

music NOVA SCOTIA

Board of Directors Annual Report 2012-2013



prepared by
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Acknowledgements

The Board of Directors of Music Nova Scotia wishes to acknowledge the contributions of our respected government, industry and corporate partners. Without their support our work would not be possible.

Acadia Broadcasting Limited (CKBW and Hank FM)
Atlantic Canada Opportunities Agency (ACOA)
African Nova Scotian Music Association (ANSMA)
Best Western Plus
Canadian Council of Music Industry Associations (CCMIA)
Canadian Independent Music Association (CIMA)
Casino Nova Scotia
Delta Hotels and Resorts
East Coast Music Association (ECMA)
Employment Nova Scotia
FéCANE
Foundation Assisting Canadian Talent on Recordings (FACTOR)
Halifax Pop Explosion Association
HFX Broadcasting Inc. (Live 105)
Marcato Digital
Maritime Broadcasting Systems
Molson Coors Canada
Music Managers Forum Canada (MMF)
Nova Scotia Department of Economic and Rural Development and Tourism
Nova Scotia Department of Communities, Culture and Heritage
Reeperbahn Festival
Region of Queen's Municipality
Réseau National des Galas de la Chanson
Rogers (News 95.7, Lite 92.9)
Ron's Trophy & Sign Shop Plus
SOCAN Foundation
The NSLC
The Queens County Advance
Ticketpro
White Point Beach Resort

The Board of Directors of Music Nova Scotia also wishes to thank all of our artists, industry professionals and volunteers who have contributed their time and expertise to the association throughout the year.

Board of Directors 2012-2013

Terms end June 30th of year shown.

Executive

Brian Doherty – President (2013)

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Kris McCann (2014)

Ian McKinnon (2013)

Jamie Robinson (2014)

Jonny Stevens (2014)

Josh Hogan (2014)

Krista Keough (2014)

Troy Arseneault (2013)

Jason Michael MacIsaac (2014)

Board Advisors

Gerry Boudreau – Life Long Director

Brian Awad – Legal Advisor

Music Nova Scotia Staff 2012-2013

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President's Message

Firstly, I would like to wholeheartedly thank Executive Director Scott Long and the staff of Music Nova Scotia (MNS) for their continued and tireless hard work and dedication to our association. MNS continues to remain financially stable given the economic conditions and the ongoing challenges associated with securing public and private investment. Public and private revenues, in spite of challenges have increased by \$50,000.00 over the past year compared to the year prior. Our strong project activity and continued expanding focus on export and international business development are responsible for the increase in revenues.

This past year we undertook a number of Special Community Projects - Titanic 100 was a sell out show produced by MNS. MNS volunteered to program talent for the IWK Telethon last May and worked with HRM staff to provide an all Nova Scotia playlist for the Oval this winter. Also, during the past year Music Nova Scotia has formed a new relationship with MusicCounts, the charitable wing of the Canadian Academy of Recording Arts and Sciences that provides musical instruments for schools and community groups in need.

Our partnership with Casino Nova Scotia continues to strengthen as we have renewed a second year of New Music Fridays and Kitchen Party Thursdays. This partnership has been extremely beneficial and provides Music Nova Scotia members with a paid performing opportunity. Thanks to Helen MacMillan, Amie Moore and all the staff at Casino Nova Scotia for supporting local music so generously.

Our role as an export office continues to grow. NSMW 2012 Liverpool hosted the largest edition of our International Buyers Program to date and featured a Spotlight on Germany. The association also produced export-showcasing events at The Great Escape Festival (UK), Reeperbahn Festival (DE), Association of Festival Organizers Conference (UK) and SXSW (USA). Our work in international business development this past year was directly responsible for over \$600,000.00 in artist revenue. Investment in these projects was approximately \$300,000.00 and Music Nova Scotia continues to show that investment in international business development is effective in producing positive financial results for our sector.

It is important to note the release of the Music Nova Scotia Export Strategy, which was completed in March. The document will be used by staff as a guiding tool to ensure that MNS continues to implement best practices when it comes to international business development strategies.

Nova Scotia Music Week returned to Liverpool, Nova Scotia after winning Best Small Market/Regional Event of the Year at The Great Escape Yearly Conference Awards. The event continues to grow in delegate numbers each year. Remarkably White Point Beach Resort was ready in time to host NSMW, the first event in their new lodge. Thanks to everyone in the host community for your contributions and to the many volunteers, the heartbeat of our communities.

Thanks and congratulations to the Board of Directors for the many hours of devotion and effort you have given in guiding our organization with dedication and determination. We stay strong because of your insight and service. To those of you who are leaving the Board this year, we are deeply grateful for your friendship and input in the past and wish you much success in your future endeavors.

It has been a pleasure to serve as your President in 2012/2013.

Brian Doherty

MEMBERSHIP SERVICES



With such opportunities as one-on-one consultations, educational workshops, regional, national and international showcase opportunities, a business resources centre, and unlimited networking opportunities, it's no wonder Music Nova Scotia is the largest nonprofit music industry association in Canada. Our current membership boasts regional and national Nova Scotian songwriters, musicians, agents, managers, promoters, distributors, record retailers, record companies, studios, radio stations, associations, lawyers, graphic designers, accountants and more.

Membership Training & Funding

Music Nova Scotia creates and supports projects that help stimulate growth and develop sustainable careers in the music industry. We have a wealth of information to share with our members, whether it's through the staff, The Ardenne Resource Centre or our website www.musicnovascotia.ca.

Music Nova Scotia has a number of workshops and seminars each year and also provides consultations on a variety of music business topics. We tailor the needs of our members to industry realities. Notice of these workshops and seminars are sent through email, social media and posted to our website.

Members are welcome to book consultations with our staff to help career-building. Lisa Stitt is available to discuss issues regarding communications/publicity/media relations. Serge Samson is available to discuss how to bring your music to the next level, whether it is touring, creating an album or promoting yourself. Laura Simpson is available to discuss funding issues, especially those concerning the Export Development Program that is administered through Music Nova Scotia on behalf of the Province of Nova Scotia.

Laura Simpson is also FACTOR's Regional Education Coordinator at Music Nova Scotia. Members may book a consultation with her to review FACTOR funding applications. All of the funding programs can be found at <http://www.factor.ca> under 'Programs'.

Communication

Music Nova Scotia keeps its members up to date on a variety of music industry topics through daily email newsletters, social media, website updates, blogs and video blogs. Music Nova Scotia provides members with an internet presence through online profiles devoted to each and every member, comprised of contact information, a photo, a biography, show dates, music, and embedded video.

Members also have access to our daily newsletter. This allows artists to promote their music, events, band and/or organization to over 2,000 members, industry professionals and media throughout Nova Scotia and the rest of Canada.

Lobbying and Promoting

Music Nova Scotia acts on behalf of the Nova Scotia music industry regionally, nationally and internationally, both to government and other music industry representation. Music Nova Scotia promotes Nova Scotian music at major music conferences and festivals such as Canadian Music Week, The Great Escape Festival and Conference (UK), Reeperbahn Festival (Germany), SXSW, East Coast Music Awards, and also organizes the Nova Scotia Music Week International and Domestic Buyers Program.

Board of Directors and Committees

The Music Nova Scotia Board of Directors holds monthly meetings and shapes the direction of the association on behalf of its members. Music Nova Scotia holds elections every year for spots on the board. Committees work on specific areas for the association, including funding/sponsorship, events, membership and education.

Voting

Your membership entitles you to vote! One vote is given per individual or band membership and two votes per non-profit or corporate membership. The individual who signed up for the membership will be automatically considered the first voting member, unless otherwise stated. The voting members **MUST** be part of

the band/group/association membership.

We encourage our membership to attend and vote at our Annual General Meeting, held every June. This is where members have their say and can shape the path of Music Nova Scotia.

We also encourage members to attend and vote for Nova Scotia Music Week, a celebration of our provincial music industry, held every November. The more votes received for our awards show, the more reflective the results will be of our music scene.

Networking and Working in Our Space

Our office is your office. Use our computers (PC/Mac), or bring your own and connect to our wireless internet. We have a colour printer/copier, fax and scanner. If you want to copy posters for gigs, black and white copies are free (up to 50 copies) and colour copies are only \$0.50.

Many calls come into the office looking for bands, promoters, agents etc. Being a member of Music Nova Scotia may put money in your pocket. It is the policy of Music Nova Scotia to search our membership database first for business referrals.

The Music Nova Scotia office is the meeting place for artists and industry alike, many success stories have come out of just having a presence at the office.

Performing

Music Nova Scotia showcases are held throughout the year around the world. We have showcased Nova Scotian artists everywhere from a navy ship in Ireland to the Vancouver Winter Olympics. Opportunities to showcase are posted through email, social media and on our website. As a member, you can apply for these opportunities. These advertised showcasing opportunities are juried by your peers and/or festival bookers, who are chosen to be objective and knowledgeable.

Music Nova Scotia has partnered with Casino Nova Scotia to present New Music Fridays. Each week bands are booked at the Harbourfront Lounge, each one representing different stages in development. The goal for New Music Fridays is to celebrate and promote new local music while giving these acts the opportunity to build up their fanbase, take advantage of a great stage, and play their hearts out to the Friday crowd.

Discounts

Music Nova Scotia has negotiated a variety of discounts on products and services for its membership. A Music Nova Scotia membership can save you money when planning your tour or when purchasing everyday goods and services. These discounts are listed under resources on our website.

Healthcare

Music Nova Scotia, in partnership with Theriault Financial Inc, (Employee Benefit Specialists) has put together a wonderful health plan for members only through Manulife Financial. Theriault Financial is a locally owned business specializing in health plans for businesses and individuals since 1970. They have arranged 8 programs to choose from ranging from simple dental coverage to complete health, drug, and dental plans - and to top it all off - collect AirMiles while paying your premium!

As you can see, Music Nova Scotia is actively developing the music industry from grassroots education to international partnerships. All of these initiatives are a result of our members engaging with the office and informing us of their needs.

MEMBERSHIP REPORT



	Mar-11		Mar-12		Mar-13	
Membership by Genre						
	#	%	#	%	#	%
Gospel	3	0.2%	7	0.6%	6	0.4%
Adult Contemp	33	2.3%	27	2.1%	41	3.0%
Alternative	105	7.5%	104	8.2%	88	6.5%
Children's	8	0.6%	9	0.7%	7	0.5%
Classical	13	0.9%	10	0.8%	15	1.1%
Country	56	4.0%	36	2.8%	43	3.2%
Electronic	20	1.4%	13	1.0%	22	1.6%
Folk	239	17.0%	198	15.6%	229	16.8%
Jazz	86	6.1%	70	5.5%	63	4.6%
Pop	60	4.3%	51	4.0%	46	3.4%
Rock	446	31.7%	411	32.4%	379	27.8%
Urban	47	3.3%	40	3.2%	63	4.6%
World	9	0.6%	16	1.3%	27	2.0%
Other	280	19.9%	277	21.8%	333	24.4%
TOTAL	1405		1269		1362	
Membership by Classification						
Artist	1151	81.92%	1019	80.3%	1117	82.0%
Company	164	11.67%	156	12.3%	167	12.3%
Venue	19	1.35%	19	1.5%	19	1.4%
Media	11	0.78%	11	0.9%	14	1.0%
Other	60	4.27%	64	5.0%	45	3.3%
TOTAL	1405		1269		1362	
Membership by Region						
Out of Province	55	3.9%	41	3.2%	42	3.1%
Annapolis Valley	38	3.8%	42	2.9%	27	2.0%
Cape Breton	101	7.2%	82	6.5%	102	7.5%
Eastern Shore	25	1.8%	16	1.3%	26	1.9%
Fundy Shore	53	3.8%	37	2.9%	38	2.8%
Halifax-Dartmouth	951	67.7%	885	69.7%	971	71.3%
Northumberland Strait	75	5.3%	76	6.0%	60	4.4%
South Shore	107	7.6%	90	7.1%	96	7.0%
TOTAL	1405		1269		1362	
Membership Type						
Corporate	81	5.8%	92	7.2%	77	5.7%
Non-Profit	61	4.3%	61	4.8%	70	5.1%
Band	824	58.6%	709	55.9%	753	55.3%
Individual	354	25.2%	324	25.5%	348	25.6%
Student	84	6.0%	83	6.5%	80	5.9%
Small Business	1	0.1%	0	0.0%	34	2.5%
TOTAL	1405		1269		1362	

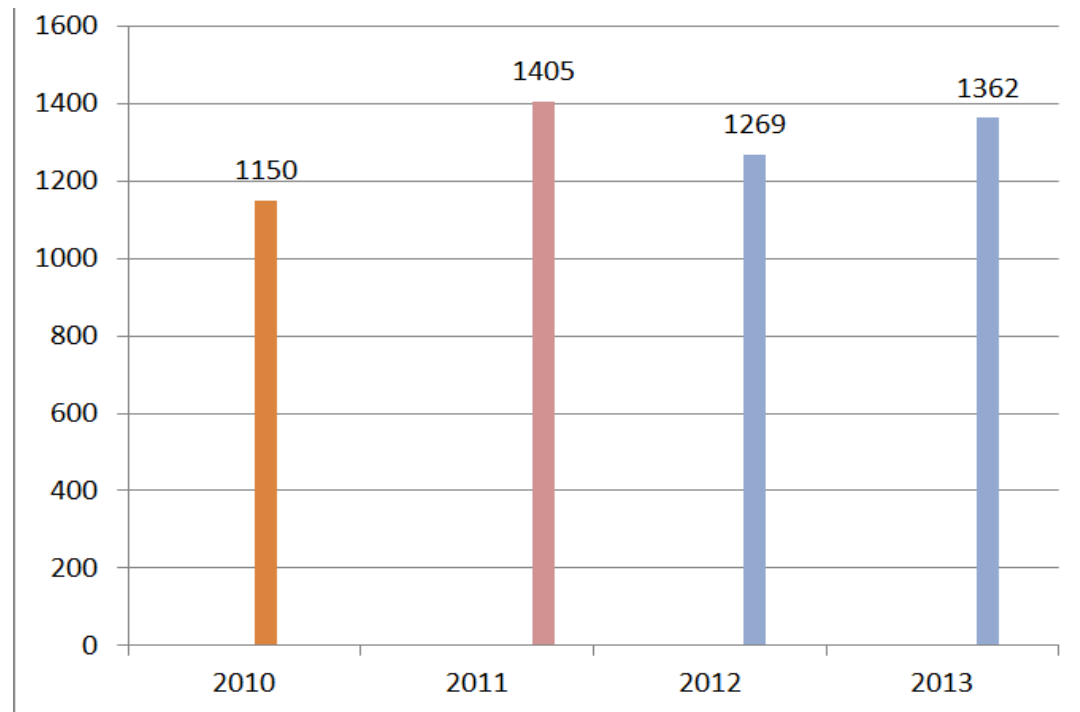
Membership Report Analysis

With 1362 individual members, Music Nova Scotia currently has the highest music industry association membership in Canada.

Total Members

March 2010	1150
March 2011	1405
March 2012	1269
March 2013	1362

Total Membership



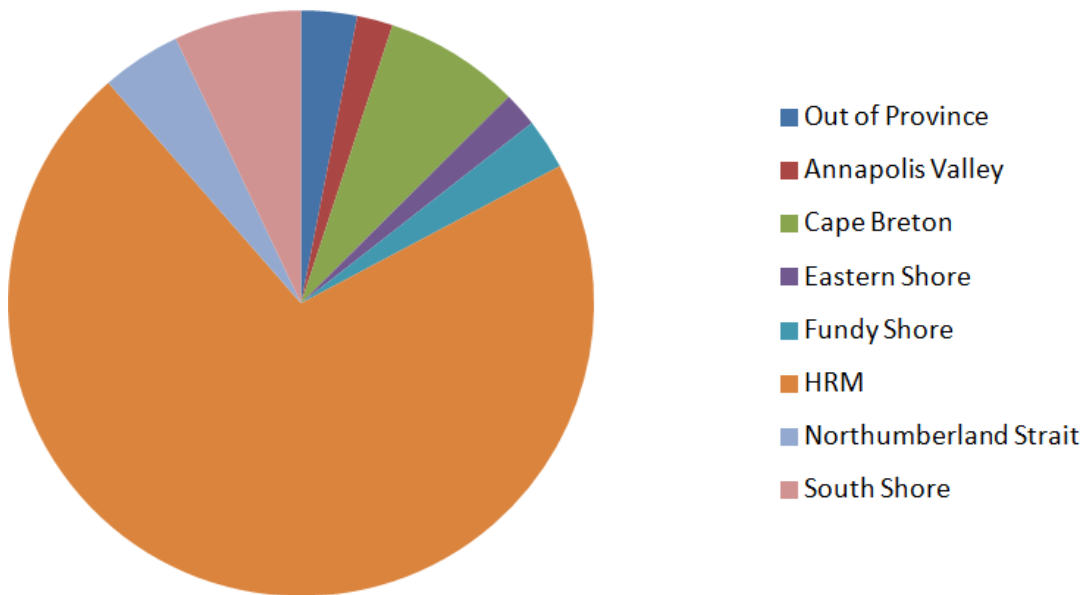
Membership by Region

Most members come from the heaviest populated region, Halifax Regional Municipality. The second highest regional draw is the Cape Breton, followed by the South Shore. Music Nova Scotia is continuously trying to attract members from all regions of the province.

Memberships by Region 2013

Out of Province	42
Annapolis Valley	27
Cape Breton	102
Eastern Shore	26
Fundy Shore	38
Halifax-Dartmouth	971
Northumberland Strait	60
South Shore	96
TOTAL	1362

Membership by Region



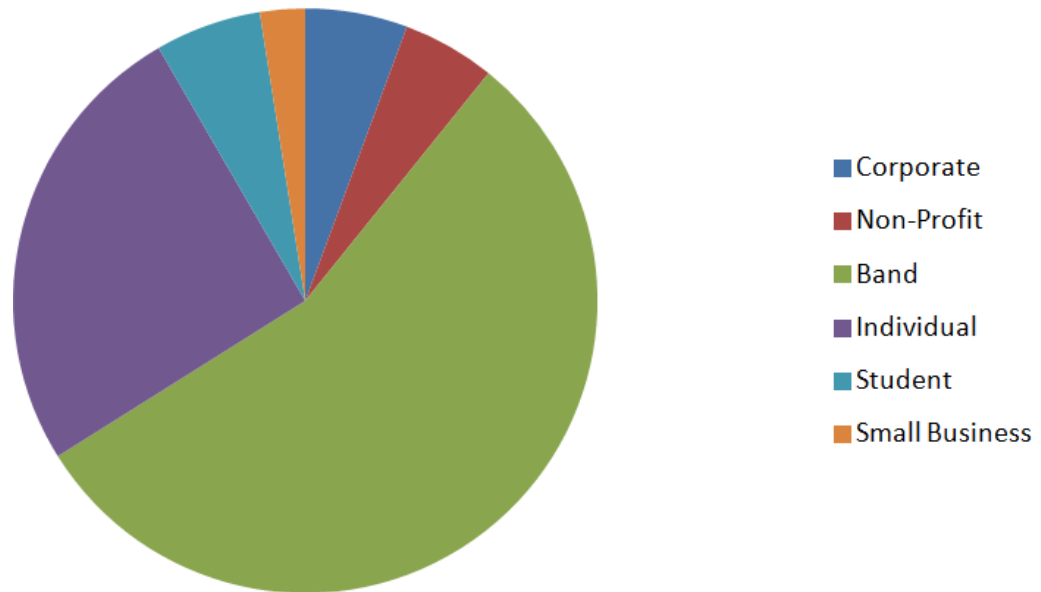
Membership Types

Music Nova Scotia implemented two new membership types in 2012, a small business membership (three employees or less) and a venue membership. These have the same benefits as a band or individual membership but better capture the nature of the business or establishment.

Membership Types 2013

Corporate	77
Non-Profit	70
Band	753
Individual	348
Student	80
Small Business	34
TOTAL	1362

Membership by Type



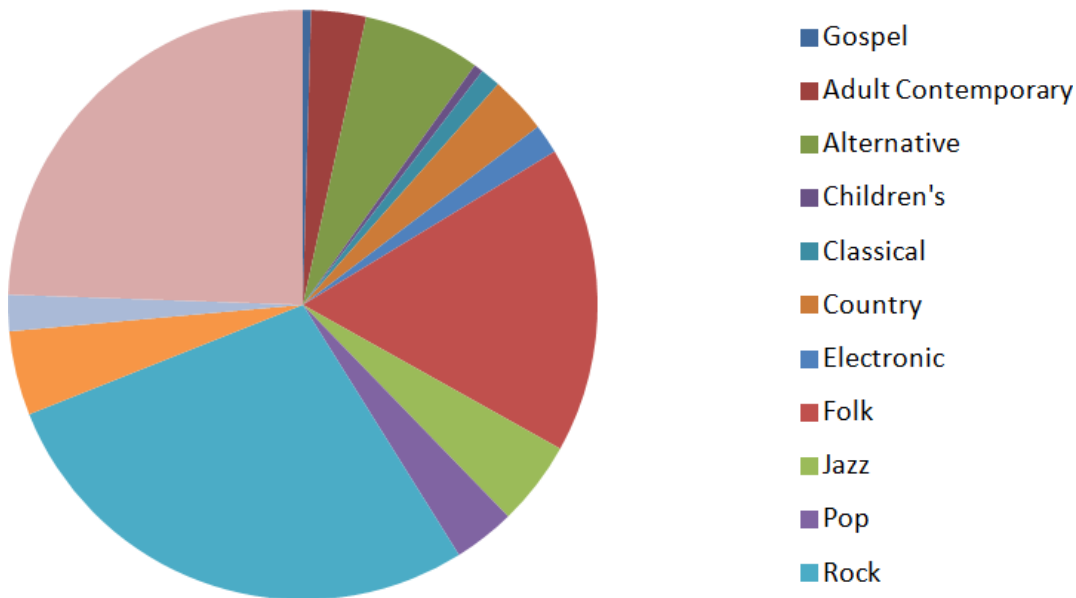
Memberships by Genre

Most artist members classify themselves in the Rock category, followed by Folk. Other memberships include businesses, venues, and any genre not included.

Membership by Genre 2013 (artist only)

Gospel	6
Adult Contemp	41
Alternative	88
Children's	7
Classical	15
Country	43
Electronic	22
Folk	229
Jazz	63
Pop	46
Rock	379
Urban	63
World	27
Other	333

Membership by Genre



MEMBER TRAINING



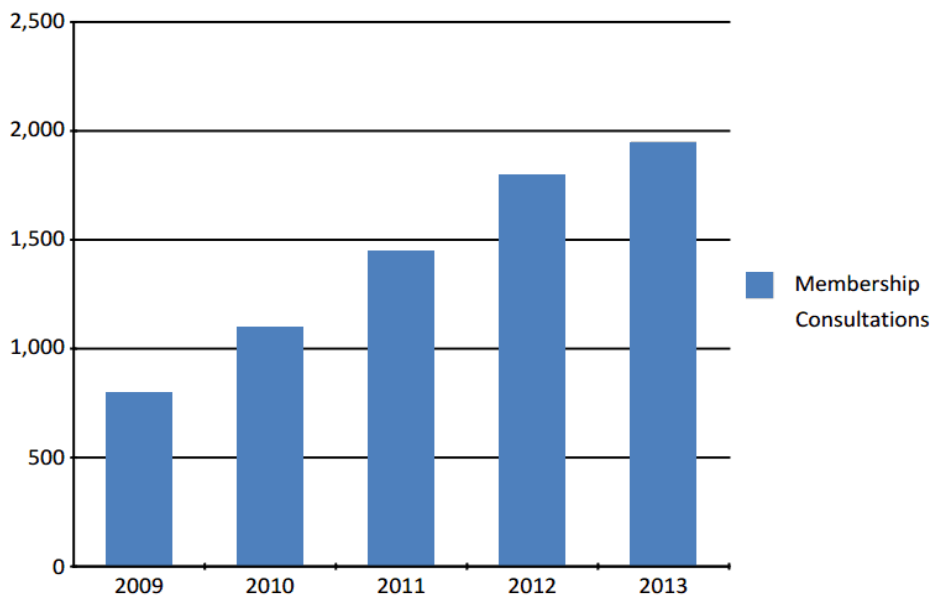
Member Training services at Music Nova Scotia consist of three strategic components:

1. **Consultations**
2. **Seminars and Workshops** (including live streaming)
3. **Ardenne Resource Centre** (including the member-only online training portal at www.musicnovascotia.ca)

Consultations

One-on-one consultations make up a large part of the member training services provided by Music Nova Scotia. Whether our members require assistance with funding information, grant-writing, career development advice, marketing plan development and execution, or information about how to break into the local live music scene, the Music Nova Scotia staff is there to provide information that helps meet the unique challenges posed by the music industry. Members are encouraged to call and set up meetings with our staff, and an increasing number are requesting recurring meetings in order to help stay on track with career goals and to ensure progress throughout the life cycles of album release campaigns or marketing initiatives. The demand for this service continues to grow exponentially each year, with new members making up a significant portion of that demographic.

Consultations

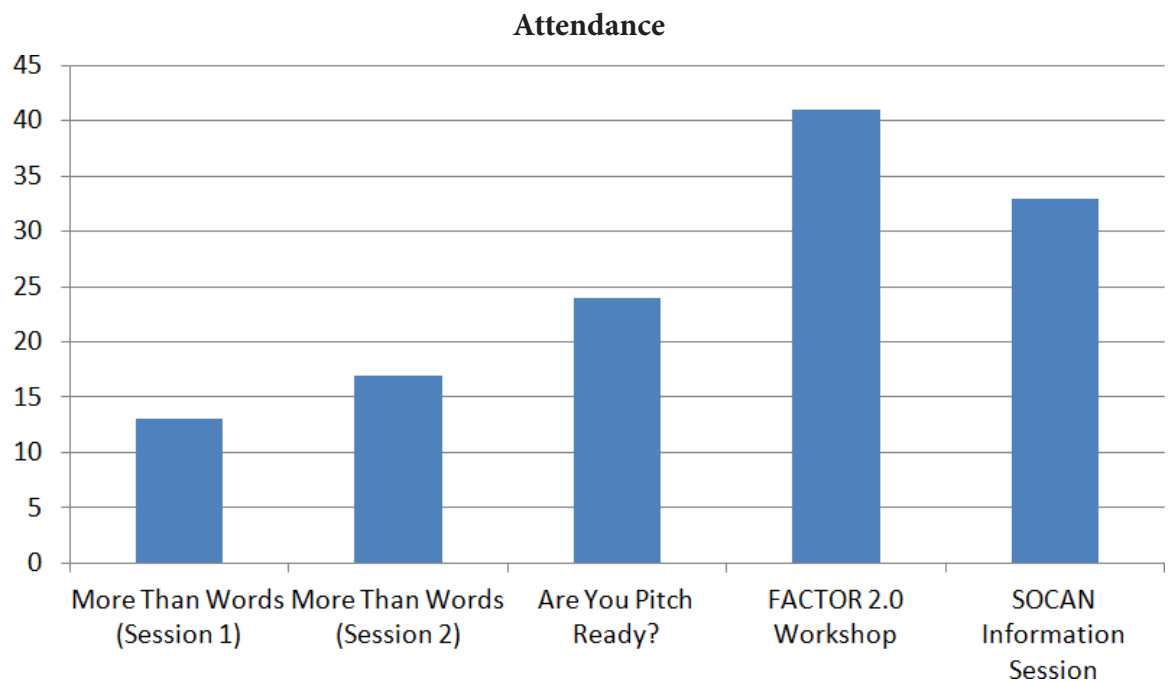


Member Training Seminars and Workshops

Member Training seminars and workshops give Music Nova Scotia members the opportunity to learn new information, develop critical skills, and engage and network with a wide variety of professionals and experts from various sectors of the music industry and related business fields. Feedback from our members continues to be very positive, with many citing these seminars as helpful in furthering their skills and understanding of these areas of the entertainment industry. Seminars and Workshops for 2012/2013 included:

- Are You Pitch Ready? - Song Pitching and Publishing Workshop (with Amy Eligh)
- SOCAN Information Session (with Tim Hardy)
- FACTOR 2.0 Workshop (with Laura Simpson)
- HUFF, SOCAN and Music Nova Scotia Present: More Than Words: Songwriting workshop with Ron Hawkins, Willie Nile, Elliot Murphy, and Steve Poltz.

Partnering with organizations such as the Songwriters Association of Canada, the Halifax Urban Folk Festival (HUFF), and SOCAN has allowed Music Nova Scotia members better access to professionals from outside the Nova Scotian music industry.



Seminar and Workshop Streaming

In keeping with the mandate of serving our membership throughout the province (or wherever they may reside), Music Nova Scotia continues to live stream our training seminars and workshops; an initiative which began in early 2011. Live streaming has proved to be an excellent way to connect and engage with our members outside the Halifax Regional Municipality. Music Nova Scotia maintains a broadcasting profile account with Ustream (www.ustream.tv); a live streaming interactive broadcast platform. This service allows us to efficiently provide online access to the seminars/workshops to any member anywhere in the province, Canada or throughout the world. The service also allows for interaction with the online audience, as it features a chat function for questions and comments which can be monitored by Music Nova Scotia staff in real time. Full social media interaction and connectivity is also a feature of the ustream service. Rural members appreciate this technology, as it allows them to remain informed and connected.

The Ardenne Resource Centre (ARC)

Centrally located in the Music Nova Scotia office, The ARC is a career and business service centre, library and archive that provides facilities, equipment, resources and professional services to Music Nova Scotia members. The center includes three computer workstations, a resource library with over 500 industry related books and trade magazines, a physical and digital archived library of music from Nova Scotia artists, and a lounge with a small meeting room for private meetings and consultations with Music Nova Scotia staff.

Since opening, the ARC has quickly become one of the most comprehensive industry tools of its kind in Atlantic Canada. The center continues to average over 10 visitors a day, and members have used the facility for everything from printing posters to writing successful grant applications.

The goal of the ARC is to increase the business skills of our membership, ensure our members have access to office equipment and meeting space, and to improve our members' skills and knowledge through the resource library. Music Nova Scotia keeps note of all artists and industry professionals who utilize the ARC and its resources. We have made digital information available to all members who cannot access the ARC due to the region they live in and continue to further increase the online training information to provide access for all members.

We have achieved great results from our investment in the ARC as we can see our overall membership continue to grow not only in numbers but also in knowledge and industry preparedness. Much of this growth is attributable to having access to information and resources which help further their careers.

Music Nova Scotia also continues to utilize our strong influence within social media networks such as Facebook and Twitter as delivery platforms for our training resources. Social media allows us to engage our membership in an interconnected and social manner. We can post articles and share educational resources and materials throughout these networks to our membership at large. Sourced from various authoritative educators from around the world, these resources act as daily and weekly educational tips. They keep Music Nova Scotia's profile front-of-mind for our members and solidify our status as a forward-thinking organization, utilizing the newest technologies to deliver our services.

Looking Ahead

The coming year will be a year of change for Member Training services at Music Nova Scotia. Our new website features a new and expanded member training section which will implement the recommendations required to meet the goals and priorities set out in the new 2013 Export Development Strategy. Our seminar/workshop series will also be developed in conjunction with these objectives. We have begun work collecting a large catalogue of new online training content, and research and distribution of new training resources continues. We are also currently researching and cataloguing databases of industry professionals and companies operating in regional, national and international markets; these will be made available to the membership through the online training portal. Member Training services will continue to provide the resources and skills training necessary for both emerging and export ready/exporting artists to achieve their goals.

INTERNATIONAL BUSINESS DEVELOPMENT

CARMEN TOWNSEND



CIMA presents
CANADIAN BLAST
AT REEPERBAHN 2012



CANADA HOUSE AT REEPERBAHN
Hörsaal (Spielbudenplatz 7)

INTERNATIONAL MATCHMAKING MEET THE CANADIANS
Reba Restaurant
THURSDAY, SEPTEMBER 20 (8:00-8:00 PM)
Pre-arranged international meetings

COMMONWEALTH VIP MIXER MEET THE BRITS & CANADIANS
Canada House
FRIDAY, SEPTEMBER 21 (8:30-7:45 PM)
Presented in association with UK Trade & Investment (UKTI) and the Embassy of Canada in Berlin.

CANADA HOUSE SHOWCASES

FRIDAY, SEPTEMBER 21
Canadian Blast presents
1:00 PM **ALEX CUBA** (Caracas)
Manitoba Music presents
1:45 PM **DEL BARBER** (Papua)
2:30 PM **CANNON BROS.** (Dissimination)
Canadian Blast presents
3:15 PM **THIS SOUND WILL SAVE YOU** (Poggona)
Music Nova Scotia presents
4:00 PM **WINTERSLEEP** (Sonic Entertainment)
Canadian Blast presents
4:45 PM **SAIDAH BABA TALIBAH** (CLK Creative)
5:30 PM **ZEUS** (Arts & Crafts)
Canadian Music Week presents
8:15 PM **MODE MODERNE** (Light Organ)
9:00 PM **TWO HOURS TRAFFIC** (Blumstead)
9:45 PM **SOCALLED** (Bare to Care)

SATURDAY, SEPTEMBER 22
Canadian Blast presents
1:45 PM **INCURA** (Coalition)
2:30 PM **STONE RIVER** (Gypsy Soul)
3:15 PM **JONAS & THE MASSIVE ATTRACTION** (Dissimination)
4:00 PM **THE DUSTIN BENTALL OUTFIT** (Aperis)
Sask Music presents
4:45 PM **FOAM LAKE** (Aperis)
5:30 PM **SLOW DOWN, MOLASSES** (Southern Bird)
Canadian Blast presents
8:00 PM **MODE MODERNE** (Light Organ)
8:45 PM **TWO HOURS TRAFFIC** (Blumstead)
9:30 PM **BEN CAPLAN** (Audio Blood Coalition)

canadianblast.com | @canadianblast | facebook.com/canadianblast | cimamusica.ca

MUSIC NOVA SCOTIA PRESENTS
BANGERS & MOSH
BRUNCH & SHOWCASE AT THE GREAT ESCAPE

BRUNCH SERVED 12:00PM - 1:00PM
THE TOWN HEROES 1:00PM - 1:30PM
BEN CAPLAN 2:00PM - 2:30PM
& THE CASUAL SMOKERS
RICH AUCOIN 3:00PM - 3:30PM

music NOVA SCOTIA
Friday, May 11th
Canada House @ The Blind Tiger Club
(formerly Hector's House) 52-54 Grand Parade, Brighton

NOVA SCOTIA Communities, Culture and Heritage | [music NOVA SCOTIA](http://musicnovascotia.ca) | web: musicnovascotia.ca | [twitter: @musicnovascotia](https://twitter.com/musicnovascotia)

music NOVA SCOTIA

NOVA SCOTIAN ARTISTS @ ECMA 2012

Alert the Medic - Ambition
Andrew Hunter & The Gatherers
Aselin Debison - Banded Stilts
Ben Caplan & The Casual Smokers
Bonnie Ste. Croix
Breagh MacKinnon
Brooke Miller - Carleton Stone
Carmen Townsend
Cassie & Maggie MacDonald
Charlie ACourt - Christina Martin
Classified - Coco Love Alcorn
Crowd's Bridge - Cynidi Cain
David Myles - Dezza
Dylan Guthro - Erin Costelo
Ghettochild - Ghetsocks
Gloryhound - Gypsyophilia
In Flight Safety - Irish Mythen

Jimmy Rankin - John Mullan
Joseph Edgar - Keith Mullins
Kim Dunn - Kim Wempe
Lennie Gallant - Luc Tardif
Matthew Hornell - Meaghan Smith
Mo Kenney - Molly Thomason
Norma MacDonald
Old Man Luedecke - Radio Radio
Rain Over St. Ambrose - Ria Mae
Rose Cousins - Scientists of Sound
Shelter with Thieves - Slowcoaster
Something Good - Sprag Session
Stephen Fearing - Stone Mary
The Mountains & The Trees
The Stanfields - The Town Heroes
Three Sheet - Tom Fun Orchestra
Universal Soul

MUSICNOVASCOTIA.CA

MOBILE WEB APP
SCAN THIS QR CODE
TO FOLLOW YOUR FAVORITE
NOVA SCOTIAN ARTISTS
AT ECMA 2012

NOVA SCOTIA Communities, Culture and Heritage

NOVA SCOTIA @ SXSW
{day showcase}

BEN CAPLAN
DUSTED
TOM FUN ORCHESTRA
JENN GRANT

Presented by **HalifaxPopExplosion**
@HalifaxPop
#NS5dayshow

Friday March 16th, 2013
Experience Nova Scotia's finest exports: music, seafood and culture at South by Southwest 2013.
The Nova Scotia Showcase will feature 3 secondary artists: Nova Scotia seafood and hospitality so if you're ready to be refreshed and experience the best Nova Scotia has to offer RSVP today.

This event is open to business delegates and invited guests only and space is very limited so don't delay

- 12:00 - Jen Grant - jengrant.com
- 12:15 - In Flight Safety - indigoflight.ca
- 12:30 - Ben Caplan - benocaplan.ca
- 1:45 - Dusted - dustedlive.com
- 2:15 - Tom Fun Orchestra - tomfun.ca

Ben Caplan - Down to the River | Live in Bellini

In The Belly Of A Dragon

Friends Bar (Canada House)
208 East 9th Street, Austin, TX 78701
Mar 15
12:00pm - 5:00pm

Contact the Event Organizer

In partnership with:

NOVA SCOTIA COMMUNITIES, CULTURE AND HERITAGE

MUSIC NOVA SCOTIA @ EAST COAST MUSIC WEEK

FRIDAY
Mo Kenney
Thom Swift
Paper Beat Scissors
Troy MacGillivray
Tom Fun Orchestra
Gloryhound

SATURDAY
Dylan Guthro
Erin Costelo
Soho Ghetto
Ghetto (formerly Ghettochild)
The Town Heroes
AA Wallace

SEAHORSE TAVERN
MARCH 8th & 9th @ 9PM

music NOVA SCOTIA

DELTA HOTELS AND RESORTS PRESENTS

TIKI Lounge

Saturday, March 23
The Rivoli
334 Queen St. West
Doors Open 5:00pm - 5pm

NOVA SCOTIA COMMUNITIES, CULTURE AND HERITAGE

Featuring:

- 6:00 JENNAH BARRY
- 6:25 WILLIE STRATTON
- 6:50 GABRIELLE PAPHILON
- 7:20 DYLAN GUTHRO
- 7:45 PAPER BEAT SCISSORS
- 8:15 OLD MAN LUEDECKE
- 9:00 THE MODERN GRASS
- 9:45 HEATHER GREEN
- 10:30 BULLIE DIE & THE POOR BOYS
- 11:15 DANGER BEES
- 12:00 THE TOWN HEROES
- 12:45 GLORYHOUND
- 1:30 COUSINS

Music Nova Scotia Export Strategy

Executive Summary

March 2013

Prepared by:

Sound Diplomacy

and

Nordicity



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The study was prepared by Sound Diplomacy and Nordicity

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Sound Diplomacy (sounddiplomacy.com) is a THINK and DO tank specializing in cultural export, event production, brand management, research and analysis.

Nordicity (nordicity.com) is a powerful analytical engine with expertise in strategy and business, evaluation and economics, policy and regulation for the arts, cultural and creative industries. Because of Nordicity's international presence, it has become widely recognized for its ability to translate developments and best practices between markets for the private, public and third sectors.

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Music Nova Scotia Export Strategy – Executive Summary

1. Introduction

1.1 Mandate of the Music Nova Scotia Export Strategy:

The mandate of the Music Nova Scotia Export Strategy is to help Nova Scotia artists and music businesses more effectively reach international markets and increase exports. The two main objectives that support this mandate are (i) Increase the amount of new exporters, and (ii) Diversify the level of existing exporters. Success in doing so would lead to greater and more diversified revenues, which would increase the health and sustainability of Nova Scotia’s music industry.

Mission Statement of the Music Nova Scotia Export Strategy:

Music Nova Scotia aims to lead and support the export capacity of Nova Scotia artists and music businesses.

Rationale for the Music Nova Scotia Export Strategy:

The Export Strategy (the “**Export Strategy**”) aims to support Music Nova Scotia’s organization mission as outlined in the 2007 *Music Nova Scotia Music Sector Strategy* in the following ways:

- To encourage “*creation, development, growth and promotes the music industry of Nova Scotia*”.
- To advance its Vision as “*the leading center for independent music in Canada*”
- To be “*recognized as a global center of creation and professional excellence and with all of our communities participating and benefiting in the music.*¹”

Following the mandate and in order to achieve these two objectives, the Music Nova Scotia Export Strategy recommendations are presented in **four subject categories**.

1. Market Research and Industry Intelligence
2. Business Skills and Training
3. Initiatives (Conferences and Festivals)
4. Export Readiness and Execution (Evaluation)

¹ Music Nova Scotia. The 2007 Nova Scotia Music Sector Strategy. (2007)

1.2 Methodology

Sound Diplomacy and Nordicity developed the Strategy in close consultation with Music Nova Scotia. Building upon the *2007 Nova Scotia Music Sector Strategy*, a series of meetings with Music Nova Scotia were held to determine the industry's current and future needs to ensure the strategy remains effective over the next three years from 1 April 2013 to 31 March 2016.

A literature review of sector trends and export strategy best practices was undertaken. In addition, a series of key informant interviews was undertaken with music industry professionals from Nova Scotia and the targeted international markets identified in the export strategy. Based on these findings, a set of activities, tasks and key contacts is presented that helps articulate the export strategy and define its implementation.

1.3 Context

The music industry in Nova Scotia is an important contributor to the social and economic well-being of the province. The arts and cultural industries generate nearly \$1.2 billion, and employ 28,000 Nova Scotians.² Nationally, the direct value of Canada's creative economy is estimated at over \$40 billion per year.³ The Canadian recording industry contributes an estimated \$277.2 million to Canadian GDP, employing 4,146 jobs.⁴ More directly relevant to Nova Scotia given the independent nature of its sector, the Canadian independent music industry contributes \$333 million and for every \$1 of industry revenue, the sector generated \$0.26 in indirect and direct tax revenue for the federal and provincial coffers in 2011⁵.

1.4 Key Recommendations for Music Nova Scotia:

The following summative recommendations provide an overview of the Strategy in general. Detailed recommendations for the strategy are found in Section 3 (Recommendations).

² Percy Paris, Minister of Economic and Rural Development and Tourism, Government of Nova Scotia. (30 November 2012) <http://novascotia.ca/news/smr/2012-11-30-Creative-Economy/>

³ Valuing Culture: Measuring and Understanding Canada's Creative Economy, Conference Board of Canada (26 August 2008)

⁴ Economic impact analysis of the sound recording industry in Canada. Music Canada (12 April 2012)

⁵ Sound Analysis; An examination of the Canadian independent music industry, Canadian Independent Music Association (February 2013).

- Adopt a cohesive approach to export initiatives with a long-term and holistic method of supporting artists and music businesses.
- Actively seek out artists and music businesses with export potential to support under Music Nova Scotia membership.
- Consult regularly with the industry and its membership more specifically to remain current to local needs and to export best practices.
- Facilitate further knowledge transfer and best practice sharing among industry and members.
- Continue expanding and enhancing industry workshops and business development activities.
- Establish and market itself locally as the *go to* body for music and related cultural exports in Nova Scotia.
- Compile and leverage export activity data for market intelligence, strategic decision-making, program evaluation and reporting.
- Lead export initiatives through Nova Scotia Music Week (as a brand).
- Develop partnerships and manage relationships and contacts across all sub-sectors of the music industry in targeted export markets.
- Engage more effectively with secondary markets such as synchronization, video games and advertising.

We see Germany and potentially the UK as fertile territories (in comparison to the US) for us to invest our time and resources.

Ian McKinnon, GroundSwell Artists

2. Market Overview

2.1 Global Market

The global recorded music industry was worth an estimated \$16.6 billion in 2011,⁶ and while these numbers dropped 3% from the prior year, the industry is in a state of flux with new opportunities emerging out of structural industry changes through new and emerging business models. These developments can have a positive impact on smaller, independent music industries such as Nova Scotia's.

Brought on or thrust by the impact of digital technologies on music production, distribution, revenue and management, there has been an industry shift away from major record labels and the rise of the artist entrepreneur, project managers and independent music businesses.

Germany and the United Kingdom (UK) are the third and fourth largest music markets respectively, after the United States (US) and Japan. Each presents some of the greatest opportunities for Nova Scotian artists and music businesses. As per the table below, Austria and Switzerland each present formidable revenue opportunities, particularly considering the relevance with the German market.

Meanwhile, India, and to a lesser degree China, both present smaller opportunities in terms of present day revenues, but have tremendous potential in the medium to long term. As emerging markets, investing in India and China is something every well-coordinated Canadian provincial music sector should consider.

Table 1 - Global music industry market share data (2010) - Music markets, with total units sold in various categories, total retail value, and population of market region

Market	Singles (M)	Albums (M)	DVDs (M)	Total units (M)	Retail value US \$ (M)	Population (M)
Germany	6.8	98.7	8.7	114.2	1,713.6	82.3

⁶ Recording Industry in Numbers. IFPI (26 March 2012)

UK	2.4	99.8	3.5	105.7	1,388.1	62.3
Canada	0.2	25.9	2.7	28.8	343.2	33.7
Austria	0.1	7.5	0.7	8.3	184.1	8.2
Switzerland	0.3	8.4	0.2	8.9	166.1	7.7
India	3.9	35.5	0.3	39.7	91	1,173.1
China	-	4.1	0.1	4.2	23.2	1,336.7

Source: Figures within the table are based on IFPI 2010 annual digital report⁷. Total units figures are derived by addition of figures reported by referenced sources.

2.2 Nova Scotia – Market Overview

Nova Scotia is most widely recognized nationally and internationally for its folk and traditional music. Indeed, Cape Breton is internationally renowned as a centre for Celtic and Gaelic music, and produced acclaimed artists such as The Rankin Family and Natalie MacMaster. It is also home to the world famous Celtic Colours Festival. In addition, Nova Scotia also has a long history of popular music, as far back as the 1930s with Hank Snow to Anne Murray, April Wine and Sarah McLachlan decades later. Today and since the 1990s, however, Nova Scotia has had a renaissance with acts such as Sloan, Slowcoaster, Wintersleep, Rose Cousins, Old Man Luedecke, Ben Caplan and The Town Heroes. New acts including Cousins, AA Wallace and The Stanfields are currently exporting into these export markets.

Nova Scotia has proven to be a cultural hotbed capable of developing new and emerging musical talent. It is also home to some of Canada’s most established music festivals, including the aforementioned Celtic Colours and Halifax Pop Explosion. It also enjoys one of Canada’s most developing music conferences, in Nova Scotia Music Week (NSMW).

With a population of just under one million, artists and music businesses must expand to reach larger markets outside of the province. While the first markets often explored by Nova Scotians are other Canadian provinces and territories, in order to grow one’s business and

⁷ IFPI 2010 Annual Report, International Federation of Phonograph Industries. Last Accessed 25 March 2013. (<http://www.ifpi.org/content/library/dmr2010.pdf>)

become sustainable, artists and music businesses must develop fans and audiences in larger international markets, including Germany and the UK.

There are several natural markets for Nova Scotian artists and music businesses to explore given historical and contemporary connections, including the UK, Germany, Austria and Switzerland. From the very founding of the province of Nova Scotia, there has been a strong cultural and commercial connection with the United Kingdom, and with the Celtic culture and Gaelic language in Scotland in particular. Lasting centuries, these connections continue to thrive today. Germany, meanwhile, presents significant opportunities for Nova Scotia’s artists and music businesses as a strong import market with an established live sector. By proxy, the Austrian and Swiss markets present supplementary opportunities as sizeable neighbouring markets that can leverage one’s German infrastructural development.

Nova Scotia has a strong network of music industry support structures funded through provincial and national bodies. Music Nova Scotia administers an Export Development Program (EDP) to financially support Nova Scotian artists and music businesses in reacting quickly to export opportunities. It also administers the Bringin’ It Home Community Presenters Assistance Program (BIH), to create opportunities to present Nova Scotia artists domestically. Other initiatives include a weekly concert series in cooperation with Casino NS, Halifax. The Government of Nova Scotia’s Emerging Music Business Program provides financial assistance to musicians and those pursuing music industry careers with an aim to enhance their sales, marketability and business skills. In addition, a number of relevant industry development programs are available on a national level, such as FACTOR, Canada Council for the Arts and Radio Starmaker Fund as well as export initiatives, including Canadian Blast.

What the UK music market means for Nova Scotia’s music industry

- Strong opportunity for business-to-consumer revenues.
- Recorded music market is declining, but continued growth in digital revenues (including streaming and social media) presents an opportunity due to the UK’s advanced growth in streaming services and popularity.
- More opportunities for independent project management and label services are developing over traditional licensing arrangements.
- The UK market is changing, much like the global sector, but significant opportunities remain.
- The UK has an influence over the rest of Europe in terms of promotional capacity.

What the Germany (Austria and Switzerland) music market means for Nova Scotia’s music industry

- Germany is one of the strongest import markets in Europe – domestic labels actively license foreign content.
- Germany has influence over Austria and Switzerland, where domestic success in Germany is often replicated elsewhere.
- Germany has one of the most active touring and festival markets in Europe.
- Live revenues present the greatest opportunity
- Plans should give consideration towards leveraging potential opportunities in Belgium, Slovenia and the Netherlands.
- Plans should consider Switzerland festivals as a key export initiatives and targets, but incorporate release and marketing strategies through their German partners.

What the India music market means for Nova Scotia's music industry

- Revenue possibilities are developing in the live sector.
- Traditional copyright structures are not yet effective, but this is improving slowly.
- Festivals are important anchor dates for artists, as festivals often occur in multiple cities.
- Mobile content is a significant platform for music consumption.

What the China music market means for Nova Scotia's music industry

- Engagement should focus on content availability through local aggregators (on local devices) and live opportunities.
- However, expectations for standard performance and license fees should be lessened as infrastructure concerning copyright, live touring and production is small. This is improving, but not extensively.
- Industry infrastructure is centered on the two major cities, Shanghai and Beijing. Both have potential opportunities through independent club nights, festivals and media.

3. Recommendations

A series of recommendations have been developed to address the needs of Nova Scotia artists and music businesses and support Nova Scotia’s Mission to encourage “creation, development, growth and promotes the music industry of Nova Scotia” and advance its Vision as “the leading center for independent music in Canada, recognized as a global center of creation and professional excellence and with all of our communities participating and benefiting in the music”.⁸

The recommendations are presented four categories, and are relevant across each of the targeted export markets:

- Market Research and Industry Intelligence
- Business Skills and Training
- Initiatives (Conferences and Festivals)
- Export Readiness and Execution (Evaluation)

3.1 Market Research and Industry Intelligence

It is important for Music Nova Scotia to understand distribution channels (physical, digital, tertiary) in the targeted export markets. This will enable Music Nova Scotia to advise its members, invite key buyers to events, organize meetings and service its core mandate. This encapsulates all distribution formats, from physical to digital, streaming services, video aggregation, brands and independent music retail.

Recommendations

- Develop and maintain a contact database of physical distribution companies, including A&R, label management and marketing contacts.
- Maintain a database of artist showcasing opportunities.
- Build a contact database and establish relationships with independent music retail (physical and digital) in exports markets to facilitate introductions for members.

⁸ Music Nova Scotia. The 2007 Nova Scotia Music Sector Strategy. (2007)

3.2 Business Skills and Training

It is important for Music Nova Scotia to understand what the buyer is looking for, so it can best communicate to its members and offer quality education and business development training.

(Bands) need to be ready to head to a different market. They should have some element of a team in place - perhaps management, lawyer, maybe an agent, a label or a publisher.”

Jules Parker, Membership Development and UK Promoter, PRS for Music

Recommendations

- Develop pitching strategies and templates for acts and labels.
- Support members with business development training. Every band and label is an SME, and this will lead to a growing ‘Music Mittelstand’⁹ in Nova Scotia, with more sustainable artists and businesses.
- Create an “export ready skills academy” with a set of courses designed to foster business development.
- Create a simplified and user-friendly export portal to showcase member content.
- Integrate Nova Scotia Music Week as the lead domestic showcasing event on the export portal.
- Be at the forefront of social media training. ‘If it is not online, it didn’t happen.’
- Encourage artists to submit social media strategies in all EDP applications.
- Make resources available on the Music Nova Scotia mobile app.

⁹ ‘Mittelstand’ is the term for the large amount of small-to-medium sized companies that support the German economy. They are referred to as the “engine of the German economy” by Germany’s Ministry of Economics and Technology.

Case Study: In-Flight Safety

In 2010 and 2011, **In-Flight Safety** invested its resources in the UK and Germany. They licensed their sophomore release, *We Are an Empire, My Dear*, to independent German label Waggle Daggel and Conehead/Universal (UK). Together the band and label(s) invested in promotional teams (in each territory) to market the release. Booking agents were sourced (to facilitate live performance opportunities (Target Concerts – Germany, CODA – UK, Doublevee Concerts, Netherlands). The album, released two years prior in Canada, garnered the following accolades:

- A 'B List' placement on BBC Radio 2. This equates to 3-5 plays guaranteed per day to 14 million listeners.
- A headline tour of Germany, Austria and the UK.
- A sold out performance in Innsbruck, Austria at the Weekender Club.
- Showcasing opportunities at The Great Escape (UK) and Liverpool Soundcity (UK).

While this growth produced tangible success, it did not result in the act turning a profit in either market. However, through Music Nova Scotia's Export Development Program (EDP) and FACTOR support, In-Flight Safety were able to support this investment, strengthening their relationships in each market and solidifying their infrastructure development for a follow-up release.

In-Flight Safety's career has blossomed as a result of these international endeavours. It is important to note these activities were facilitated strategically, and with significant investment. Because the band followed the path of a carefully managed business plan, they are poised to expand these activities and market share in the UK and Germany.

Success stories such as these are good examples of return on investment for Nova Scotia when it works with its members to prepare for the costs, expectations and challenges outlined by John Mullane.

The UK and Germany are extremely important to us. We have always felt that we had a universally accessible sound that could cross over... The fact that we were embraced by radio in UK (in particular BBC Radio) was eye opening and inspiring. It also highlighted that we have to work even harder on the recorded music/live show to grow it. It raised the bar beyond the local scene.

It is still difficult to profit in the UK and Germany as In-Flight Safety. We invested capital there for future dividends as we did in Canada when we started. The costs to bringing a band to the UK and Germany are astronomical, so we had no expectations of making money. Most of the money we made came from radio play in the UK. Therefore, without MUSIC NOVA SCOTIA's funding and help from FACTOR, these trips to start planting seeds and building our business would, simply put, not be possible.

John Mullane, In-Flight Safety

3.3 Initiatives (Tours, Conferences and Festivals)

It is important for Music Nova Scotia to be strategic in its tours, conferences and festivals initiatives. Strategic planning, delivery and follow-up with a long-term view will most effectively serve the Music Nova Scotia export strategy mandate. Recommendations to support this include:

Recommendations

- Research, prioritize and attract key industry members from international markets to Nova Scotia for strategic meetings, flagship and other industry events.
- Develop a 36-month strategy outlining the Nova Scotia buyer program for flagship events.
- Focus initiatives on markets with existing relationships (and consider maintaining a three-year cycle for revisiting these markets).
- Develop a three-year showcasing and festivals strategy.
- Engage local industry experts for initiative preparation, delivery and follow-up support (booking, PR, market research).
- Leverage the Nova Scotia brand to develop relationships and initiatives with complementary sectors (i.e. other creative industries, hospitality, transportation).
- Develop private-sector partnerships.

- Enhance initiatives with music supervisors.
- Develop export guides for artists and music businesses.
- Share industry best practices and facilitate knowledge transfer.

By separating Music Nova Scotia and Nova Scotia Music Week as distinct online and offline properties, it will enable a brand (NSMW) to develop a voice as a festival while retaining neutrality and transparency for Music Nova Scotia as an association.

3.4 Export Readiness and Execution

Export readiness and execution is an integral element of music industry development. Key strategies of export development take into consideration market specific predictions from a Nova Scotia context for the years 2013-2016.

- Encourage artists to have a variety of ‘assets’ and touch points available for distribution (i.e. images, videos, free downloads, stems for publishers, a strong website).
- Promote successful artist partnerships to encourage more artist-centric cooperation (i.e. Ben Caplan’s partnership with Katzjenhammer).
- Highlight the usefulness of financial support applications and reporting for artist and music business planning and Music Nova Scotia evaluation
- Enhance publicity celebrating Nova Scotia successes
- Share industry best practices and facilitate knowledge transfer among Music Nova Scotia members

4. Conclusion

This strategy is developed to ensure that Music Nova Scotia and its members (businesses and artists) can develop prosperous and lasting relationships in the UK, Germany (Austria and Switzerland). With a renewed focus on business development training, knowledge transfer, research and online expertise, Music Nova Scotia will continue to be a leading music industry organization, from export initiatives to festival coordination, research and analysis.

Sound Diplomacy

Sound Diplomacy (www.sounddiplomacy.com) is a THINK and DO tank specializing in cultural export, event production, brand management and research and analysis.

For more information, contact info@sounddiplomacy.com

Nordicity Group Ltd.

Nordicity (www.nordicity.com) is a leading international consulting firm providing private and public sector clients with solutions for Strategy and Business, Economic Analysis and Evaluation, Policy and Regulation across the creative, technology and innovation sectors.

For more information, contact info@nordicity.com

Report by Sound Diplomacy and Nordicity. NGL13-03-31



TECHNOLOGY

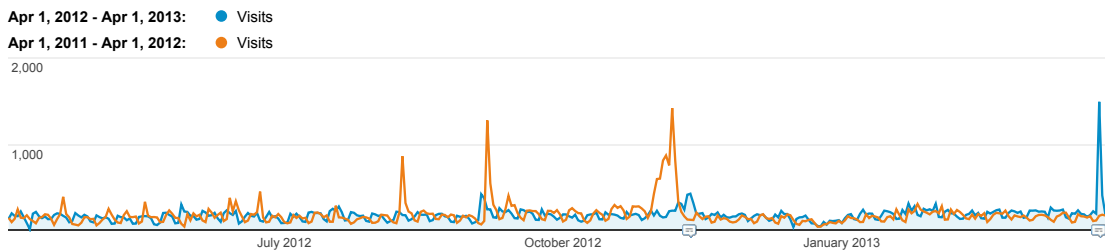


JOEL PLASKETT EMERGENCY

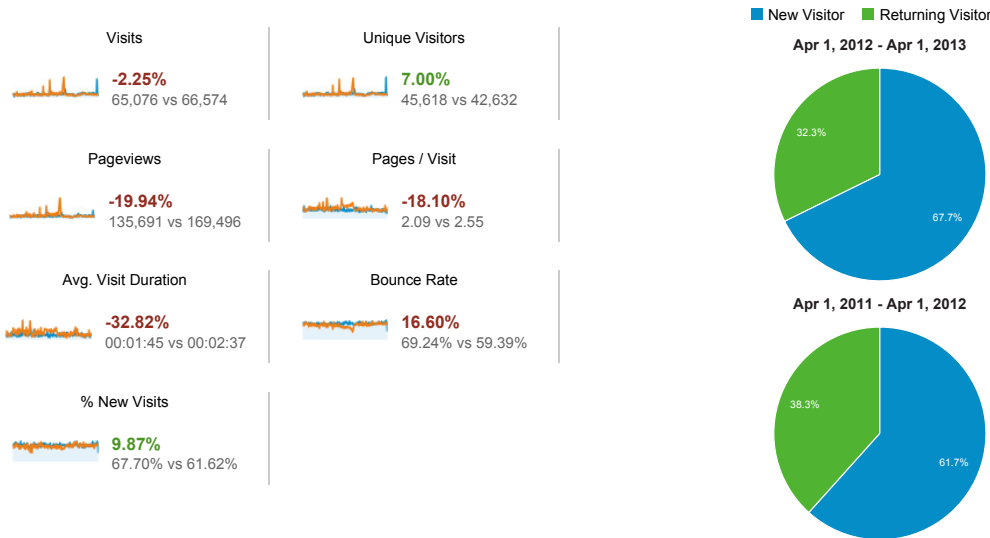
Website

Right up until the end of its operating lifespan, the previous version of musicnovascotia.ca continued to be an important resource for our members. Unique traffic is up vs. last fiscal year, although total page loads are down slightly as we continue to put more emphasis on social media. Traffic spikes occurred around Nova Scotia Music Week press releases, the weekend of Music Week itself, and the Juno awards, with almost 1500 visits the night of the awards show. Traffic relating to Music Week is down considerably, as the festival had its own dedicated web presence this year.

The migration to the new website went well, all things considered. Powered entirely by open-source software (CiviCRM/Drupal), it's extremely customizable and much easier to integrate with the services and software we already use, like MailChimp, Podio, and Marcato. Members started logging in right away to populate their new user profiles, songs, news, and events.



45,618 people visited this site



Podio

We've settled in with Podio and it has become a critical tool for workflow management, member engagement, and web publishing. We rely on its webforms for quick, easy, and reliable data intake for everything from RFPs to New Music Fridays applicants. The entire EDP and BIH application processes are now in a series of inter-related Podio forms; this is probably our single biggest success with this platform.

This year's NSMW critical path is a Podio app, where each deliverable has component Tasks that are assigned to the relevant employee. Most non-schedule logistic information that gets published to NSMW.ca - accommodations, guest delegates, conference speakers - comes out of Podio in real time, so as soon as we confirm a hotel or delegate, their info can be made available on NSMW.ca instantly, easily, and accurately.

Marcato

Marcato continues to grow and improve, and is the intake point for NSMW showcase submissions and award nominations. The festival and conference schedules - as well as the venue info - all are published to NSMW.ca with a Marcato XML feed. The raw text of the program guide was generated from Marcato XML this year, as were the mobile web apps for Music Week, CMW, and ECMA. We also use it on an ongoing basis to program and manage New Music Fridays.

MailChimp

We continue to manage our newsletter mailing list - as well as crucial VIP delegate contact lists for trade missions/showcase like the Tiki and Bangers & Mosh - with the ever-popular MailChimp. This year we will be switching to user-driven newsletter submissions using a Drupal-published RSS feed from the website that populates an RSS campaign. The newsletter is already self-archiving on the new musicnovascotia.ca with minimal user input required.

Box

Our cloud storage solution of choice, Box has become essential for data archiving as well as file distribution, especially for servicing design files to our partners (Casino NS etc.) and printers. As the staff expands and contracts with the yearly cycle of Music Week and its accompanying JCP jobs, Box proves its worth in making it easy and intuitive for a variety of staffers to work on the same files with security and revision control in place.





MOLSON CANADIAN NOVA SCOTIA MUSIC WEEK 2012



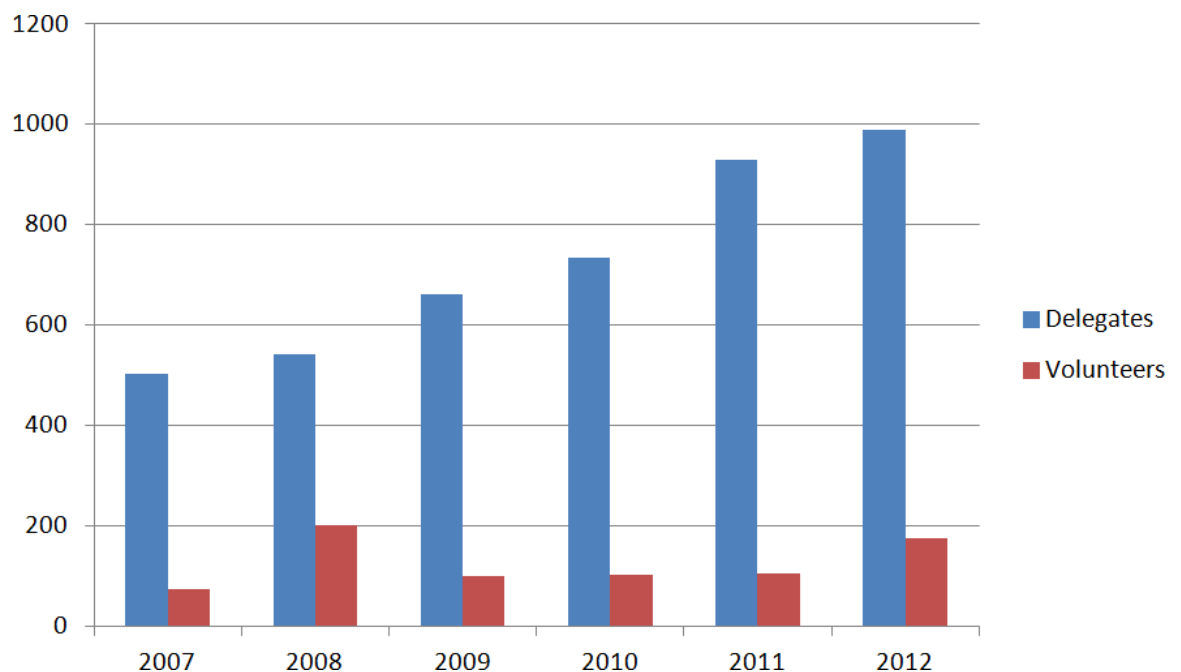
DAVE GUNNING

Molson Canadian Nova Scotia Music Week – Liverpool 2012 – Nov. 8-11

Each year, since the inception of Nova Scotia Music Week in 1997, the music community of Nova Scotia has gathered together to participate in a range of showcasing, training and networking opportunities while honouring and celebrating our artists and industry professionals. Nova Scotia Music Week has engaged the Music Nova Scotia membership and music industry at large while showcasing emerging and established artists to the public.

In keeping with the mandate to make it a community-based event, the 15th annual Nova Scotia Music Week returned to Liverpool with events hosted in the town of Liverpool and the surrounding area of White Point Beach. This year's host committee was comprised of volunteers from the local community backed by the Region of Queens Municipality and the local chamber of commerce. They, along with the Music Nova Scotia music week staff and the 175 volunteers were successful in planning and delivering yet again the largest edition of the event to date.

Delegate and Volunteer Registration NSMW 2007-2012

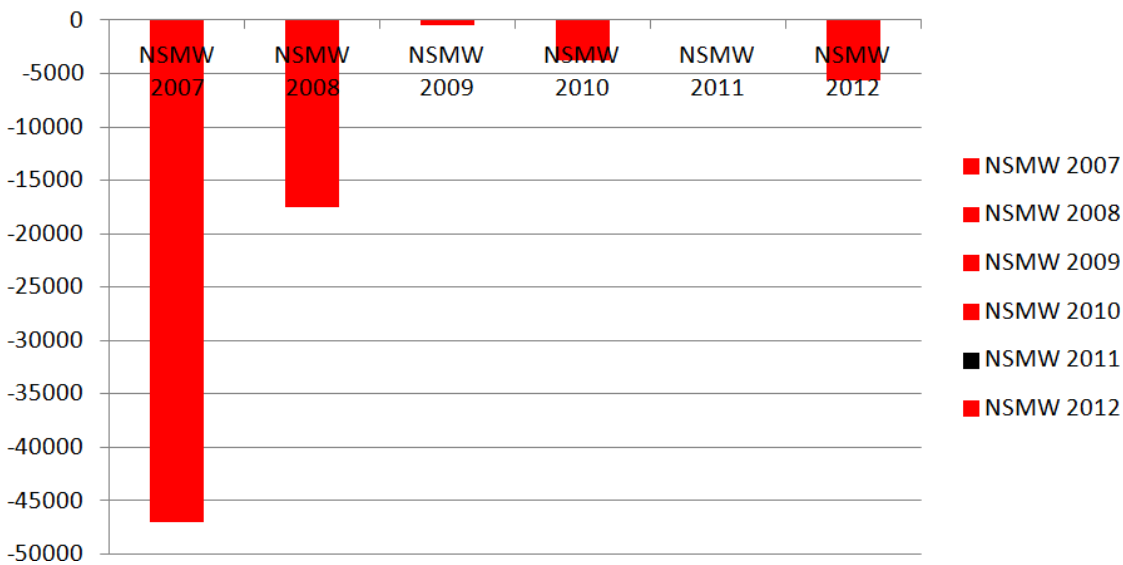


Nova Scotia Music Week saw 502 delegates in 2007, 542 in 2008, 660 in 2009, 734 in 2010, 929 in 2011 and 990 in 2012. Volunteer registration increased by 70 over the year previous. The continual increase in registration over the last five years is reflective of our extensive international and domestic buyers program which continues to grow each year.

The 2012 edition of Nova Scotia Music Week saw the largest International Buyers Program to date and featured a “Spotlight on Germany”, an export training track for Export Development Program clients, the Canadian Organization of Campus Activities (COCA) Atlantic Region Conference and the Atlantic Presenters Association annual block booking meetings.

Financial Overview

NSMW Surplus/Shortfall 2007-2012



Nova Scotia Music Week 2012 saw a deficit of \$5,632.00. The most significant contributing factor to this deficit was unforeseen labour costs which were not budgeted. Music Nova Scotia and the local host committee were not successful in sourcing a local organization to provide labour in exchange for a donation. Music Nova Scotia hired labour from Halifax which resulted in unexpected costs for wages and travel expenses but turned out to be money well spent. Our labour crew was the most professional to date and provided for efficient and timely load ins and outs. Moving forward this expense will be budgeted and planned for in advance.

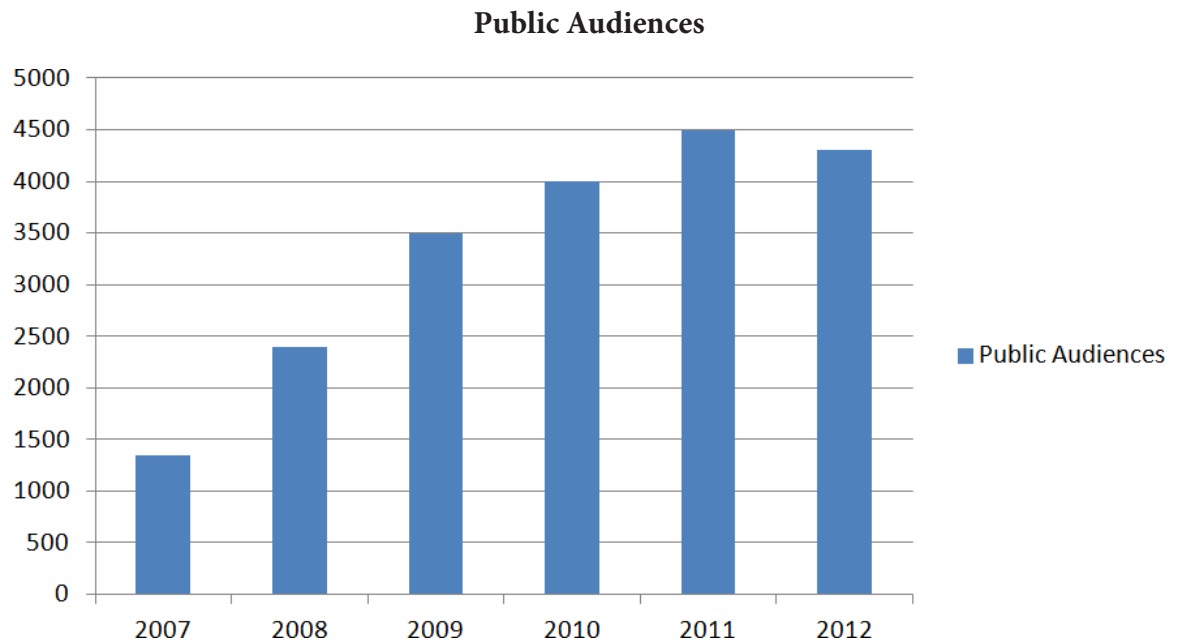
Revenues remained stable compared to prior year's financial performance which is impressive considering the population of the Region of Queens Municipality is 50% less than that of Yarmouth County and the recent economic challenges faced in the host community in 2012.

Notable 2012 revenue activity:

- Funding increase over year prior due to expansion of International Buyers Program and Export Training Track
- Sponsorship increase over year prior (\$384.00 but an increase nonetheless)
- Slight decrease in ticket sales (\$1,676.00) over year prior
- Slight increase in Gala ticket sales (\$662.00) over year prior



Public Attendance 2007-2012



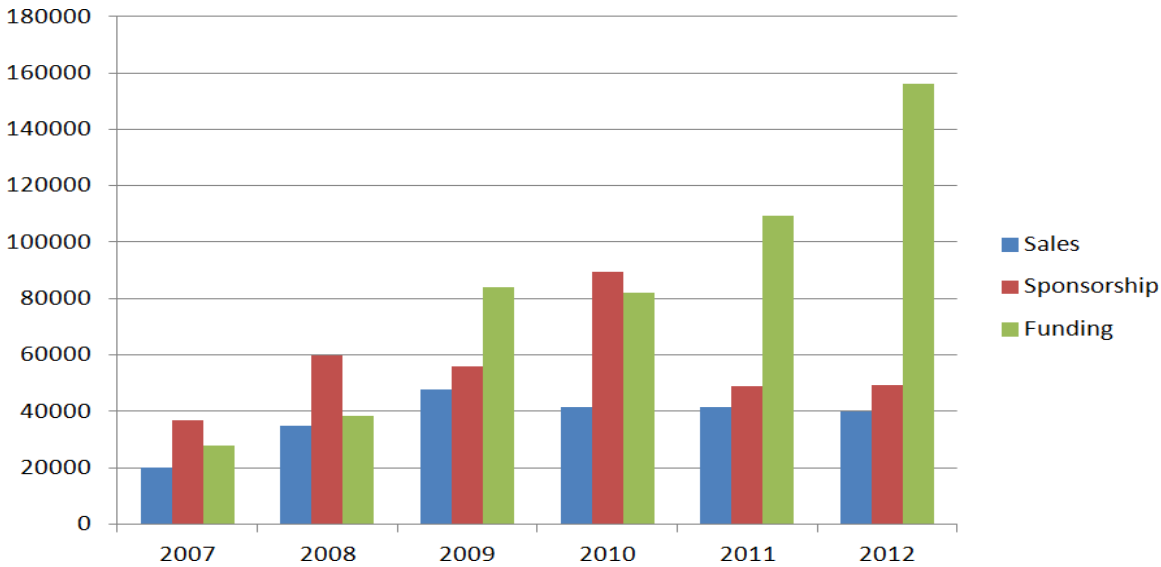
Nova Scotia Music Week 2012 saw a 5% decrease in public audience participation over the year prior. Again, considering the population is 50% less than the 2011 host community this decrease is not a major cause for concern and may in fact indicate an increase in out-of-town visitors to the event. However, the future success of Nova Scotia Music Week is dependent on increasing public participation and ticket sales.

One of our biggest challenges is lack of resources for marketing. Music Nova Scotia must work toward increasing the marketing budget in terms of cash and in-kind partnerships to gain more reach and market share. Branding and messaging must be focused on promoting the event as a public music festival rather than an industry orientated event.

- Public audience participation must increase
- Ticket sales made up only 15% of total event revenue in 2012
- Nova Scotia Music Week has a shoestring marketing budget which must increase (cash and in-kind)
- Economic challenges in host communities demands aggressive ticket pricing, bundling and promotional offers
- Nova Scotia Music Week 2012 reached 75% of total event capacity down from 80% year prior



Sales, Sponsorship, and Funding 2007-2012



Public funding for Nova Scotia Music Week 2012 accounts for 59% of total event revenues. The remaining 41% of revenues is corporate sponsorship (20%), ticket sales (15%), BIH (3%) and artist submission fees (3%). This is a very healthy public versus private investment ratio. This illustrates Music Nova Scotia's commitment and ability to attract private investment in the music sector.

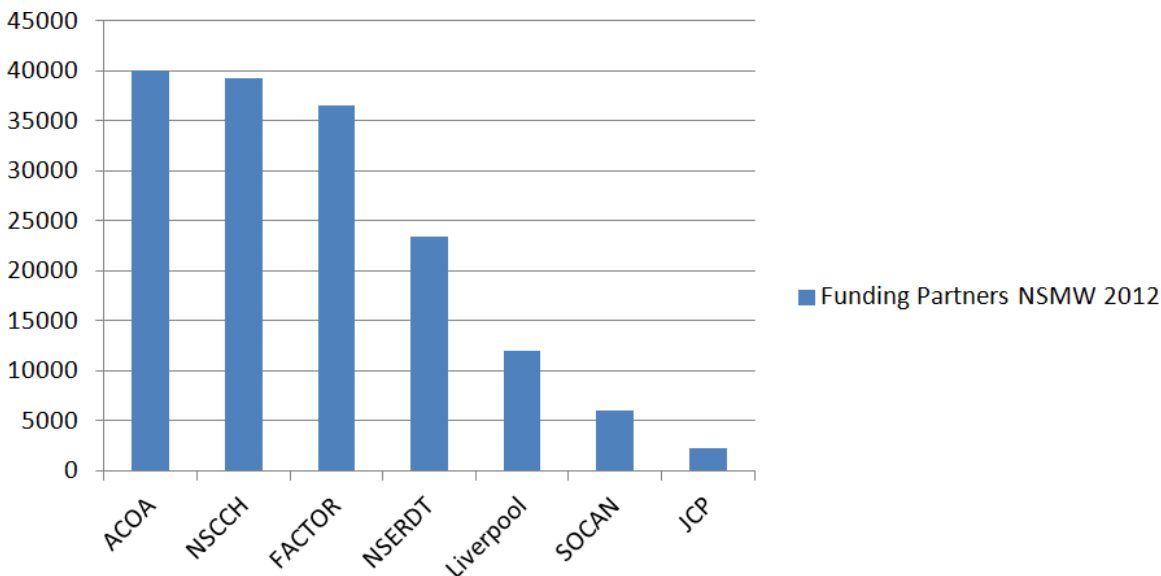
It is also important to point out that in-kind/trade partnerships for NSMW 2012 were valued at \$131,000.00.

NSMW Funding Percentage by Level of Government

- Federal – 50%
- Provincial – 39%
- Municipal – 8%
- Private Foundation Funding – 3%

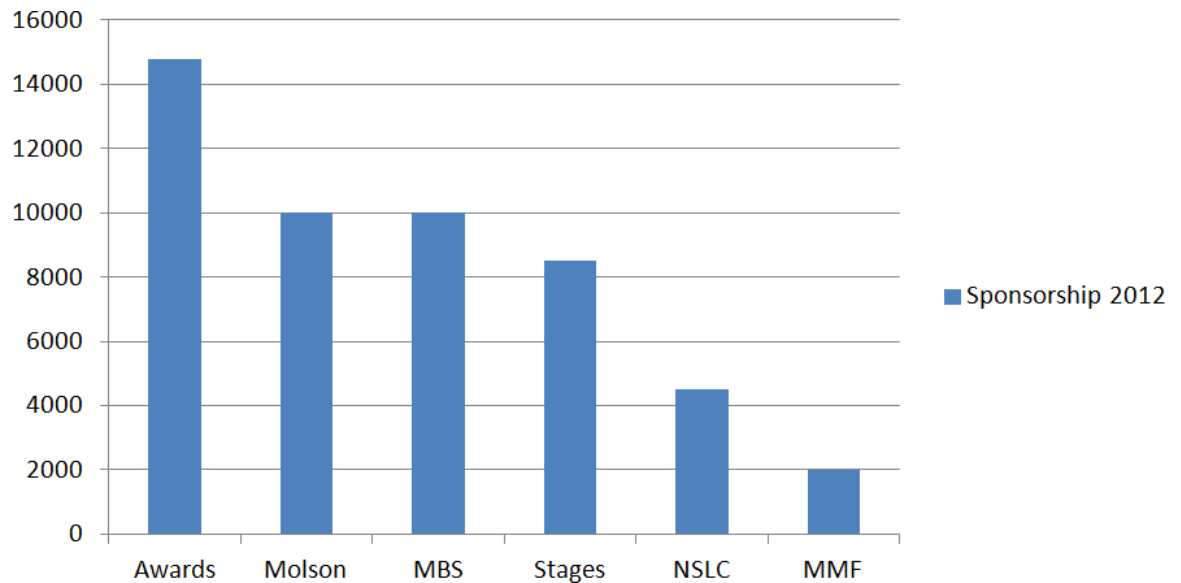
Funding Nova Scotia Music Week 2012

Funding Partners



Private Investment Nova Scotia Music Week 2012

Sponsorship NSMW 2012



Award and stage sponsorships combined contributed \$23,300.00 to sponsorship revenue in 2012. These sponsorships are sourced primarily in the host community and from our membership. NSMW 2012 saw a 13% decrease in local sponsorship compared to the year prior. This can be attributed to the local host committee and their extremely late start in soliciting potential partners in the community. The host committee team was provided with the resources and materials in January 2012 so that they were given adequate lead time to execute the procurement process. The procurement process was not activated until August/September due to host committee team member's responsibilities with other events in the community and a general lacking in any sense of urgency around the sponsorship procurement process. In fact, Music Nova Scotia was forced to engage additional community partners outside of the host committee to ensure local sponsorship procurement became a priority. The newly formed Events Liverpool community group along with key personnel at White Point Beach Resort stepped in to save the local sponsorship procurement process.

International Buyers Program 2012 – A Spotlight on Germany

The 2012 edition of the Music Nova Scotia International Buyers Program at NSMW was the largest edition of the program to date.

- 20 German Buyers
- 10 UK Buyers
- 13 North American buyers
- Over 60 regional buyers (APA, BIH, COCA)

Member Survey Highlights to Date (84% response rate to date):

- \$131,500.00 in direct immediate sales (a NSMW first for immediate/direct bookings to out performing potential sales)
- \$106,000.00 in direct sales in 6-12 months
- \$125,000.00 in BIH artist fees (2012/2013 season)
- Paper Beat Scissors licensing and distribution deal (Ferryhouse)
- A.A. Wallace, Cousins and Mo Kenney secure bookings for The Great Escape
- Steven MacDougall acquired a German agent
- 63% of respondents have done business as a direct result of NSMW to date
- 100% of respondents believe they will do business in the future as a direct result of NSMW

- 50% of buyers surveyed to date have already begun working with Music Nova Scotia members as a direct result of NSMW

Guest Delegate Impressions of NSMW 2012

“It was great to meet most of the artists in person! It’s nice to know the people behind the projects. The unexpected benefit was for example, to deepen the business relation to German promoters. And it’s great to have people for promotion, booking and label watching an artist together and find a possible strategy to work with the artist.”

Michael Borwitzky – A&R, Ferryhouse Music

“Just wanted to drop you an email to say thanks for a brilliant weekend in Nova Scotia. I’m currently sitting back at my desk in rainy London where the skies are grey and the only water I get to see is the murky River Thames – oh to be back in Liverpool! Thanks for looking after us all on the trip, such excellent hospitality and one of the friendliest communities of staff and volunteers I’ve come across at a festival. Congratulations on the success. I saw some great artists: Mo Kenney, Cousins, Kuato and AA Wallace were particular highlights, plus great performances from Acres & Acres and Mountains & the Trees, all of whom I’ll be pitching for TGE.”

Kevin Moore – International Manager, The Great Escape

“All of us had a blast! THANK YOU VERY MUCH. It really was pleasure to be in Nova Scotia. Everybody was cool and super friendly and the whole organization was brilliant. The close connection to your fantastic artists made this event way more effective and special than other show case festivals. We’re actually talking about doing something with a few of them.

It was perfect to meet all the artists directly (in the speed meetings, the 5min-pitch, in the bowling alley etc.) This is a big difference in comparison to other showcase festivals and very helpful for both sides, which leads definitely to better results. I go to a lot of show case/conference festivals every year and I really enjoyed NSMW a lot. The organization and the whole team were awesome, NS is truly beautiful, everyone was super friendly and we saw loads of talented artists, which I never heard of before...”

Stephan Thanscheidt – FKP Scorpio, Head of Festival Booking

“Ed and I were extremely impressed by the amount of professionalism, exceptional music quality and kindness that everyone associated with Music Nova Scotia showed us in Liverpool. The hospitality that you all showed us is second to none. We’ll be talking about the trip for years to come. Thank you for everything and know that you’ll always have friends in Milwaukee!”

Patrick Boyle – Milwaukee Irish Festival, Executive Director

“Everything was so well organized and I think the German delegation was truly impressed with the hospitality of the local people and your success in running the event so smoothly. It was really a delightful experience! I enjoyed hearing all of the great Nova Scotia music and hope that I can be of assistance in exporting some of this music to Germany.”

Claudia Seeber – Embassy of Canada, Berlin, Trade Commissioner

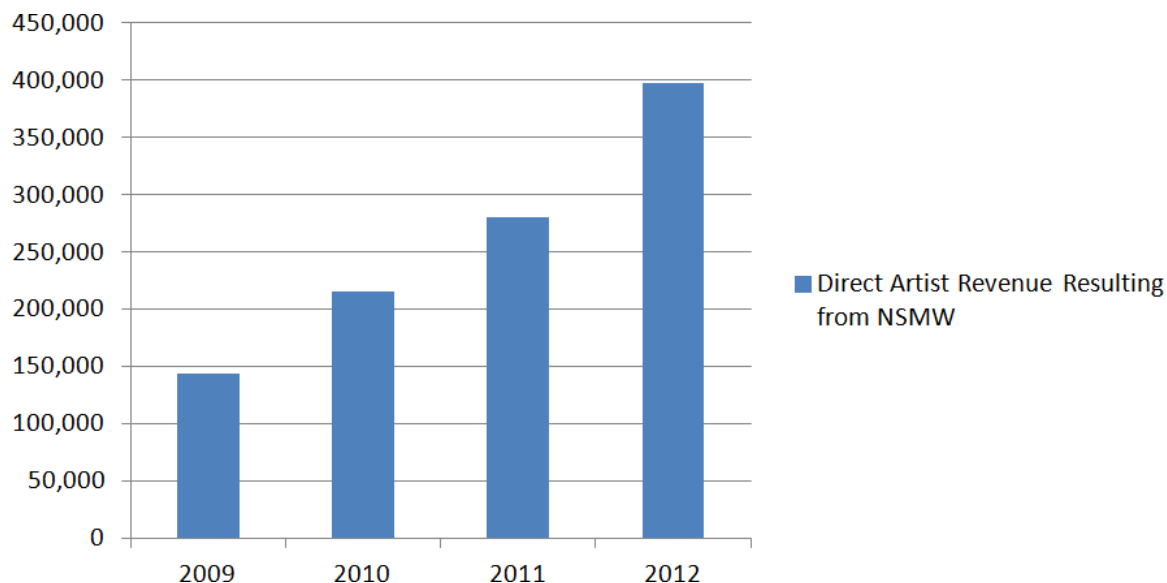
The Return on Investment

Estimated Sales

The following sales figures are a combination of those reported by participating buyers and artists and estimates made by Music Nova Scotia as a result of the project. The numbers represent performance fees and licensing fees over the next 12 months.

Total Sales to Date	\$362,500.00
Artist Fees Paid at NSMW	\$34,672.00
Total Revenue to Artists	\$397,172.00

Direct Artist Revenue Resulting from NSMW



Economic Impact and the Host Community

Using figures and indicators provided by the Nova Scotia Department of Economic and Rural Development and Tourism it is estimated that \$823,560.00 was generated in revenue in the host community by attending delegates and the local public. These figures do not include the amount of money spent directly by Music Nova Scotia for local goods and services required to plan and execute the event. This figure is approximately \$80,000.00. Also, economic output multipliers are not included in this estimate.

Participants NSMW 2012	# of Participants	# of Days	Average Daily Spend	Total Average Spend
Conference Delegates and Volunteers	1165	4	\$66.00	\$307,560
Local Participants	4300	4	\$30.00	\$516,000
Total				\$823,560

Major Challenges

1. **Geographic Location** – an overwhelming number of survey respondents expressed the inconvenience of the geographic location in regard to distances between event venues. This was not only challenging for delegates but also for staff in their logistics planning. Distance between venues had many ripple effects including transport frequency, safety, and getting buyers to shows. It is interesting to note, however, that given these challenges over 75% of survey respondents rated shuttle service favorably.

Shuttle Service Survey Results

Fast & Friendly: 76%
Fine & Formal: 12%
Failing: 12%
Flunked: 0%

2. **Sound Production Quality** – survey respondents also expressed an overwhelming concern in regard to sound production quality. Although there were issues at various venues regardless of production supplier most issues were directed toward stages supplied by Tour Tech East. Inexperienced staff was provided by the supplier. In particular, most respondents identified Lane's as the problematic venue. Most venues were also over specified in terms of PA. It is important to note that the quality of available venue inventory was problematic in itself presenting unforeseen challenges to even experienced technicians. This was evident at White Point's Atlantic Room.

Music Nova Scotia has changed its sound production policy moving forward:

- Music Nova Scotia will be responsible for hiring FOH staff
- Mandatory sound checks for all performing artists
- More careful review of technical specs to ensure appropriate PA coverage for venues

3. **Labour** – finding volunteer labour and labour compensated through honorarium to local organizations in the host community proved to be impossible. In the past when this was possible the labour supply was inexperienced causing its own set of challenges. Music Nova Scotia was forced to hire more experienced labour and although it was an unforeseen expense that contributed to a financial shortfall for the event it was money well spent. We experienced our best year to date in terms of production load ins and outs.

Host communities can no longer be responsible for providing volunteer labour or labour that is compensated through honorariums to local organizations. Skilled experienced labour must be contracted moving forward. Also, this will be the responsibility of the technical director.



EXPORT DEVELOPMENT PROGRAM FOR MUSIC



Export Development Program for Music Report

A New Outlook on Export

In this past year, Music Nova Scotia began to truly focus and structure our exporting knowledge. We hired [Nordicity](#) and [Sound Diplomacy](#) as consultants to create the **Exporting Strategy**, to guide us for the next three years. In May, 2013 it was released to the public.

Internally at Music Nova Scotia, it gives us, our members and our funding clients more effective direction in exporting music to the rest of the world. It focuses our targets on worthwhile markets, offers guidance on proven techniques and improves our ability to prepare and showcase artists from Nova Scotia.

Externally, we are making a firm statement that we are the business-minded, exporting office for music from Nova Scotia. As the strategy states, the main objectives are to:

“(i) Increase the amount of new exporters, and (ii) Diversify the level of existing exporters. Success in doing so would lead to greater and more diversified revenues, which would increase the health and sustainability of Nova Scotia’s music industry.”

Music Nova Scotia looks forward to continuing the upward and outward motion of our exporting success in Nova Scotia’s music industry with Film and Creative Industries Nova Scotia as a new partner.

Objectives

The objective of the Export Development Program for Music is to expand market opportunities and earned revenue potential, and to increase sales of music products through the support of travel, tour, marketing and promotional expenses. Now three programs exist to facilitate these objectives - *the Travel and Tour Initiative, Marketing Support Initiative and Showcase Support Initiative*.

Questions the jury considers before scoring the applications include: “*Does this project or proposal make sense? Are the goals realistic? Is the plan of action reasonable and likely based upon what the artist or group hopes to achieve? Is the budget realistic?*”

The EDP is a result of collaboration between the Culture Division of the Nova Scotia Department of Communities, Culture and Heritage, and Music Nova Scotia. Born out of the Music Sector Strategy (MSS) - written in 2002 and updated in 2007 - the EDP is the first of the initiatives defined in the MSS by the province’s musicians and industry professionals as requiring investment. The Program aims to further build and develop the infrastructure necessary to promote music from Nova Scotia.

Music Nova Scotia administers the program, assuming responsibility for day-to-day program management, consultations with applicants, budgeting, assembling juries, financial reporting, and reporting on program outcomes.

The Current Picture of the Export Development Program

SUCCESS

EDP clients have reached incredible heights in the past year. The EDP’s top-funded artist, **Old Man Luedecke**, has found longevity in his latest release, *Tender Is the Night*. In 2012, Luedecke used the EDP to tour the UK and attend the International Bluegrass Music Association festival in Memphis. With the critical acclaim of his album, Luedecke has been recently funded to go back and tour the UK and US more extensively. The positive reviews continue to pour in, like a recent one from the [Telegraph UK](#).

Luedecke was funded \$26,500 in the past year. The next most-funded artist is **Rich Aucoin** (\$23,644.90). Their manager, Jason Burns, says the EDP's investment goes a long way:

"In the past six years the Export Development Program has contributed funds to our company, Burnt Tree Entertainment, and our clients (Rich Aucoin & Old Man Luedecke). The funds have been used to enable us to showcase on international stages including CMJ, SXSW, TIFE, and many more. The program has also funded business meetings for negotiations and tours which are used to build an artist's career in valuable markets. Touring revenues from future bookings negotiated will definitely exceed \$50,000 in the next 10 years, all directly related to the SXSW and Folk Alliance trips this past year."



Rich Aucoin on a Canadian tour in support of K-OS, before touring France, 2013

Newcomer **Paper Beat Scissors** (aka Tim Crabtree) has been successful with all three of his EDP applications and has taken his critically acclaimed music all over Europe and the UK. At Nova Scotia Music Week, he impressed the German delegation so much that he recently signed with Ferryhouse in Hamburg and is working with various European booking agents. Crabtree offers this:

"Music Nova Scotia's Export Development Program has been fundamental in my career development as a touring and recording musician. In the last two years, with the assistance of touring grants, I have been able to showcase Paper Beat Scissors in 8 European countries, playing to thousands of people in the flesh, and exponentially more through media coverage received for these tours in the target markets, spreading the word about Nova Scotia as I go. I have also connected with agents, labels, festival organizers and dozens of other industry professionals through EDP events. I am presently in the final negotiating stages of a record contract to release my music in Germany, Austria and Switzerland (a market of close to 100 million people) through a label brought to Nova Scotia for Nova Scotia Music Week. I am also working with two European booking agents who have already booked shows at festivals in Europe for the month of May. The EDP has taken my career and put it into overdrive."

As the Export Development Program goals state, we support finding "new and non-established markets". It seems unlikely that a metal band from Nova Scotia could break through in Mexico, but **Napalm Raid** did just that. Lead man Graham Ferguson found a trustworthy promoter and wrote a solid business plan for tackling the foreign territory. In his final report, he states:

"Positive feedback from this tour has opened up touring possibilities in other Spanish-speaking areas such as Brazil and Spain. Dogma Destroyer will also be helping us book our European Tour, planned for fall 2013. EMF Records (based out of Queretero) will also be releasing a Discography CD which will be distributed in Mexico and Europe, as a result of seeing us play."



Napalm Raid documented their epic Mexican tour online through Tumblr and Facebook

Meanwhile, **Ben Caplan** has continued to tour the world on his first full release, finding receptive audiences in more and more new markets. This year, he completed his third tour around Europe, securing more dates and more venues each time. He's also recently added Australia to his tour map.



After a sold-out show in Kraków, Ben Caplan praised Europe on Twitter.

Sheri Jones is one of the program's most active applicants, applying for Joel Plaskett, David Myles, Mary Jane Lamond, Mo Kenney, Molly Thomason and Dylan Guthro.

*"The EDP has been invaluable to the development and growth of all of our Jones & Co. artists. From international showcasing of established artists like Joel Plaskett and David Myles to national and international showcasing of emerging artists like Mo Kenney and Molly Thomason, **the EDP has allowed us to take advantage of opportunities that will expand and establish our artists' careers.**"*

Gloryhound has been funded three times in the last year for touring and showcasing (after getting a boost with EDP marketing help last year). Their manager, Gordon Lapp, has also sourced funds from the EDP to travel to conferences and broker deals for the band. He credits the EDP with the band's success.

"In three years Gloryhound has developed from a local band playing small local venues to a band that has had top 15 charting songs, signed a multi record deal with a large label, has played arenas across Canada, has licensed many songs to feature movies and TV shows and a band that is about to record an album with one of the biggest record producers in North America."

This success would not have been possible in this short period of time without the support to attended conferences and showcases that has exposed the band to the industry professionals that would eventually act as buyers, labels, agents, producers, and promoters for the band.

The EDP is an excellent example of public support that is truly a partnership between public funds and a cultural industry. Members of Gloryhound have invested a significant amount of their own money into this development however the additional funds made available from the program have allowed the band to capitalize on opportunities that would not have been possible without the additional support made available by the program.

*Music Nova Scotia has not only done an excellent job of administering the program and the funds their thorough jury system has ensured that the money is invested only in projects with a sound business basis. **Their approach to the program has enabled the Nova Scotian music industry to become not only great musicians and ambassadors, they have become much better business administrators.** Accessing the EDP requires a sound business plan by the applicant in order to have a chance to access support.”*

In February of 2012, **Rose Cousins** released her fourth album, We Have Made A Spark. Not long before, she secured a new manager out of Maine, the experienced Michelle Conceison of Market Monkeys. With the help of the EDP, the duo set out to conquer the Canadian, US and UK markets with this album and finally ‘break’ this incredibly talented artist into an international star. Since the release, she has found success from audiences, critics and industry alike.

“In 2012-13, Rose Cousins made significant advancement in her career internationally. Without the support of Music Nova Scotia, our efforts and Rose’s successful campaigns would have been impossible. As a result of MNS grants, Rose toured and promoted her music across the United States, Ireland, the United Kingdom, and Canada. She was recognized by major media outlets in the US including NPR, USA Today and Oprah Magazine. She attained licensing placements in popular shows including Greys Anatomy, delivering her music across the world. She made the RTE Playlist in Ireland, received 4 stars in The Irish Times, and performed as part of Canada Day celebrations in Trafalgar Square, London, UK. All, a direct result of efforts made with support from Music Nova Scotia’s Export Development Program.”

~ Michelle Conceison, manager for Rose Cousins

Cousins and her manager have managed to capitalize on the wave of attention Rose’s latest album has received in a way that works in perfect harmony with the Export Development Program. They consistently do what’s necessary to get funded: show a great business plan; demonstrate results; move onto new markets that make sense; use efficient budgets; and leverage other funding sources (FACTOR). As one jury member stated, “She has a real shot.” These kinds of artists truly benefit from the program – those who are at the breaking point of becoming internationally known.



Rose playing at the Juno 2013 Gala

STRAIN

Statistically, the program has had a decline in the percentage of applications it has been able to fund. As well, more applications are given partial funding, rather than their full request. This is largely not because of low scores, but because there are so many good applications and the juries are prone to ‘spreading it around’, rather than completely deny good applications.

- 56% of eligible projects were funded (in whole or in part)
- EDP investment into funded projects represented 16% of the total project spending, triggering more than \$1.6 million in private investment.
- 66% of funded projects are artists hitting the road outside of the province (61% of those are outside of the country)
- 7% of funded projects were given what they had requested. 93% were given partial funding. This is notable because 21% of final reports state that a lack of funds was a challenge in completing the project as proposed.

Recently, a juror said that a project plan submitted to the EDP jury was “better than most Fortune 500 company business plans” that he reads on a regular basis. The quality of applications, especially those applicants who have had consultations, has increased year over year. The majority of the applications are good and score well, however there just isn’t enough funding to go around. The jury is directed by the Program Officer to keep the program directive in mind: expand market opportunities, increase earned revenue potential and help increase the sale of music products through the support for travel and related marketing expenses. The projects that best demonstrate this are the ones that are able to push through.

The Showcase Support program has been incredibly useful in helping prioritize spending. It funds official showcase opportunities that are not just about playing music, but also generating business. Most showcase applications come with a guest confirmation list, details of other meetings and activities or other dates to finance the showcase appearance, to demonstrate a return on investment. With only \$9735 earmarked for showcase funding per level, per round, it’s highly competitive and would benefit immensely from a boost in funding.

The Export Development Program for Music began its ninth fiscal year in April 2012. The four deadlines being reported in the following tables and charts include June, September, and December of 2012 and March 2013. **\$313,991.30** was invested into 94 projects by 46 artists/groups and 6 industry professionals.

Table 1 - By Program, Applications Submitted vs. Approved, and Approval Rating

	2012-2013			2011-2012		
Program	Applications Submitted	Applications Approved	Approval %	Applications Submitted	Applications Approved	Approval %
Travel and Tour	75	44	59%	96	67	70%
Marketing Support	49	22	45%	46	30	65%
Showcase Support	45	28	62%	38	25	66%
Total	169	94	56%	180	122	68%
	2010-2011			2009-2010		
Program	Applications Submitted	Applications Approved	Approval %	Applications Submitted	Applications Approved	Approval %
Program	124	84	68%	112	78	70%
Marketing Support	45	27	60%	41	20	49%
Total	169	111	66%	153	98	64%

Fifty-six per cent is the lowest approval rate the program has had since 2007-08. In past final reports, it has been mentioned that there is a “tier-two” set of applications that the jury would partially fund, but don’t have enough funds left over. Now, we are seeing 15% of submitted applications that score above 80% (one as high as 90.3%) that aren’t being funded at all. This speaks to the incredibly high level of competition the Export Development Program has reached. In the last jury for the March 2013 deadline, jury members sat for more than an hour and a half, head in hands, trying to deliberate how to carve up \$37,500 for 33 applications. Some very experienced applicants were denied funding this round, as a result of incredibly hard decisions that had to be made.

The EDP juries are becoming more conscious of not funding a partial amount that will “cut a project off at the knees”. That is, the amount awarded will not be below the true “hard costs” amounts for transportation, accommodation or registration fees. However, that forces the funded applicant to complete the project with reduced funds to pay their service providers, performance fees for themselves and hired musicians – even the costs for food in per diem amounts. With the rising costs of everything else artists have to pay, the stagnant level of funding for the EDP has created a negative message to funded applicants: Your project is excellent and was approved, but you have to do it for much less than you planned. With budgets already being submitted as lean as possible in order to compete, this is a tough pill to swallow.

Chart 1 - 2012/2013 Submitted vs. Approved:

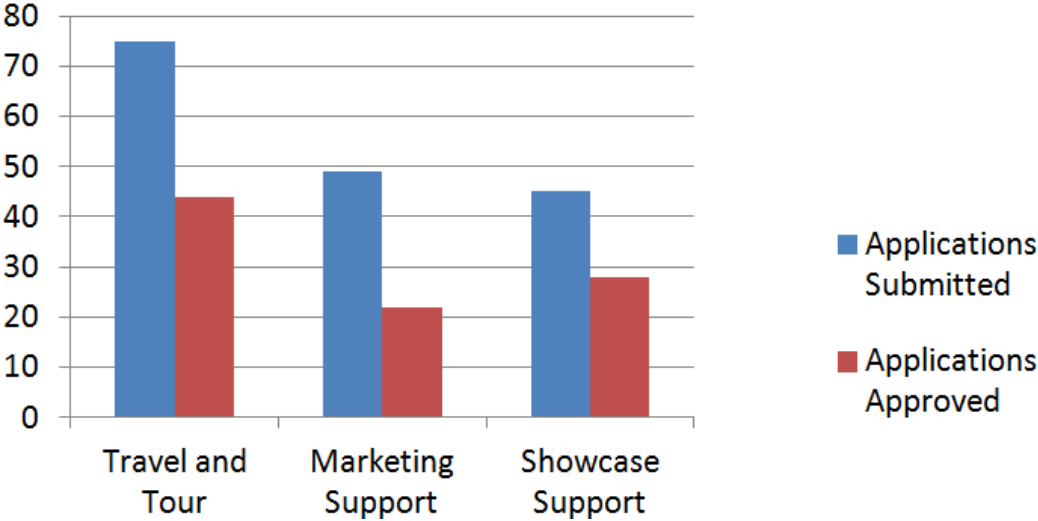


Table 2 - By Export Status, Applications Submitted vs. Approved

2012-2013						
Export Status	Applications Submitted	Applications Approved	Approval Rating	Projected Expenses for Approved Apps	EDP Funding	% of Projected Expenses
Export Ready	114	53	46%	\$580,212.70	\$149,978.27	26%
Exporting	55	41	75%	\$548,212.70	\$164,013.03	30%
Total	169	94	56%	\$1,128,425.40	\$313,991.30	28%

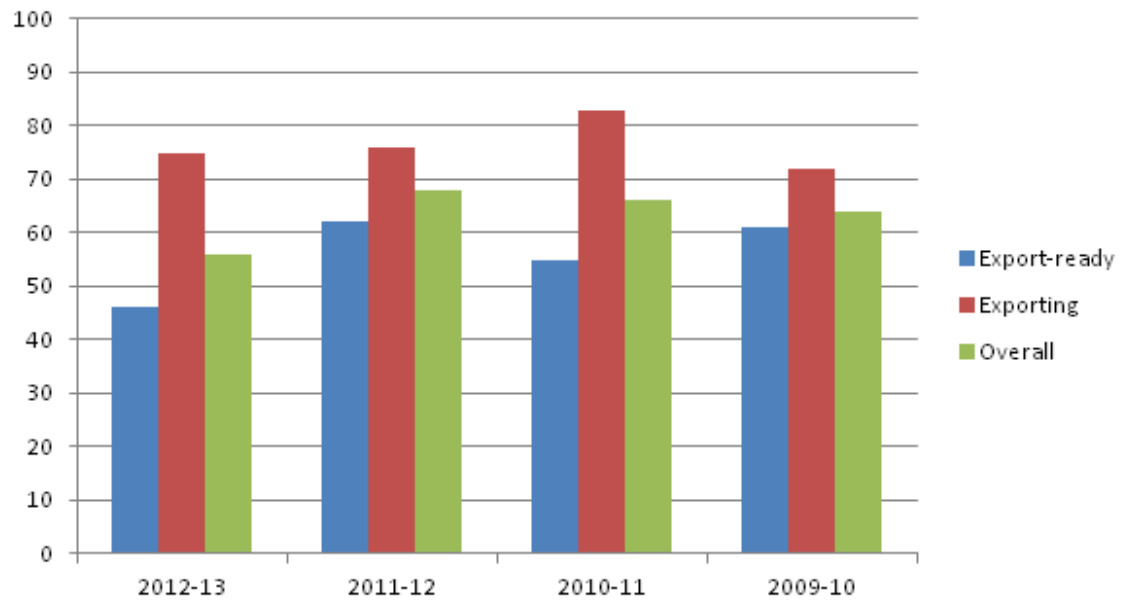
*17 of Export-Ready are Emerging applicants for Showcase

2011-2012						
Export Status	Applications Submitted	Applications Approved	Approval Rating	Expenses for Approved Apps	EDP Funding	% of Projected Expenses
Export Ready	102	63	62%	\$619,002.60	\$172,791.86	28%
Exporting	78	59	76%	\$660,346.91	\$168,302.83	25%
Total	180	122	68%	\$1,279,349.51	\$341,094.69	27%

2010-2011						
Export Status	Applications Submitted	Applications Approved	Approval Rating	Total Expenses	EDP Funding	% of Projected Expenses
Export Ready	104	57	55%	\$615,995.62	\$176,569.15	29%
Exporting	65	54	83%	\$814,866.14	\$166,640.40	20%
Total	169	111	66%	\$1,430,861.76	\$343,209.55	24%

2009-2010						
Export Status	Applications Submitted	Applications Approved	Approval Rating	Total Expenses	EDP Funding	% of Projected Expenses
Export Ready	100	60	61%	\$787,808.21	\$166,814.24	21%
Exporting	53	38	72%	\$566,567.28	\$143,542.58	25%
Total	153	98	64%	\$1,354,375.49	\$310,356.82	23%

Chart 2 - Export level approval rating by year



There still are more Export Ready applicants than Exporting, simply because of the more stringent qualifications to become “Exporting”. However, there may be an increase to Export Ready because the Showcase Support Initiative allows for Emerging Artists to apply to the program if they have an exporting showcase opportunity. They don’t receive any special consideration by the jury, other than their professional history is gauged by what they’ve done in relation to the time they’ve been in existence. They are eligible based on being officially accepted to play in a recognized showcase spot.

Table 3 - By Region, Applications Submitted vs. Approved

Region	2012-2013			2011-2012		
	Applications Submitted	Applications Approved	Approval Rating	Applications Submitted	Applications Approved	Approval Rating
HRM	132	76	58%	136	97	71%
Cape Breton	14	8	57%	17	12	71%
Northumberland Shore	13	5	38%	13	7	54%
Fundy Shore	1	0	0%	2	1	50%
Annapolis Valley	1	0	0%	3	0	0%
South Shore	8	5	62%	7	4	57%
Eastern Shore	0	0	0%	2	1	50%
Total	169	94	56%	180	122	68%

	2010-2011			2009-2010		
Region	Applications Submitted	Applications Approved	Approval Rating	Applications Submitted	Applications Approved	Approval Rating
HRM	128	84	66%	132	89	67%
Cape Breton	23	16	70%	8	2	25%
Northumberland Shore	9	8	89%	3	3	100%
Fundy Shore	0	0	0%	2	2	100%
Annapolis Valley	1	0	0%	4	0	0%
South Shore	7	3	43%	4	2	50%
Eastern Shore	1	0	0%	0	0	0%
Total	169	111	66%	153	98	64%

The number of approvals for HRM continues to dominate over the other regions of Nova Scotia for obvious reasons: population, proximity to venues and resources and the size of the music community itself. There is always a desire to draw in more artists from the outer regions of HRM. We currently have a Music Nova Scotia staff person researching and reaching out to artists who are not currently engaged with our organization or the Export Development Program, who could be considered candidates for funding. Our priority is to find those who are from regions outside of HRM and under-represented genres.

Further, Nova Scotia Music Week will be held in Sydney, Cape Breton in 2013. Music Nova Scotia is working toward exposing musicians in that region to our organization and considering them in for export training, if they are eligible.

Chart 3 – Funding By Region

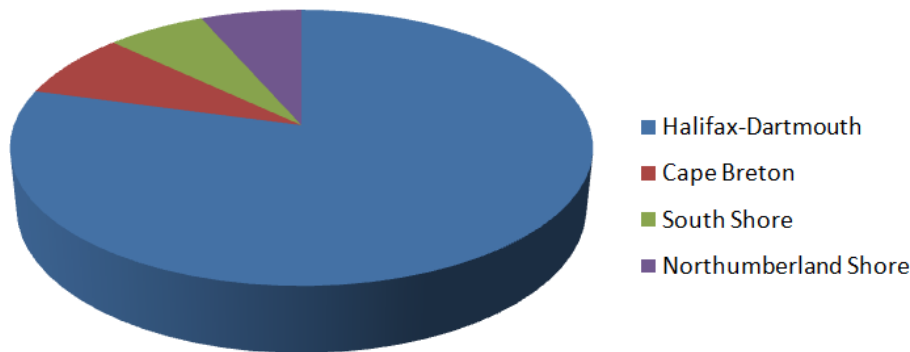


Table 4 – Market Visits by EDP Funding Recipients

Market	12/13 Visits	11/12 Visits	10/11 Visits	09/10 Visits
Canada	72	60	67	69
United States	46	25	25	31
UK and Ireland	28	11	19	13
Europe	28	6	5	11
Asia	0	1	2	0
Australia	7	6	3	5
Other	4	1	0	0
Total	185	110	121	129

*Taken from Showcase, Travel and Tour applications targeting these markets

This table shows the targets are growing for several foreign markets, Europe seeing the largest jump. Access to showcase funding has expanded the opportunities for artists who are invited to foreign festivals.

Nova Scotia Music Week 2012 was a key factor in the increase of visits to Europe by our exporting artists. The focus was on Germany this past year, with 20 German delegates (as well as 10 UK delegates), including booking agents, publishers, festival directors and label managers. The Export Development Program Officer worked closely with the NS Music Week conference coordinators to try and create an Export Training program that would not only educate artists about their options in foreign markets, but also foster long-term relationships between the international delegates and showcasing artists. The results were immediate and easily tracked. Ben Caplan, Cousins, Paper Beat Scissors and Mo Kenney were among the many artists who took part in the Export Training sessions at NS Music Week. In the post-event surveys, several international delegates mentioned them as new contacts. Those artists were booked for festivals and/or tours in the UK and Europe within the next year. As well, all of these artists were able to find support from the EDP for these showcasing and touring opportunities.

Table 5 - Actual Market Visits by EDP Funding Recipients

Project Locations	2012-13	Markets Accessed/ Visited	2012-13	Festivals/Conferences	2012-13
Ontario	38	Ontario	57	Other***	17
Maritime/Atlantic Provinces	18	Maritime/Atlantic Provinces	47	Canadian Music Week	13
United Kingdom	17	Quebec	37	SXSW	4
Quebec	14	Alberta	37	North American Folk Alliance Conference	3
Alberta	12	British Columbia	36	The Great Escape	3
British Columbia	12	US - Northeast	34	Contact East	2
Praries	11	Praries	32	Ontario Contact	2
Europe - other locations	11	US - other locations	29	Folk Alliance Canada	2
US - Other locations	10	US - New York	28	Ontario Council of Folk Festivals	2
US - Southwest	8	United Kingdom	25	Pop Montreal	2
US - New York	7	Europe - other locations	21	Canadian Country Music Week	1
Australia	6	Internet - global	20	CAPACOA	1
Other	6	Germany	18	Pacific Contact	1
Germany	5	US - Southwest	17	Junos	1
France	5	Australia	14	Reeperbahn	1

Methodology for 12/13: projects which actually access these markets, taken from final reports.

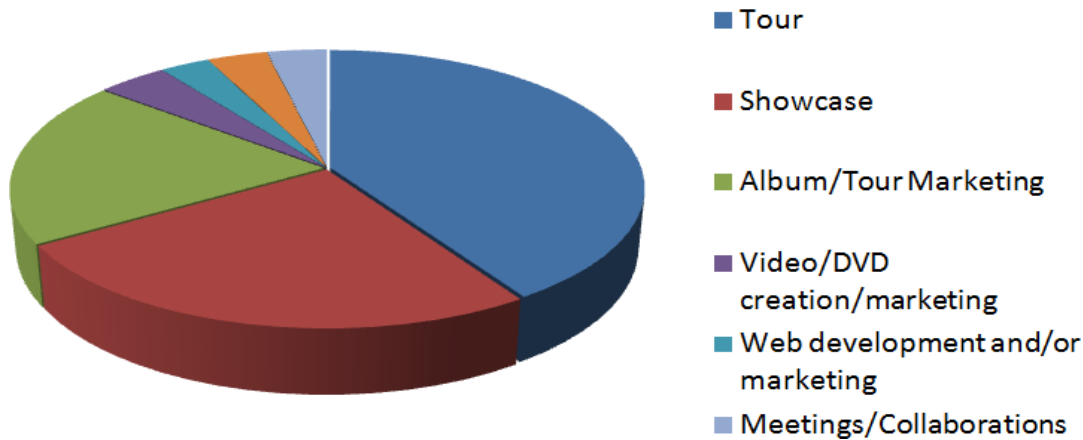
***Other showcases include: Wintergrass (US), Realscreen Summit (US), IBMA (US), Sunset Sessions (US), Tradfest (IRE), ACMIA (UK), Iceland Airwaves, WOMEX (Greece), Song Summit (AUS), Ontario Contact, Showcase Alberta, Winnipeg Folk Festival, Junos, Pacific Contact (CAN),

Table 6 – EDP Funding by Project Type 2012-13

2012-2013		
Project Type - primarily	#	EDP funding
Tour	39	\$178,475.35
Showcase	27	\$52,721.20
Album/Tour Marketing	14	\$55,170.00
Video/DVD creation/marketing	3	\$6,400.00
Web development and/or marketing	2	\$5,400.00
Conferences	6	\$6,424.75
Meetings/Collaborations	3	\$9,400.00
Market Research	0	\$0.00
Total	94	\$313,991.30

New data was collected this year to offer a better breakdown of what kind of project is being funded.

Chart 4 - 2012/2013 Funding by Project Type:



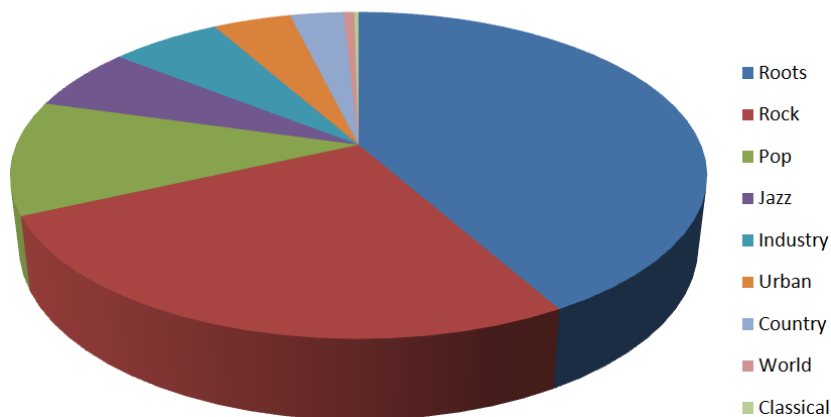
Showcase support has been in high demand this year, second only to tour applications. Album and tour marketing are the third most funded application type.

Table 7 - By Deadline, Private Investment vs. EDP Funding

2012-2013					2011-2012			
Deadline	Total Expenses	EDP Funding	Private	% Private	Total Expenses	EDP Funding	Private	% Private
Jun-12	\$259,546.45	\$82,000.00	\$177,546.45	68%	\$347,846.11	\$92,473.04	\$255,373.07	73%
Sep-12	\$278,149.16	\$81,991.30	\$196,157.86	71%	\$316,303.10	\$83,768.65	\$232,524.45	73%
Dec-12	\$276,167.12	\$75,000.00	\$201,167.12	73%	\$251,433.17	\$91,853.00	\$159,580.17	63%
Mar-13	\$315,256.20	\$75,000.00	\$240,256.20	76%	\$363,767.13	\$75,000.00	\$288,767.13	79%
Totals	\$1,129,118.93	\$313,991.30	\$815,127.63	72%	\$1,279,349.51	\$343,094.69	\$936,244.82	73%
2010-2011					2009-2010			
Deadline	Total Expenses	EDP Funding	Private	% Private	Total Expenses	EDP Funding	Private	% Private
Jun-12	\$262,320.82	\$82,449.15	\$179,871.67	69%	\$425,327.76	\$79,495.99	\$345,831.77	81%
Sep-12	\$432,095.06	\$91,227.23	\$340,867.83	79%	\$370,546.98	\$71,258.15	\$299,288.83	81%
Dec-12	\$373,665.14	\$90,060.17	\$283,604.98	76%	\$346,865.94	\$82,366.20	\$264,499.74	76%
Mar-13	\$362,780.74	\$79,473.00	\$283,307.74	78%	\$211,634.81	\$77,236.48	\$134,398.33	64%
Totals	\$1,430,861.76	\$343,209.55	\$1,087,652.22	76%	\$1,354,375.49	\$310,356.82	\$1,044,018.67	78%

These charts show the projected expenses versus the amount awarded. That gives a rough estimate of the level of private is contributed to the projects we fund.

Chart 5 - 2012/2013 Funding By Genre:



The most funded applications continue to be in Roots, Rock and Pop – arguably the biggest markets in music. Jazz has seen an increase in applications this year. These genres are derived by asking each applicant for the ‘primary’ genre of each application. However an artist often identifies with more than one genre in their profile.

Artists / Groups	Funding
Old Man Luedecke	\$26,500.00
Rich Aucoin	\$23,644.90
Ben Caplan	\$17,900.00
Rose Cousins	\$15,927.27
Gypsophilia	\$15,454.03
Dave Gunning	\$14,632.00
Mary Jane Lamond	\$13,250.00
Gloryhound	\$12,047.15
Charlie A'Court	\$11,275.00
Matt Mays	\$11,000.00
Paper Beat Scissors	\$9,213.30
Erin Costelo	\$8,180.00
David Myles	\$6,500.00
Jimmy Rankin	\$6,250.00
Cousins	\$6,200.00
Mo Kenney	\$6,023.15
Christina Martin	\$6,000.00
Classified	\$6,000.00
Wintersleep	\$6,000.00
Joel Plaskett	\$5,000.00
Quake Matthews	\$5,000.00
The Stanfields	\$4,600.00
The Tom Fun Orchestra	\$4,500.00
Jon Mullane	\$4,450.00
Jenn Grant	\$3,800.00
Ryan Cook	\$3,700.00
Ghettosocks	\$3,500.00
Stephen Fearing	\$3,500.00
POGEY	\$3,190.00
Carleton Stone	\$3,050.00
Steven MacDougall	\$3,000.00
The Modern Grass	\$3,000.00
The Town Heroes	\$3,000.00
AA Wallace	\$2,350.00
Andru Branch	\$2,000.00
Cold Warps	\$2,000.00
SoHo Ghetto	\$2,000.00
In-Flight Safety	\$1,900.00
Napalm Raid	\$1,545.00
Heather Green	\$1,500.00
Ria Mae	\$1,500.00

**Table 8 -
By Clients, EDP Funding
for 2012-2013**

Morgan MacDonald	\$1,240.00
We're Doomed	\$900.00
Scojen Music (Scott Macmillan)	\$800.00
Joe Murphy	\$600.00
Breagh Mackinnon	\$575.50
Total	\$294,197.30

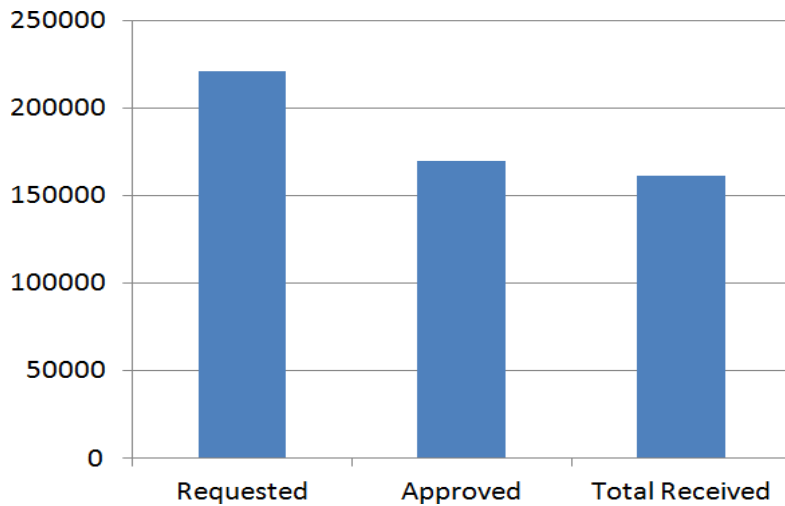
Industry Professionals	Funding
Burnt Tree Entertainment	\$8,500.00
Diminished Fifth	\$3,800.00
Jones & Co.	\$2,700.00
Village Sound	\$2,000.00
Sonic Entertainment	\$1,894.00
Rocking Horse Road Productions	\$900.00
Total	\$19,794.00

List of Program Panelists for 2012-2013

2012-2013 Panelists
Alana Yorke
Alex Meade
Alyson Sanders
Andrea Dawson Thomas
Ashley Moran
Dwayne Ellis
Glenn Graham
Ian McKinnon
Jamie Robinson
Jason MacIsaac
John Poirier
Jon Cornwall
Jonny Stevens
Josh White
Kris Pope
Matt Charlton
Ruth Minnikin
Steven Cooke
Trevor Murphy

This year, as previously demonstrated and mentioned in last year's report, the Export Development Program began collecting more detailed information and qualitative information from the applicants for not only their applications, but also their final reports. This results in more accurate reporting and allows us to show trends in the industry, but also trends and concerns with the program. Also, we are trying to better track how the money flows through the program. For example, funded applicants often do not get their full request and therefore have to modify their plans. This, in turn, reflects how much they spend and further reduces the actual amount received on projects. (See chart below.) This results in funds being reinvested into the program. However, it is worth considering how these budgets can be better fulfilled the first time around.

Chart 6 - Requested v. Approved v. Received funding amounts for 2012-13*



*Please note that statistics for this chart and the following chart were drawn from 50 selected projects which have been completed within the last fiscal year.

2012-13 Final Reports on what challenges were faced

Lack of funds - not enough to deviate from the plan.	15
Lack of funds - enough to not complete the plan.	12
Cancellation of shows/meetings/meetings	12
Transportation trouble	12
Weather	4
Band/group dynamics	3
Hopeful goals were not realistic goals	3
Lack of marketing (by you or others)	2
Broken contracts/agreements	1

Administration budget, 2012-2013

Over the course of the 2012/2013 year a total of \$313,991.30 in funding was awarded over the four deadlines. Deferred revenue has continued to be reinvested into the program for a total of \$24,382.57 in this fiscal year.

Disbursements to clients	\$300,000.00
Reinvestment	\$62,300
Salaries and overhead	\$75,000.00
Unused funds on returned approved projects	(\$24,382.57)
Total	\$412,917.43

Conclusion

The Export Development Program underwent a great deal of self-analysis this year – redesigned guidelines for easier reading and comprehension (from three documents to one), digitization of the entire program online and the tracking of information and suggestions and recommendations from jury members, clients and peers. We intend to continue maintaining integrity and relevance in the program, as well as focus on its main goal: to promote the export of our artists outside of our province.

It's a big transition year for the Export Development Program, transferring our connection from the Nova Scotia Department of Communities, Culture and Heritage Division to Film and Creative Industries Nova Scotia. We look forward to this new partnership and hope for expansion in funding opportunities and better cross-media relationships.



JENN GRANT



BRINGIN' IT HOME



DYLAN GUTHRO

History of Bringin' it Home and Summary of 2011/12 Season

Note: This year's Bringin' it Home's season ends on June 30, 2013. This is a full report of last year's season.

Bringin' it Home was initially conceived as a pre-packaged travelling tour that saw Music Nova Scotia (MNS) partner with various community presenter organizations to present music around the province. This version of the program ran for 5 years and in its final year presented 18 performances for a cost of \$100,000.00.

Debating in 2008, the new Bringin' it Home Program Community Presenters Assistance Program (BIH) was revamped to better fit the needs of Nova Scotia communities. After four seasons of the new format, it is clear that Bringin' it Home program allows dozens of presenters to develop their skills and dozens of local artists to be hired in their home province. To summarize the 11/12 season:

- 76 artists and groups performed
- 102 total performances
- 74 distinct presentations
- \$100,000 government investment stimulated **\$106,815** in artist performance fees, in addition to paying for local services by technicians, publicists, staff, etc.

The new Bringin' it Home Program

The new Bringin' it Home puts the program in the hands of the community presenter with support from Music Nova Scotia. This program creates opportunities to present Nova Scotia artists with MNS assistance and sees community presenters "own" their shows.

Under the program, participating community presenters are eligible for pre-approved funding against a financial loss on a presentation, should a loss be incurred. Shows requesting shortfall funding under BIH are branded and promoted as a "Bringin' it Home" presentation carrying the logos of MNS and the Department of Communities, Culture and Heritage.

Program Objectives

- To stimulate the development of community music presenters and Nova Scotia musicians both emerging and established;
- To foster and nurture strong artist-presenter relationships in the spirit of artistic vision;
- To increase touring activity and revenue for Nova Scotia musicians during fall, winter, and spring seasons;
- To increase the frequency of attendance by existing audiences, to attract new audiences, and to increase the range of people who attend performances by Nova Scotia musical acts;
- To create a network of Nova Scotia community presenters who participate in block booking opportunities and the promotion of a subscription series of Nova Scotia musical presentations;
- To provide Music Nova Scotia members with a data base of contact information for Community Presenters and venues to assist members in booking their own engagements;
- To provide community presenters with access to information on Music Nova Scotia members

Evaluation Process

Qualified Bringin' it Home Community Presenters will be eligible to receive shortfall funding to a maximum of \$1500.00 per performance taking place between October 1 - June 15. All requests are subject to available funding and will be pro-rated should they exceed available funding.

Eligibility

An eligible applicant is a non-profit organization committed to providing musical experiences for their community. Some undertake just one or two performances a year, others present dozens, but most will stage anywhere from three to eight performances a season. With a few exceptions, the season runs from fall to spring. Some community presenters may have paid employees on staff, but most rely on community volunteers.

Community Presenters are recognized as Bringin' it Home Community Presenters and participate in the program must:

- Commit to presenting at least one eligible performances under the program;
- Be willing to participate in artist block booking opportunities with other Bringin' it Home Community Presenters;
- Present emerging and established Nova Scotia artists;
- Set a minimum ticket price of \$15.00 for regular and \$7.00 for all-ages BIH branded presentations;
- Provide an artist fee guarantee;
- Eligible presentations must take place between Oct 1 and June 30.

Ineligible Presentations

- Performances taking place at house concerts, bars/night clubs, and restaurants;
- Performances presented by individual promoters or agents;
- Performances of non-Nova Scotian artists, or groups that are more than 50% non-Nova Scotian;
- Music Festivals and industry conferences

Application Assessment

Applications are assessed on:

- Willingness to participate in block booking opportunities;
- A balance of emerging and established Community Presenters;
- Technical capacity to present performances with in-house audio and lighting equipment

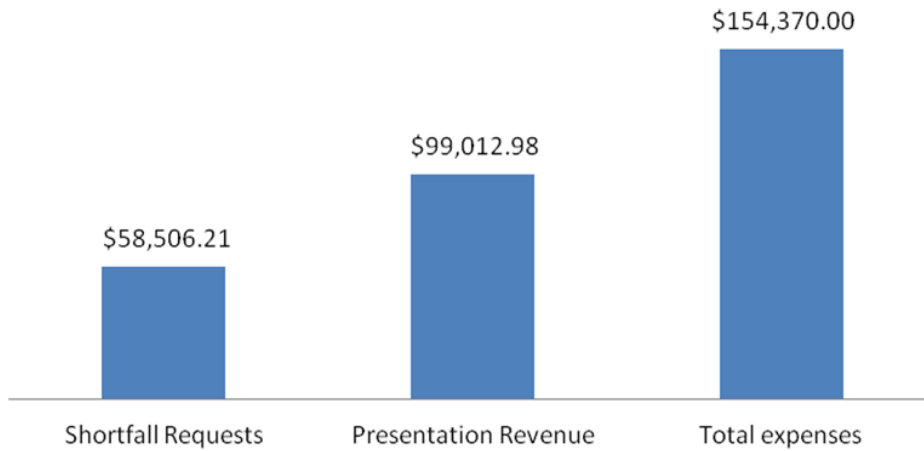
Not all Bringin' it Home branded presentations result in a shortfall during the program. The more shows presented under the program that are a financial success allow the opportunity for Music Nova Scotia to include additional Community Presenters and performances in the program. Music Nova Scotia will create a standby list and notify those Community Presenters accordingly so all are encouraged to apply.

It is required that those Community Presenters who wish to be recognized under the program contact the Bringin' it Home Community Presenters Assistance Program Officer before their application is submitted.

Shortfall requests are made available to assist Bringin' it Home Community Presenters who hire Nova Scotia based artists only. Funding is limited, so Bringin' it Home Community Presenters receiving shortfall guarantees will be those who:

- Present export ready and emerging artists;
- Present diverse musical offerings while maintaining a core audience base through balanced programs;
- Encourage and participate in block bookings with fellow Bringin' it Home Community Presenters;
- Present performances between October 1 and June 30;
- Fulfill program requirements for reporting and paperwork in a timely manner as outlined in program guidelines

2011-2012 Program Results



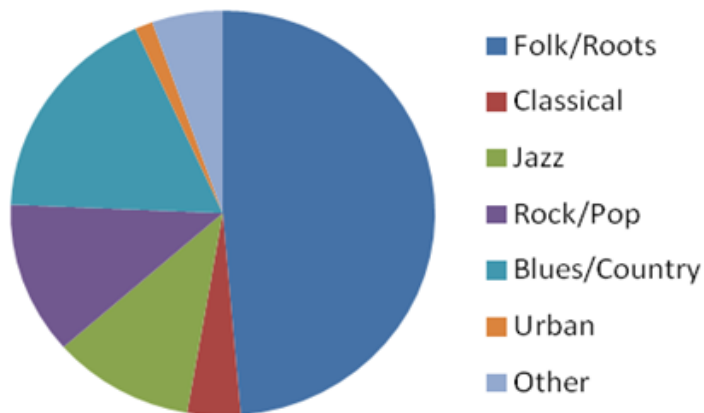
The 11/12 season chart above shows **\$58,506** in Bringin' It Home shortfall payments generated **\$99,012** in revenues for local presenters and put **\$154,370** back into the local economy and into performance fees for local artists.

There were 12 presentations this season for which no shortfall payment was required. Representing 16% of this year's total presentations, these successes are a result of strong programming choices by presenters, but also good planning and execution by presenters.

In 2008/09, the first season of the new program, **48** artists and groups performed a total of **104** times at **49** distinct shows earning **\$75,051.00**. This season, 77 artists and groups performed a total of **102** times at **74** distinct presentations, earning a total of **\$106,815.00**. Judged by any standard, these statistics indicate a vibrant and growing program.

We are pleased to see continued representation across the genre spectrum, with an increase in Blues/Country, Classical and the always popular Folk/Roots genre (which includes Celtic music). The fact that a majority of all BIH presentations fall into the Folk/Roots genre is not surprising as many of the presenters participating in the program represent soft-seat theatres and rural communities for whom these genres are most appropriate.

The chart below shows the genre breakdown of BIH presentations in the 11/12 season



Conclusion

Beyond the artists being paid to perform in their home province during the 'shoulder' seasons (which often helps fund larger exporting trips), the infrastructure that it takes to run a venue and put on these shows gives work and cultural vibrancy to small communities in Nova Scotia year-round.

The more awareness these venues can bring to the local audiences about local performers, the greater reach the artists will have with further concert ticket sales, album sales and social media attention. We've found that audiences who grab onto top-quality local artists at their local venue truly invest in those artists, following them for the long-term and championing them to their friends and family.

We hope that the Bringin' It Home brand can act as a 'quality' sticker, that will suggest to audiences that the artist, presentation and venue will be of a certain caliber that they can count on. We are working harder in the coming season to promote the BIH shows province-wide through our social media campaigns to help boost the audience attendance and increase awareness for the artists and presenters.

Music Nova Scotia has put all of the application and settlement forms for BIH online, which was received warmly by the participating presenters. This allows for easy access to statistics throughout the year and shows a detailed profile of each venue and where their strengths and weaknesses are. As a result, the Program Officer can work more closely with each venue to address common errors or difficulties and help to improve the quality and efficiency of presentations.

Administration budget for 2011-2012

Description	Revenue	Expense
NSTCH - Project Funding	100,000	
Bank Charges		9.96
Accommodations – NSMW Projects		2,644.40
Per Diem – NSMW Projects		300.00
Internal Admin Fee Expense - Proj		25,000.00
Production – Projects - NSMW		7,000.00
BIH Shortfall Expense - Proj		58,506.21
Bank fees - Projects		2.55
	100,000	93,463.12

\$6536.88 will be deferred to the 2012-13 season.

Progress update for 2012-13:

There are 29 Bringin' It Home presenters registered with the program this year, stretching across the province, including two new presenters in HRM (St. Cecilia Concert Series and Halifax Music Co-op) and one in the Northumberland Strait area (The Soirée Society). The community presenter organizations qualified for this year's program represent the entire range of presenters, from large professionally run theatres to small volunteer run community halls. BIH encourages presenters to work together in block-booking artists, giving less established presenters the opportunity to learn best-practice presenting from more seasoned presenters. This benefits both the artists and the presenters who are empowered to work together to build strong audiences and an engaged arts community.

The program has accepted 59 presentations so far this season. This season has seen representation from a variety of genres- rock, blues, folk, songwriters circles and an experimental piano concert. Music Nova Scotia is proud to say that the musical offerings provided through this program truly include something for everyone.

Qualified Presenters for the 2012-13 season:

- Astor Theatre
- Bay St. Lawrence Community Centre
- Chedabucto Place Association
- Chester Playhouse
- Evergreen Theatre
- Glasgow Square Theatre
- Halifax Music Co-op
- Harmony Bazaar
- Lunenburg Folk Harbour Society
- Mermaid Theatre of Nova Scotia
- Musique Royale
- Musquodoboit Valley Bicentennial Theatre
- Osprey Performing Arts Centre
- Petite Riviere Fire Department
- St. Cecilia Concert Series
- The Soiree Society
- Th'YARC Playhouse & Arts Centre

Nova Scotia Music Week:

A full report on Bringin' It Home Presenter's involvement at Nova Scotia Music Week 2012 will be prepared for the Final 2012-13 Bringin' It Home Report in October 2013.

Nova Scotia Music Week 2012 had one of our largest attendances of Bringin' It Home presenters to date and resulted in about a dozen direct bookings for the 2012-13 BIH season.

Nova Scotia Music Week 2013 will have a specific focus on our domestic presenters, hosting the Domestic Presenters Summit, which will include training sessions, keynote speakers as well as speed meetings between local presenters and local artists.

Music Nova Scotia aims to engage the Bringin' It Home presenters in a more comprehensive way this year and offer more relevant programming for their needs.



REPORT CONTRIBUTORS

Assembled by

Blaise Theriault

Scott Long

Molson Canadian Nova Scotia Music Week Report

Serge Samson

Member Training Report

Sean MacGillivray

Technology Report

Laura Simpson

Export Development Program for Music Report

Bringin' It Home Community Presenters Assistance Program Report

Lisa Stitt

Membership Report

Financial Report



FINANCIAL STATEMENTS





Grant Thornton

Financial Statements

Music Industry Association of Nova Scotia

March 31, 2013

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Schedule 3 – Bringin' it Home revenue and expenditures (unaudited)	13

Independent auditor's report

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To the members of
Music Industry Association of Nova Scotia

We have audited the accompanying financial statements of Music Industry Association of Nova Scotia, which comprise the balance sheet as at March 31, 2013, March 31, 2012 and April 1, 2011, and the statements of revenues and expenses, net assets and cash flows for the years ended March 31, 2013 and March 31, 2012, and a summary of significant accounting policies and other explanatory information.

Management's responsibility for the financial statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with Canadian accounting standards for not-for-profit organizations, and for such internal control as management determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's responsibility

Our responsibility is to express an opinion on these financial statements based on our audits. We conducted our audits in accordance with Canadian generally accepted auditing standards. Those standards require that we comply with ethical requirements and plan and perform the audit to obtain reasonable assurance about whether the financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

We believe that the audit evidence we have obtained in our audits is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the financial statements present fairly, in all material respects, the financial position of Music Industry Association of Nova Scotia as at March 31, 2013, March 31, 2012 and April 1, 2011, and the results of its operations and its cash flows for the years ended March 31, 2013 and March 31, 2012 in accordance with Canadian accounting standards for not-for-profit organizations.



Halifax, Canada
June 10, 2012

Chartered Accountants

Music Industry Association of Nova Scotia

Statement of revenues and expenses

Year ended March 31

2013

2012

	2013	2012
Revenue		
Project revenue	\$ 970,383	\$ 903,627
Province of Nova Scotia -		
Department of Communities, Culture and Heritage	55,000	55,000
Foundation to Assist Canadian Talent on		
Records	30,000	30,000
Management and administration fees	6,273	37,941
Memberships	28,692	21,726
Interest income	4,136	3,620
Sponsorship	96,128	89,689
	<u>1,190,612</u>	<u>1,141,603</u>
Project expenditures	<u>992,146</u>	<u>899,539</u>
	<u>198,466</u>	<u>242,064</u>
Expenses		
Advertising and promotion	5,269	5,382
Bad debt (recovery)	763	(2,136)
Equipment rental	5,502	5,109
Insurance	3,431	3,603
Interest and bank charges	5,516	4,940
Legal and accounting	8,696	8,820
Miscellaneous	-	3,992
Occupancy	19,461	18,637
Office	13,301	10,290
Telephone	13,559	11,571
Travel	11,364	12,280
Wages and employee benefits	269,089	289,398
	<u>355,951</u>	<u>371,886</u>
Less: expenses allocated to project expenditures	<u>(155,460)</u>	<u>(130,380)</u>
	<u>200,491</u>	<u>241,506</u>
(Deficiency) excess of revenue over expenditures	\$ <u>(2,025)</u>	\$ <u>558</u>

See accompanying notes to the financial statements.

Music Industry Association of Nova Scotia

Balance sheet

March 31	March 31 2013	March 31 2012	April 1 2011
			(note 3)
Assets			
Current			
Cash and cash equivalents	\$ 158,286	\$ 164,022	\$ 179,412
Short term investments	83,947	82,909	77,445
Receivables	95,202	101,408	179,337
Prepays	<u>25,591</u>	<u>9,370</u>	<u>10,779</u>
	363,026	357,709	446,973
Advances to DRUM Live Inc. (note 5)	710,576	710,576	710,576
Funds held in trust (note 6)	<u>-</u>	<u>4,388</u>	<u>4,382</u>
	\$ <u>1,073,602</u>	\$ <u>1,072,673</u>	\$ <u>1,161,931</u>
Liabilities			
Current			
Payables and accruals	\$ 52,070	\$ 67,060	\$ 58,923
Deferred government assistance (note 4)	<u>154,393</u>	<u>132,061</u>	<u>230,020</u>
	206,463	199,121	288,943
Long term loans (note 5)	710,576	710,576	710,576
Funds held in trust (note 6)	<u>-</u>	<u>4,388</u>	<u>4,382</u>
	917,039	914,085	1,003,901
Net assets			
Unrestricted net assets (note 11)	37,097	39,122	78,564
Restricted net assets (note 7)	34,485	34,485	34,485
Contingency Fund (note 10)	<u>84,891</u>	<u>84,981</u>	<u>44,981</u>
	156,563	158,588	158,030
	\$ <u>1,073,602</u>	\$ <u>1,072,673</u>	\$ <u>1,161,931</u>

Contingency (note 9)

On behalf of the Board

_____ Member _____ Member

See accompanying notes to the financial statements.

Music Industry Association of Nova Scotia

Statement of net assets

Year ended March 31

	<u>Contingency Fund</u>	<u>Restricted net assets</u>	<u>Unrestricted net assets</u>	<u>2013</u>
Net assets, beginning of year	\$ 84,981	\$ 34,485	\$ 39,122	\$ 158,588
Deficiency of revenue over expenses	<u>-</u>	<u>-</u>	<u>(2,025)</u>	<u>(2,025)</u>
Balance, end of year	\$ <u>84,981</u>	\$ <u>34,485</u>	\$ <u>37,097</u>	\$ <u>156,563</u>

	<u>Contingency Fund</u>	<u>Restricted net assets</u>	<u>Unrestricted net assets</u>	<u>2012</u>
Net assets, beginning of year	\$ 44,981	\$ 34,485	\$ 78,564	\$ 158,030
Excess of revenue over expenses	-	-	558	558
Transfer from unrestricted fund	<u>40,000</u>	<u>-</u>	<u>(40,000)</u>	<u>-</u>
Balance, end of year	\$ <u>84,981</u>	\$ <u>34,485</u>	\$ <u>39,122</u>	\$ <u>158,588</u>

See accompanying notes to the financial statements.

Music Industry Association of Nova Scotia

Statement of cash flows

Year ended March 31

2013

2012

(Decrease) increase in cash and cash equivalents

Operating

(Deficiency) excess revenue over expenditures \$ (2,025) \$ 558

Change in non-cash operating working capital

Receivables 6,206 77,929

Prepays (16,221) 1,409

Payables and accruals (14,990) 8,137

Deferred government assistance 22,332 (97,959)

(4,698) (9,926)

Investing

Purchase of short term investments (1,038) (5,464)

Net decrease in cash and cash equivalents (5,736) (15,390)

Cash and cash equivalents

Beginning of year 164,022 179,412

End of year \$ 158,286 \$ 164,022

See accompanying notes to the financial statements.

Music Industry Association of Nova Scotia

Notes to the financial statements

March 31, 2013

1. Nature of operations

The Music Industry Association of Nova Scotia (the "Association") is a not-for-profit organization incorporated under the Societies Act of the Province of Nova Scotia and operating under the name Music Nova Scotia. The main objective of the Association is to democratically and independently determine elements required to develop the full potential of the music industry. It is the intention of the Association to create a healthier music industry by conducting educational activities, initiating programs, lobbying regulatory bodies, advising government and industry, and organizing and presenting Nova Scotia Music Week.

2. Summary of significant accounting policies

Basis of presentation

The Association has prepared these financial statements in accordance with Canadian Accounting standards for not-for-profit organizations ("ASNPO").

Cash and cash equivalents

Cash and cash equivalents include cash on hand and balances with banks. Bank borrowings are considered to be financing activities.

Financial instruments

Initial measurement

The Association's financial instruments are measured at fair value when issued or acquired. For financial instruments subsequently measured at cost or amortized cost, fair value is adjusted by the amount of the related financing fees and transaction costs. Transaction costs and financing fees relating to financial instruments that are measured subsequently at fair value are recognized in operations in the year in which they are incurred. The Association's financial instruments consist of cash and cash equivalents, short term investments, receivables and payables and accruals.

Short term investments are recorded at market value. The Association's short term investments consist of GIC's which have been set aside to fund the Contingency Fund.

Subsequent measurement

At each reporting date, the Association measures its financial assets and liabilities at cost or amortized cost (less impairment in the case of financial assets), except for equities quoted in an active market, which must be measured at fair value. The financial instruments measured at amortized cost are cash and cash equivalents, receivables and payables and accruals.

For financial assets measured at cost or amortized cost, the Association regularly assesses whether there are any indications of impairment. If there is an indication of impairment, and the Association determines that there is a significant adverse change in the expected timing or amount of future cash flows from the financial asset, it recognizes an impairment loss in the statement of operations. Any reversals of previously recognized impairment losses are recognized in operations in the year the reversal occurs.

Credit risk

The Association has determined that the financial assets with credit risk exposure are receivables since failure of any of these parties to fulfil their obligations could result in significant financial losses for the Association. The entity is also exposed to concentration risk in that all of its cash is held with one financial institution.

The Association is not exposed to significant interest rate risk, liquidity, market risk or other price risk.

Music Industry Association of Nova Scotia

Notes to the financial statements

March 31, 2013

2. Summary of significant accounting policies (continued)

Use of estimates

The preparation of the financial statements in conformity with Canadian generally accepted accounting principles, requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results may differ from these estimates. The most significant estimates in these financial statements include allowance for doubtful accounts.

Revenue recognition

The Association follows the deferral method of accounting for contributions. Unrestricted contributions are recognized as revenue when received or receivable when the amount to be received can be reasonably estimated and collection is reasonably assured.

Deferred government assistance relates to contributions received for specific projects for which the related expenses have not yet been incurred.

Investment income is recognized as it is earned.

Income taxes

The Association is a not-for-profit organization and as such, is not subject to income taxes.

3. First-time adoption of accounting standards for not-for-profit organizations

These financial statements are the Associations' first financial statements prepared using ASNPO. The date of transition to ASNPO is April 1, 2011. The accounting policies presented in note 2 to the financial statements were used to prepare the financial statements for the year ended March 31, 2013, the comparative information and the opening balance sheet as at the date of transition.

The adoption of ASNPO did not result in adjustments to the previously reported assets, liabilities, net assets, and excess of revenue over expenses of the Association. The transition to ASNPO did not result in any adjustments to the statement of cash flows.

Section 1501, *First-time adoption by not-for-profit organizations*, contains optional exemptions to full retrospective application of ASNPO which the Association may use upon transition. The Association elected not to use the exemptions at the date of transition to ASNPO, as there is no significant impact to the financial statements.

4. Deferred government assistance

Deferred government assistance relates to the various projects as follows:

	<u>March 31</u> <u>2013</u>	March 31	April 1
		<u>2012</u>	<u>2011</u>
Export Development Program	\$ 94,873	\$ 82,174	\$ 97,370
Bringin' it Home	56,108	48,571	85,552
JCP	3,412	-	-
Casino Nova Scotia	-	553	-
Nova Scotia Music Week	-	763	-
ECMA	-	-	1,500
Tourism Niche Marketing	-	-	40,598
Songwriter Camp	-	-	5,000
	<u>\$ 154,393</u>	<u>\$ 132,061</u>	<u>\$ 230,020</u>

Music Industry Association of Nova Scotia

Notes to the financial statements

March 31, 2013

5. Advances to DRUM Live Inc.

	<u>March 31</u> <u>2013</u>	March 31 <u>2012</u>	April 1 <u>2011</u>
Department of Economic Development	\$ 192,525	\$ 192,525	\$ 192,525
ACOA	<u>518,051</u>	<u>518,051</u>	<u>518,051</u>
	<u>\$ 710,576</u>	<u>\$ 710,576</u>	<u>\$ 710,576</u>

The above loans were negotiated to assist with the theatrical production of "DRUM - A Musical Tribute". These funds have been advanced to DRUM Live Inc. who has been contracted to produce the show. The Department of Economic Development loan is to be repaid in an amount equal to 2.5% of future gross profits generated from performances of the production. The ACOA loan is to be repaid in an amount equal to 2% of future gross profits generated from performances of the production. The advances to DRUM Live Inc. are to be collected on the same basis as the repayment of the Department of Economic Development and ACOA loans.

6. Funds held in trust

The Chico Berardi Memorial Fund assets were given to the Nova Scotia Talent Trust during the year.

7. Restricted net assets

Restricted net assets represent funds received which have been restricted for education programming.

8. Project revenue	<u>2013</u>	<u>2012</u>
Government funding included in project revenue	\$ <u>608,364</u>	\$ <u>701,663</u>

9. Contingency

The Association has entered into funding agreements with various government agencies. Funding received under these agreements is subject to repayment if the Association fails to comply with the terms and conditions of the agreements.

Music Industry Association of Nova Scotia

Notes to the financial statements

March 31, 2013

10. Contingency Fund

The Contingency Fund (the "Fund") was created in 2010 by the Association. This Fund shall be used and applied from time to time towards meeting future unforeseen deficits and such other significant unexpected liabilities or contingencies which may arise. The Association segregates amounts accumulated for these purposes. The Board of Directors will determine on an annual basis the amount to be contributed to the Fund out of any current operating surplus.

The Contingency Fund consists of short term investments in the amount of \$83,947 and cash and cash equivalents of \$1,034.

11. Unrestricted net assets

In 2012 the Association transferred \$40,000 in investments from the opening net assets to the Contingency Fund which is available to cover any project shortfalls.

12. Comparative figures

Certain comparative figures have been reclassified to conform with the financial statement presentation adopted for the current year.

Music Industry Association of Nova Scotia

Schedule 1 - Project revenue and expenditures

(Unaudited)

March 31

2013

2012

Project revenue

Nova Scotia Music Week (schedule 2)	\$ 264,848	\$ 213,720
Bringin' it Home (schedule 3)	92,463	126,315
Canadian Music Week	17,000	16,500
Casino Nova Scotia	137,047	18,422
Liverpool Sound City	-	13,223
Reeperbahn	10,300	13,650
Export development program	362,300	390,196
Titanic 100	27,165	24,300
East Coast Music Awards	2,823	9,480
Other	36,437	15,277
The Great Escape	20,000	18,946
Tourism Niche Marketing	-	43,598
	<u>970,383</u>	<u>903,627</u>

Project expenses

Nova Scotia Music Week (schedule 2)	270,465	219,336
Bringin' it Home (schedule 3)	92,463	126,315
Canadian Music Week	17,000	16,500
Casino Nova Scotia	137,047	18,422
Liverpool Sound City	-	13,223
Reeperbahn	10,300	13,650
Export development program	362,300	390,196
Titanic 100	38,286	12,605
East Coast Music Awards	4,488	9,480
Other	39,797	15,277
The Great Escape	20,000	20,937
Tourism Niche Marketing	-	43,598
	<u>992,146</u>	<u>899,539</u>

(Deficiency) excess of revenue over expenditures	\$ <u>(21,763)</u>	\$ <u>4,088</u>
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Music Industry Association of Nova Scotia

Schedule 2 – Nova Scotia Music Week revenue and expenditures

(Unaudited)

March 31

2013

2012

Revenue

Province of Nova Scotia –

Department of Communities, Culture and Heritage \$ 35,000 \$ 34,000

Department of Economic Development 24,403 5,000

Employment Nova Scotia - 1,985

ACOA 40,100 30,000

Foundation to Assist Canadian Talent of Records 36,467 22,527

Registration and ticket sales 39,845 41,508

Sponsorship 61,300 53,400

Program revenue 21,733 19,300

SOCAN Foundation 6,000 6,000

264,848 213,720

Expenses

Advertising 11,914 17,826

Bank charges 948 561

Consulting - 1,000

Meals and accommodations 52,887 37,713

Miscellaneous 6,246 4,232

Performance 34,535 29,469

Production equipment rental 106,011 96,891

Travel 48,309 25,097

Venue and food 7,661 5,360

Communications 1,954 1,187

270,465 219,336

Deficiency of revenue over expenditures

\$ (5,617)

\$ (5,616)

Music Industry Association of Nova Scotia

Schedule 3 – Bringin’ it Home revenue and expenditures

(Unaudited)

March 31	2013	2012
Revenue		
Nova Scotia Department of Communities, Culture and Heritage	\$ <u>92,463</u>	\$ <u>126,315</u>
Expenses		
Accommodations, meals and travel	2,656	2,945
Other	16	30
Production and performance	<u>89,791</u>	<u>123,340</u>
	<u>92,463</u>	<u>126,315</u>
Excess of revenue over expenditures	\$ <u>-</u>	\$ <u>-</u>

NEW MUSIC FRIDAYS

KUATO
11:30 PM - 12:30 AM
facebook.com/kuatoband

music NOVA SCOTIA

PATRICK HEALY'S LAZARUS PROJECT
10:30 PM - 11:15 PM
patrickhealysproject.com

NEIGHBOURS
9:30 PM - 10:15 PM
facebook.com/neighborsband

CASINO NOVA SCOTIA HARBOURFRONT LOUNGE
FRIDAY MAY 31st | 9PM | FREE!

NEW MUSIC FRIDAYS

SOHO GHETTO
11:30 PM - 12:30 AM
sohoghetto.com

music NOVA SCOTIA

MORGAN MACDONALD
10:30 PM - 11:15 PM
morganmacdonald.com

THE WYNDHOLMES
9:30 PM - 10:15 PM
thewyndholmes.com

CASINO NOVA SCOTIA HARBOURFRONT LOUNGE
FRIDAY APRIL 12th | 9PM | FREE!

Kitchen Party Thursdays

Traditional Nova Scotian music and dance!
THE WORRY BIRDS, JEREMY KEDDY GREENE SCHOOL OF IRISH DANCE and THE DARTMOUTH & DISTRICT PIPE BAND
special guests **CASSIE ANNE McDONALD**

FREE ADMISSION! Thursday August 30th 7-8:30PM
at Casino Nova Scotia's gorgeous Harbourfront Lounge

NEW MUSIC FRIDAYS

STEVE GATES
11:45 PM - 12:30 AM
stevegates.com

music NOVA SCOTIA

DANIELLE SMITH
10:30 PM - 11:15 PM
danielle-smith.com

MAGNOLIA
9:30 PM - 10:15 PM
magnolia.com

CASINO NOVA SCOTIA HARBOURFRONT LOUNGE
FRIDAY MARCH 1st | 9PM | FREE!

NEW MUSIC FRIDAYS

CARMEN TOWNSEND
11:30 PM - 12:30 AM
carmen-townsend.ca

music NOVA SCOTIA

FLOODLAND
10:30 PM - 11:15 PM
floodland.com

ROB ANDERSON & THE WINDTHROWS
9:30 PM - 10:15 PM
rob-anderson.com

CASINO NOVA SCOTIA HARBOURFRONT LOUNGE
FRIDAY APRIL 26th | 9PM | FREE!

NEW MUSIC FRIDAYS

CELTIC RANT
11:30 PM - 12:30 AM
celticrant.com

music NOVA SCOTIA

MATTHEW HORNELL
10:30 PM - 11:15 PM
matthewhornell.com

DUSTY KELEHER
9:30 PM - 10:15 PM
dustykeleher.com

CASINO NOVA SCOTIA HARBOURFRONT LOUNGE
FRIDAY MARCH 15th | 9PM | FREE!

NEW MUSIC FRIDAYS

ALRIGHT ALREADY
11:50 PM - 12:30 AM
alrightalready.com

music NOVA SCOTIA

LEAD MULE
10:30 PM - 11:15 PM
leadmule.com

TARYN KAWAJA
9:30 PM - 10:15 PM
tarynkawaja.com

PIONEER VIDEO
10:30 PM - 11:15 PM
pioneer-video.com

CASINO NOVA SCOTIA HARBOURFRONT LOUNGE
FRIDAY MAY 17th | 9PM | FREE!

MOLSON CANADIAN NOVA SCOTIA MUSIC WEEK PRESENTS

BANGERS & MOSH

BRUNCH & SHOWCASE AT THE GREAT ESCAPE

Menu:
12:00PM - 12:45PM Brunch Mo Kenney @mo_kenney
12:45PM - 1:15PM AA Wallace @aawallace
1:45PM - 2:15PM Cousins @cousinscousins
2:45PM - 3:15PM

Friday May 17th 2013
Canada House (Blind Tiger Club, 52-54 Grand Parade, Brighton)

FACTOR

NEW MUSIC FRIDAYS

ASIA & NUGRUV
11:30 PM - 12:30 AM
asiandnugruv.com

music NOVA SCOTIA

KALEB SIMMONDS
10:30 PM - 11:15 PM
kaleb-simmonds.com

LAURA ROY
9:30 PM - 10:15 PM
lauraroy.com

CASINO NOVA SCOTIA HARBOURFRONT LOUNGE
FRIDAY JUNE 7th | 9PM | FREE!

NEW MUSIC FRIDAYS

THE REGAL BEAGLE BAND
11:30 PM - 12:30 AM
theregalbeagleband.com

music NOVA SCOTIA

STEADY HILLS
10:30 PM - 11:15 PM
steadyhills.com

CHRISTINE CAMPBELL
9:30 PM - 10:15 PM
christinecampbell.com

CASINO NOVA SCOTIA HARBOURFRONT LOUNGE
FRIDAY APRIL 19th | 9PM | FREE!

MUSICNOVASCOTIA.CA

NEW MUSIC FRIDAYS

THE SHAKEDOWN COMBO
11:30 PM - 12:30 AM
theshakedowncombo.com

music NOVA SCOTIA

THE WILL BE GONES
10:30 PM - 11:15 PM
thewillbegones.com

THE WHISKEY KISSES
9:30 PM - 10:15 PM
thewhiskeykisses.com

CASINO NOVA SCOTIA HARBOURFRONT LOUNGE
FRIDAY FEBRUARY 22nd | 9PM | FREE!

NEW MUSIC FRIDAYS

CASSIE AND MAGGIE
11:30 PM - 12:30 AM
cassieandmaggie.com

music NOVA SCOTIA

MAXIM GORMIER
10:30 PM - 11:15 PM
maximgormier.com

SHANNON QUINN
9:30 PM - 10:15 PM
shannonquinn.com

CASINO NOVA SCOTIA HARBOURFRONT LOUNGE
FRIDAY MAY 24th | 9PM | FREE!

MUSIC NOVA SCOTIA and CASINO NOVA SCOTIA presents

TAKE IT TO THE TIKI FRIDAY NIGHT FIGHTS

12 HEAVYWEIGHT STARS COMPETING HEAD TO HEAD FOR HONOUR AND GLORY (AND PRIZES)

FREE! JANUARY 4th THRU 26TH AT CMW 2013

apply on-line at **MUSICNOVASCOTIA.CA**

Free! at CASINO NOVA SCOTIA HARBOURFRONT LOUNGE

NEW MUSIC FRIDAYS

WITCHITAW
11:30 PM - 12:30 AM
witchitaw.com

music NOVA SCOTIA

MARK CAMERON
10:30 PM - 11:15 PM
markcameronmusic.com

PRETTY ARCHIE
9:30 PM - 10:15 PM
prettyarchie.com

CASINO NOVA SCOTIA HARBOURFRONT LOUNGE
FRIDAY FEBRUARY 8th | 9PM | FREE!

NEW MUSIC FRIDAYS

COUSINS
11:30 PM - 12:30 AM
cousinsmusic.com

music NOVA SCOTIA

HIND LEGS
10:30 PM - 11:15 PM
hindlegs.com

PIONEER VIDEO
9:30 PM - 10:15 PM
pioneer-video.com

CASINO NOVA SCOTIA HARBOURFRONT LOUNGE
FRIDAY NOVEMBER 30th | 9PM | FREE!

NEW MUSIC FRIDAYS

JON MCKIEL
11:30 PM - 12:30 AM
jonmckiel.com

music NOVA SCOTIA

BAD VIBRATIONS
10:30 PM - 11:15 PM
badvibrationsband.com

DANCE MOVIE
9:30 PM - 10:15 PM
dancemovieband.com

CASINO NOVA SCOTIA HARBOURFRONT LOUNGE
FRIDAY FEBRUARY 1st | 9PM | FREE!

NEW MUSIC FRIDAYS

DARREN McMULLEN COLIN GRANT JASON MACDONALD
11:30 PM - 12:30 AM
darrenmcmullen.com | colingrant.ca | jasonmacdonald.com

music NOVA SCOTIA

CASINO NOVA SCOTIA HARBOURFRONT LOUNGE
FRIDAY APRIL 5th | 9PM | FREE!

CANADIAN NOVA SCOTIA MUSIC WEEK

BACK TO THE BEACH

LIVERPOOL, NS NOVEMBER 8 - 11 2012

Get involved! Apply online to volunteer: **www.nsmw.ca**

SPONSORS: SOCAN, BANK, WHITE POINT, CKBW, NSLC, FACTOR, ADVANCE, Bell Aliant

NEW MUSIC FRIDAYS

GABRIEL MINNIKIN
11:30 PM - 12:30 AM
gabrielminnikin.com

music NOVA SCOTIA

LAURA MERRIMEN & THE HARD TICKETS
10:30 PM - 11:15 PM
lauramerrimen.com

HEARTBREAKA STRANGER
9:30 PM - 10:15 PM
heartbreakastranger.com

CASINO NOVA SCOTIA HARBOURFRONT LOUNGE
FRIDAY MAY 10th | 9PM | FREE!

NEW MUSIC FRIDAYS

THE STOGIES
11:45 PM - 12:30 AM
thestogies.com

music NOVA SCOTIA

SPACE AGE
10:30 PM - 11:15 PM
spaceageband.com

CHAD PECK
9:30 PM - 10:15 PM
chadpeck.com

MONOMYTH
10:15 PM - 10:45 PM
monomyth.com

CASINO NOVA SCOTIA HARBOURFRONT LOUNGE
FRIDAY MAY 3rd | 9PM | FREE!