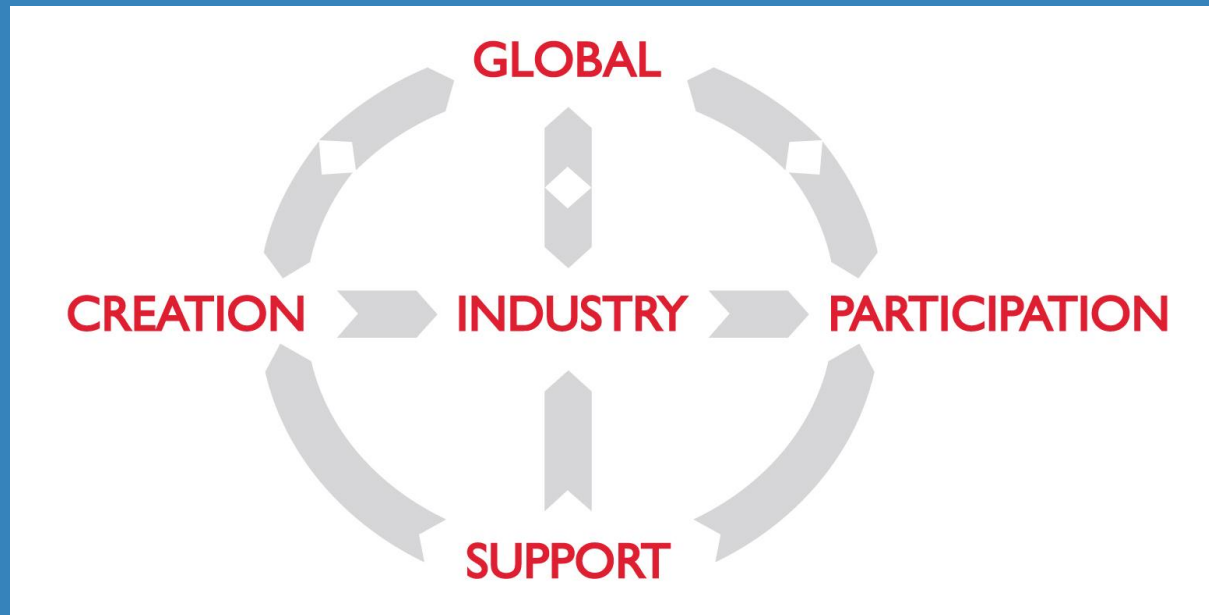
- + Total expenditures by music organizations registered in CADAC: \$354 M (2011-12)
  - + Combined CPAF member support: \$74 M
  - + About 25,000 artists employed
- + Record production and distribution: \$524 M
- + Impact of live musical performance: \$252 M
- + 34,000 Canadians list occupation as musician/singer
- + 2,300 identify as conductor, composer, arranger

# Digital technologies and music



Basic Creative Chain for Culture Goods and Services

# The Australian Arts Council



The music ecosystem

([www.artfacts.australiacouncil.gov.au](http://www.artfacts.australiacouncil.gov.au) (accessed 23 February 2013)).

# Shifts in artistic practice

- + Multi-genre, multi-disciplinary approaches
- + Ease of entry
- + The DIY culture
- + The visual element
- + Partnerships and collaborations
- + Growing influence of diverse cultures
- + Returning to our roots
- + The blurring of professional vs. amateur



# Shifts in dissemination and audience

- + Digital access
- + Live performance
  - + Touring
  - + Alternative venues
  - + Different experiences
- + Festivals
- + At-home audience
- + Rooted in community
- + Demographic and generational shifts

# Impact of social media

- + More direct relationship with artist
  - + increased audience expectation
  - + increased demands on artist/music group
  - + immediacy
- + Increasingly sophisticated audience analysis possible
- + Growing dominance in Canada
  - + 35% of social networkers recommend music via social media (PCH study)

# Impact of social media, 2

## + The challenges

- + “unfiltered public criticism”
- + investment of time and resources

# New business models and monetization:

## *Individuals and small groups*

- + Revenue diversification is key
  - + touring and live performance
  - + merchandise
  - + sponsorship
  - + synchronization
- + Music is often offered for free

# Crowdfunding

*the raising of funds through the collection of small contributions from the general public (known as the crowd) using the Internet and social media (Nordicity, p.4)*

- + 17 crowdfunding platforms in Canada
- + Typically, best-suited to smaller organizations, budgets

# New business models and monetization: *Music organizations*

- + Slower to adapt to new models
  - + Legal and regulatory restrictions
  - + Less nimble to adapt
- + Collaboration

# Funder-led innovation

- + Increased touring support
  - + Out-of-province, international focus
- + Public crowdfunding models
  - + InvestYYC
- + Broadening of juries/PAC
- + Broadening of sectoral silos
- + Interest in common negotiation of music rights

# Funder challenges

- + Resistance to change
- + Uncertainty
- + Increased demand, undercapitalization of organizations and music groups
- + Inflexible, narrow criteria that does not respond to changes in sector



# Additional international perspective

## + Challenges

- + discrepancy in funding levels
- + increased need to diversify funding sources
- + changing scope/breadth of industry

## + Of interest

- + The role of residencies

# Implications and questions for CPAF

- + 'Silo' structure of funding?
- + Interprovincial collaboration
- + Addressing the blurring of commercial/non-commercial music
- + Implication of self-managed artists
- + Change in audience behaviour
- + Crowded market place, growing demand
- + Limited resources

# Thank You

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