



Economic Impact Statement of the East Coast Music Association

Report

Presented to the East Coast Music Association



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Executive Summary

This report presents an economic impact statement of the East Coast Music Association for fiscal years 2007 and 2008.

The East Coast Music Association is a regional collaboration of people in the music industry of Atlantic Canada. The organization's focus is to foster, develop, promote and celebrate its music locally and globally. Among other things, the ECMA supports Atlantic Canada's music industry and professional musicians in their efforts to access international markets and to enter into commercial agreements.

In preparing the economic impact statement, the consultant examined the direct impacts of the ECMA and estimated some of the indirect impacts. The consultant made no attempt to measure the related social and cultural benefits.

The consultant used a number of research tools, namely a survey of East Coast and international delegates, a document review and analysis as well as four (4) case studies. The four case studies artists are: **The Barra McNeils** (Nova Scotia), **Catherine MacLellan** (Prince Edward Island), **Duane Andrews** (Newfoundland & Labrador) and **Matt Andersen** (New Brunswick).

The evidence shows that a reasonable estimate of direct sales by Atlantic-based artists and companies as a result of participating in the 2007 and 2008 ECMA activities is \$988,337.

In addition, the total amount of in-Atlantic ECMA operating expenditures over the same two-year period is estimated at \$3,725,764.

The net inflow of dollars from visitors to the Atlantic region as a result of the 2007 and 2008 ECMA Festival and Conference is estimated at \$ 490,000.

The combined direct impact of the ECMA is the sum of these three amounts. It represents a total of \$5,214,101.

To estimate the indirect impacts, three distinct multipliers were chosen and applied to the various expenditure categories. The result is a total estimated economic impact of **\$7,989,021** during the 2 years under review.

This figure does not include indirect sales by Atlantic-based artists and companies. In this regard, the case studies provide compelling evidence that direct, ECMA-related sales give rise to significant indirect sales, which, in our opinion could bring the total impact well within the **\$ 10 million range** for 2007 and 2008. A real figure may well be significantly higher, but stated with less confidence.

1. Introduction

1.1 Background

The purpose of this report is to present an **economic impact statement** of the East Coast Music Association (ECMA).

The ECMA is a regional collaboration of people in the music industry of Atlantic Canada. The organization fosters, develops, promotes and celebrates East Coast music locally and globally.

The organization's main event is the East Coast Music Festival and Conference. Held every year in a different Atlantic Canadian city, it has become a leading national and international music industry trade event. The ECMA is also committed to developing and assisting Atlantic Canadian artists and businesses succeed in Canadian and International music markets.

In 2003, the ECMA launched an overall Strategic Plan, which is comprised of five core focuses, including an "international business export development" component. From 2003 to 2008, the organization worked with provincial and federal government partners to conduct trade missions to international music trade events for business and pursue market intelligence activities.

In 2005, the ECMA approached the Canada/Atlantic Cooperation Agreement on International Business Development (IBDA) to support a three-year (2005-2008) International Export Strategy. The estimated total cost of the Strategy was \$1,207,300, including contributions from government, industry and corporate partners.

The central objectives of this Strategy were:

- to develop and increase the number of new exporting artists and companies in Atlantic Canada;
- to diversify the markets of current exporters; and
- to develop a stronger culture of exporting throughout the region.

To achieve the stated objectives, the ECMA designed its Strategy around five (5) key themes:

- International Business Development Activities (ECMA International Program);
- International Trade Missions;
- Sector Capacity Development and Training;
- Market Information and Intelligence;
- Planning and Research.

As part of the Strategy the ECMA sponsored or arranged participation in the following key international trade events in Canada and abroad.

Domestic		
Year	Activity	Location
2007	ECMA	Halifax, NS
2007	Atlantic Film Festival	Halifax, NS
2008	ECMA	Fredericton, NB
2008	Atlantic Film Festival	Halifax, NS

International			
Year	Priority Activity	Month	Location
2007	NAFA*	March	Memphis, Ten
2008	NAFA*	March	Memphis, Ten

* North American Folk Alliance

1.2 Consultant's mandate

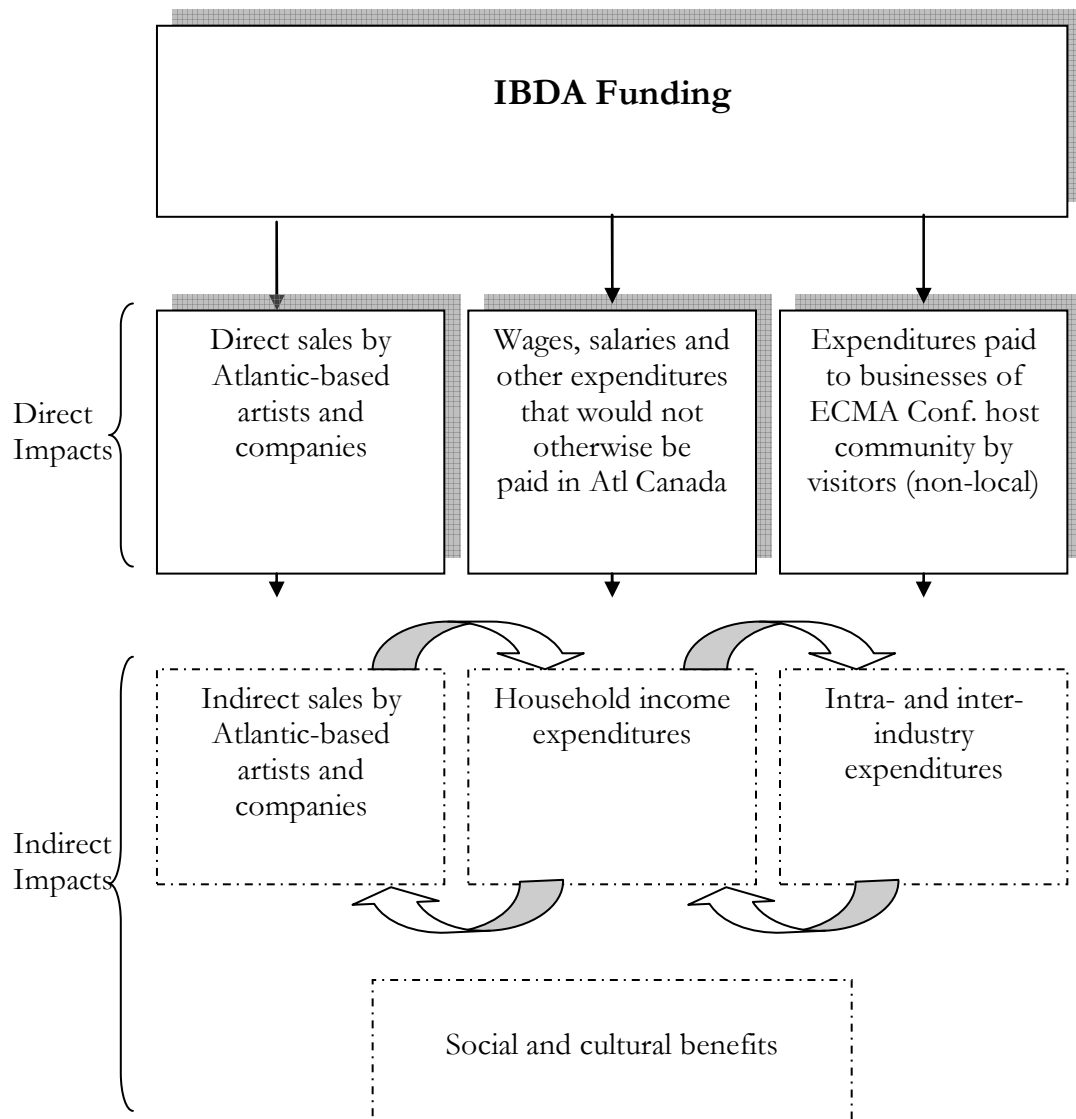
The purpose of this project is to provide a statement of the impact of the ECMA on the economy of the Atlantic provinces for calendar years 2007 and 2008.

The ECMA impacts economic activity in a number of ways. First, it does so through direct sales by Atlantic-based artists and companies to buyers from outside the Atlantic region. Other direct impacts can be attributed to wages, salaries and other expenditures, including expenditures paid to businesses in the ECMA host communities by visitors whose decision to come is primarily determined by the presence of the ECMA event.

These sales, wages and expenditures also create an indirect economic multiplier effect on the local economy, which arises from spending by employees and out-of-town visitors. Arguably, there are also indirect social and cultural benefits.

The following graph provides a model of how the ECMA, through IBDA funding, generates economic activity, both direct and indirect.

Exhibit 1 – ECMA Economic Impact Model



1.3 Methodology

In preparing the economic impact statement, the consultant focused on the direct impacts of the ECMA and estimated some of the indirect impacts as well. However, the consultant made no attempt to measure the related social and cultural benefits.

Direct sales data was obtained through an **Internet-based survey** of 160 individuals. The following table presents a breakdown of the survey respondents by location of principal residence.

Exhibit 2 – Survey sample

	Survey population	Number surveyed	Percentage of category population	Percentage of total population
Domestic	89	49	55.1%	30.6%
International	71	34	47.9%	21.3 %
Total	160	83		51.9%

Appendix A presents a more details on the profile of survey participants.

The survey was also an opportunity to collect success stories.

To measure other direct impacts (i.e., operating, capital and visitor expenditures), the consultants prepared an input data set (see Appendix B)¹ and submitted it to the ECMA. Since ECMA was able to provide only a portion of the requested data, some assumptions had to be developed. The assumptions used are outlined in the relevant sections of this report.

The indirect impacts were measured using what is known as the multiplier effect. The researcher used multipliers from the input-output (IO) model developed and maintained by Statistics Canada.

Also, recognizing the value of qualitative information in assessing indirect impacts, the consultant conducted four (4) case studies. The case studies artists were **The Barra McNeils** (Nova Scotia), **Catherine McLellan** (Prince Edward Island), **Duane Andrews** (Newfoundland & Labrador) and **Matt Andersen** (New Brunswick). The consultant also interviewed some of the artists' associates or buyers. The case studies provide a deeper understanding of the conditions that allow some Atlantic-based artists or companies to succeed.

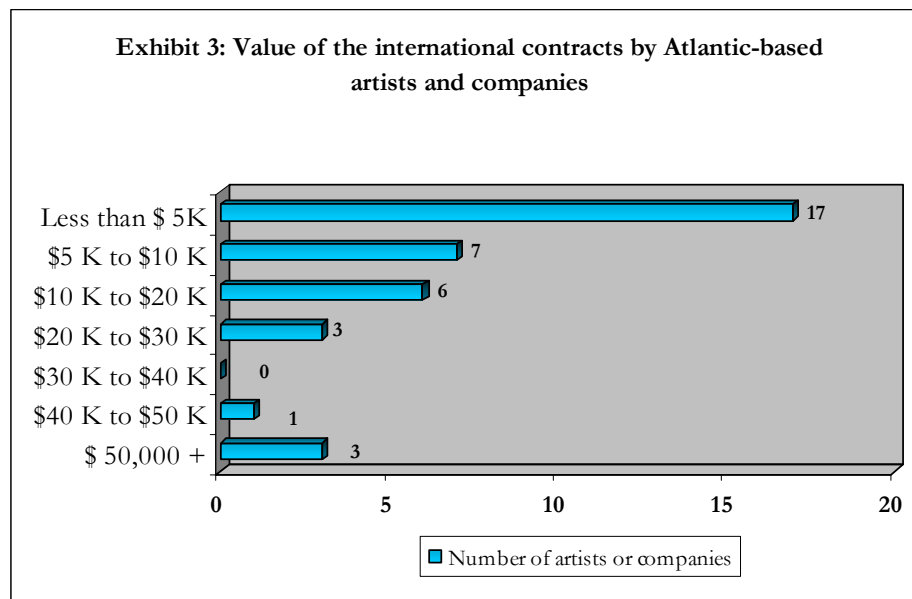
Appendix C contains the list of documents consulted throughout the research project.

¹ The input data set was developed using the Canadian Sport Tourism Alliance Economic Impact Assessment Model (see http://canadiansporttourism.com/eng_home.cfm)

2. Direct Impacts

2.1 Direct sales

Atlantic-based artists and companies who reported having successfully negotiated international contracts were asked to provide the estimated total value of those contracts. The value of contracts negotiated represents direct investment and purchase of product, services and intellectual properties. Exhibit 3 provides a detailed breakdown of the 37 responses obtained.



To establish the total value of sales for this group of respondents, we use the average within each range of answers and multiply it by the corresponding number²:

$$(\$2.5\text{K} \times 17) + (\$7.5\text{K} \times 7) + (\$15\text{K} \times 6) + (\$25\text{K} \times 3) + (\$45\text{K} \times 1) + (\$75,000 \times 3) = \mathbf{\$425,000}$$

Based on this calculation, a reasonable minimum is **\$425,500** in sales. This figure is a reasonable minimum because it considers only a sample of about 42% of the artists or companies who took part in ECMA activities (37 respondents out of a survey population of 86). If the other 58% (or 49 artists or companies) were as successful as their colleagues, then it is reasonable to conclude that this group would have generated approximately **\$562,837** in additional direct sales. The total estimated direct sales are the sum of those two amounts: **\$988,337**.

These sales are assumed to be directly attributable to East Coast artists and companies participating in the ECMA Festival and Conference, the Atlantic Film Festival and the North American Folk Alliance over a two-year period (2007 and 2008).

² For the “Less than \$5,000” category, we assume an average of \$2,500. For the “\$50,000 +” category, we assume an average of \$75,000.

2.2 ECMA Operating Expenditures

From a financial point of view, the ECMA is divided into two distinct entities: the operating ECMA office in Charlottetown and the Festival and Conference, which is held in a different Atlantic city every year.

**Exhibit 4: Operating Expenditures for Association and Show and Conference
Year 2007 & 2008**

Expenditure Line Item	Total Expenditure	Paid in Atlantic %	In Atlantic Expenditure
Association			
Insurance	\$ 8 108	50%	\$ 4 054
International programs	\$ 669 418	75%	\$ 502 064
Legal and accounting	\$ 41 171	100%	\$ 41 171
Marketing	\$ 27 950	100%	\$ 27 950
Meeting and travel	\$ 231 088	90%	\$ 207 979
Miscellaneous	\$ 24 148	80%	\$ 19 318
Office and administration	\$ 21 378	100%	\$ 21 378
Office equipment	\$ 10 673	100%	\$ 10 673
Postage and courier	\$ 22 574	100%	\$ 22 574
Printing	\$ 28 417	100%	\$ 28 417
Rent	\$ 40 700	100%	\$ 40 700
Salaries, honorariums and benefits	\$ 407 598	100%	\$ 407 598
Strategic planning	\$ 18 732	100%	\$ 18 732
Telephone and Internet	\$ 68 094	100%	\$ 68 094
Web site and technology	\$ 26 199	75%	\$ 19 649
Award show and Conference			
Awards show	\$ 742 315	75%	\$ 556 736
Communications and media	\$ 675 777	100%	\$ 675 777
Conferences	\$ 51 809	90%	\$ 46 628
Fundraising	\$ 35 351	100%	\$ 35 351
Hospitality and post awards party	\$ 13 156	100%	\$ 13 156
Industry brunch	\$ 52 149	100%	\$ 52 149
Office and administration	\$ 151 285	100%	\$ 151 285
Pre-promotion	\$ 21 358	100%	\$ 21 358
Soundwave-soundoff initiatives	\$ 15 132	100%	\$ 15 132
Staff	\$ 457 209	100%	\$ 457 209
Stages	\$ 117 970	100%	\$ 117 970
Technical	\$ 95 318	100%	\$ 95 318
Transportation	\$ 33 421	100%	\$ 33 421
Volunteers	\$ 13 922	100%	\$ 13 922
Total			\$ 3 725 764

The consultant examined the expenditure line items for both entities and included those deemed relevant to the study of economic impact.

Exhibit 4 above shows the total amount of expenditure over a two-year period (2007 and 2008) as well as ECMA management's estimate of the percentage of these expenditures paid to Atlantic individuals or businesses. The column on the right shows the dollar amount that these in-Atlantic payments represent.

2.3 ECMA Capital Expenditures

In estimating economic impact, the consultant also considered capital expenditures. The information gathered for this study revealed no capital expenditures during fiscal years 2007 and 2008.

2.4 Visitor Expenditures

As illustrated in Exhibit 1, artists' sales and operating expenditures of the ECMA are not the sole income generating sources attributable to the presence of the ECMA. Each year, a community in the Atlantic region is host to a five-day Festival and Conference event. During this period, the host community welcomes delegates or attendees from outside the Atlantic region. Expenditures by visitors who travel to these communities primarily motivated by the ECMA Festival and Conference represent a source of income for the Atlantic region.

The following exhibit represents the estimated visitor expenditures at the 2008 ECMA Festival and Conference in Fredericton, New Brunswick.

Exhibit 5: Visitor Expenditures (Fredericton 2008)

	Registered Delegates	Attendees
Total estimated number of persons	1 600	2 000
Est. number of self-paying delegates (international)	5	
Est. number of self-paying delegates (domestic non-Atl)	190	
Est. number of attendees from outside Atlantic		100
Sub-total	195	100
Est. Daily Expenditures (\$)	200	200
Estimated length of stay (days)	4	4
Total estimated visitor expenditure (direct impact)	\$ 156 000	\$ 80 000

Exhibit 5 shows the net inflow of dollars to the Atlantic region as a result of the 2008 ECMA Festival and Conference in Fredericton is approximately **\$ 236,000**. This table assumes the following³:

- Number of self-paying delegates from outside the Atlantic region (195)
- Number of attendees from outside the Atlantic region (100)
- Daily expenditures (\$200)
- Length of stay (4 days)

In this calculation, we only consider the number of attendees from outside the Atlantic region because Atlantic-based attendees do not contribute to the net inflow of dollars to the region.

Similarly, the calculation only considers international and domestic delegates who are self-paying. The reason is that the money spent by delegates who are ECMA-subsidized is considered to have been counted as part of the ECMA's operating expenditures (Exhibit 4).

This being said, with respect to subsidized international delegates, ECMA only funds approximately 75% of their expenses. Therefore, at least part of the remaining 25% must be added to the calculation.

During the four-day ECMA Festival and Conference in Fredericton in 2008, there were approximately 45 subsidized international delegates each spending about \$50 of their own money on food, beverages, lodging and transportation ($\$200 \times 25\% = \50) each day. This represents an additional net inflow of approximately **\$9,000**.

The total visitor expenditures at the ECMA Festival and Conference in Fredericton in 2008 are therefore in the vicinity of **\$245,000** ($\$236,000 + \$9,000$).

For the purpose of this calculation, we also assume that the 2007 ECMA Festival and Conference in Halifax, Nova Scotia, produced the same amount of visitor expenditures.

The total visitor expenditures for fiscal years 2007 and 2008 are therefore estimated at **\$ 490,000**

2.5 Total Direct Impact Estimates

Based on the stated methodology and assumptions, it is estimated that the total direct impact of the ECMA during 2007 and 2008 is \$ 6,538,764. This calculation is summarized in Exhibit 6 below.

³ Assumptions were made using ECMA internal data.

Exhibit 6: Total Direct Economic Impact Attributed to the ECMA for Years 2007 & 2008

Direct sales	Operating Expenditures	Visitor Expenditures	Total
\$	\$	\$	\$
998 337	3 725 764	490 000	5 214 101

3. Indirect Impacts

3.1 Multiplier Effect

The calculation of indirect impacts is useful because it recognizes how direct expenditures move through the economy and it acknowledges the interdependence of different economic sectors within a region. For example, when delegates at the ECMA Festival and Conference consume food and beverages, Atlantic farmers and manufacturers derive a certain benefit. Typically, the more regional goods and services are used, the more the indirect impacts are high, and the less so-called “slippage” occurs.

This number used to calculate indirect impacts is a statistical mathematical measure known as the multiplier effect.

Embodied in each multiplier are a series of assumptions that can be subject to considerable debate. As mentioned previously, for this study, the researcher used multipliers from the input-output (IO) model developed and maintained by Statistics Canada.

Three (3) distinct multipliers were chosen to reflect different types of economic activity. A first multiplier was applied to wages derived by Atlantic-based artists and companies as a result of successfully negotiated contracts with international delegates. A second was applied to all ECMA operating expenses. Finally, a third multiplier was applied to the estimated visitor expenditures. The following table shows the value of each multiplier by each type of industry for reference year 2002.

Type of expenditure	Industry	Multiplier
Wages to Atlantic-based artists and companies	Recreation	1.68
ECMA operating revenue	Administrative	1.46
Visitor spending	Accommodation and Food	1.78

Source: Statistics Canada

Exhibit 7 below applies the multipliers to the estimated amount of each expenditure category. The result is a total estimated economic impact of \$7,989,021 during the 2 years under review.

**Exhibit 7: Total Estimated Economic Impact Attributed to the ECMA
Year 2007 & 2008**

Direct sales			Operating Expenditures			Visitor Expenditures			Total
Amount	Multiplier	Sub Total	Amount	Multiplier	Sub Total	Amount	Multiplier	Sub Total	
\$		\$	\$		\$	\$		\$	\$
998 337	1.68	1 677 206	3 725 764	1.46	5 439 615	490 000	1.78	872 200	7 989 021

3.2 Case Studies

As part of this Economic Impact Statement, the consultant prepared four (4) case studies. The purpose of the case studies was to try to capture impacts that are not easily quantifiable. For example, the consultant tried to gain a better understanding if and how ECMA-related export deals lead to other opportunities (indirect sales) or contacts.

As mentioned previously, the case studies involved four artists or groups: **The Barra McNeils** (Nova Scotia), **Catherine McLellan** (Prince Edward Island), **Duane Andrews** (Newfoundland & Labrador) and **Matt Andersen** (New Brunswick).

The individuals interviewed for the case studies are listed in Appendix D. The case studies themselves can be found in Appendix E.

The case studies exposed numerous examples of how the Atlantic Canadian economy benefits indirectly from the ECMA.

Firstly, when East Coast artists travel outside the region, they need to purchase various types of services: van rental, gasoline, plane tickets, hotel rooms, food. These expenditures are perceived by many to be part of the economic spin off of the ECMA's. Although these transactions do create economic activity, they do not necessarily represent a net inflow of dollars to the region.

Secondly, according to several respondents, East coast artists and companies who succeed in international markets stand a better chance of elevating their notoriety domestically. In other words, international artistic acknowledgment makes an artist more appealing at home.

The information gathered for the case studies also points to the critical importance of several subsidy programs for the development of international careers of East coast artists and companies. Without the support of agencies like FACTOR, the Radio Starmaker Fund and provincial funding programs in New Brunswick, Nova

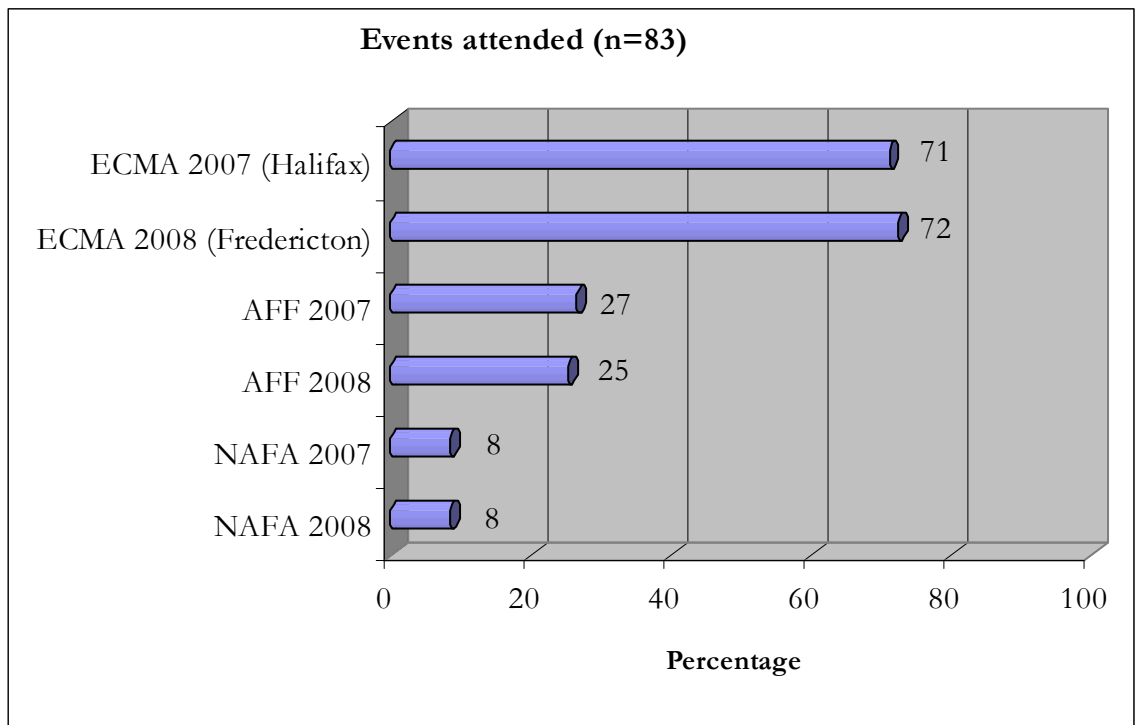
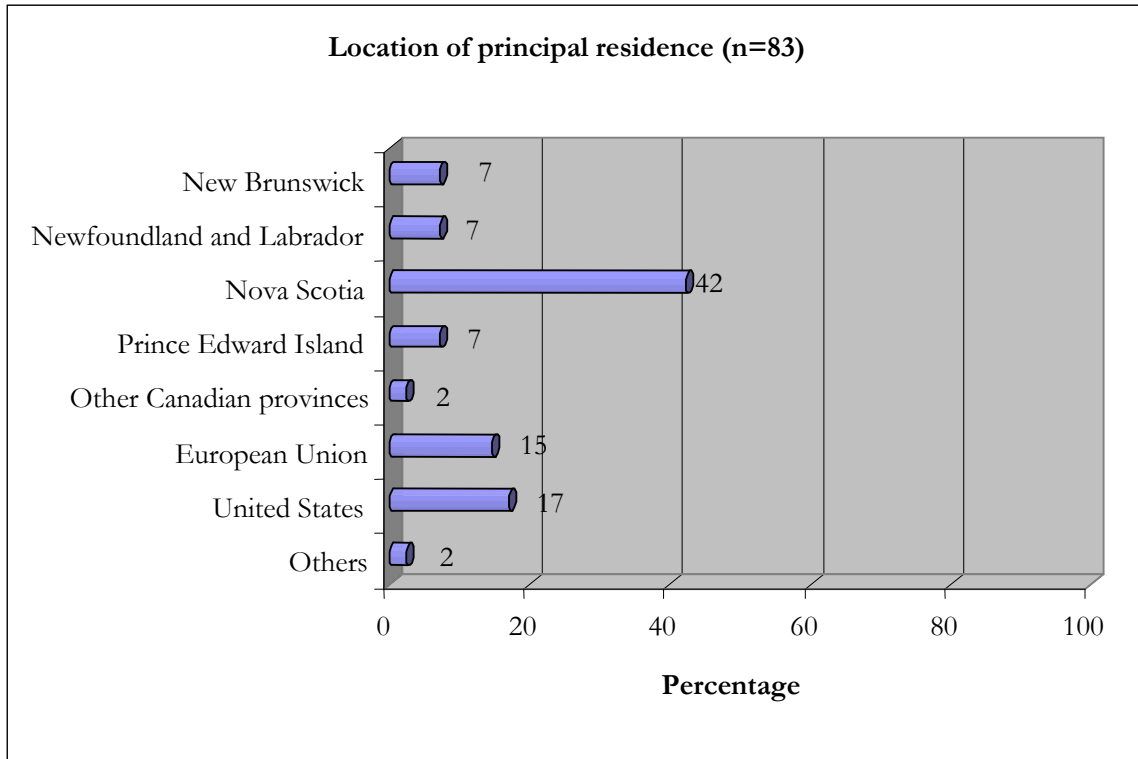
Scotia, Prince Edward Island and Newfoundland and Labrador it would have been considerably more difficult for most case study artists to cover basic touring costs. According to most respondents, these funding sources are essential for raising the profile of emerging artists and creating opportunity.

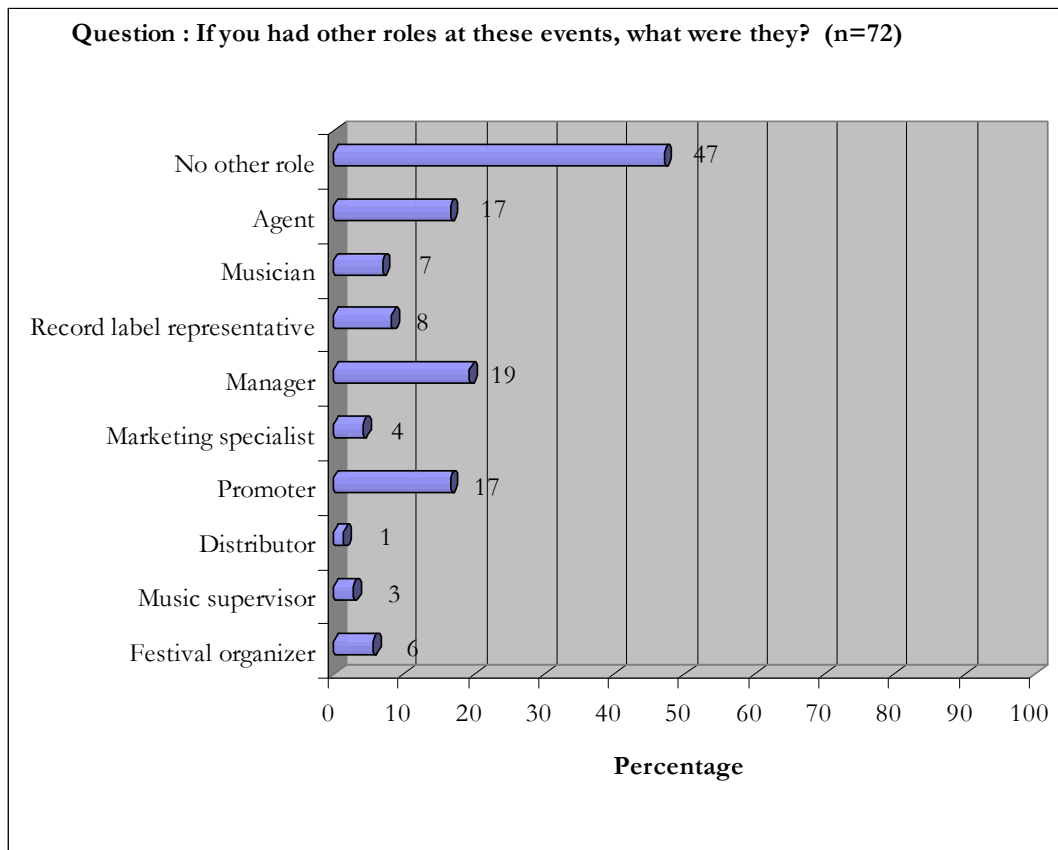
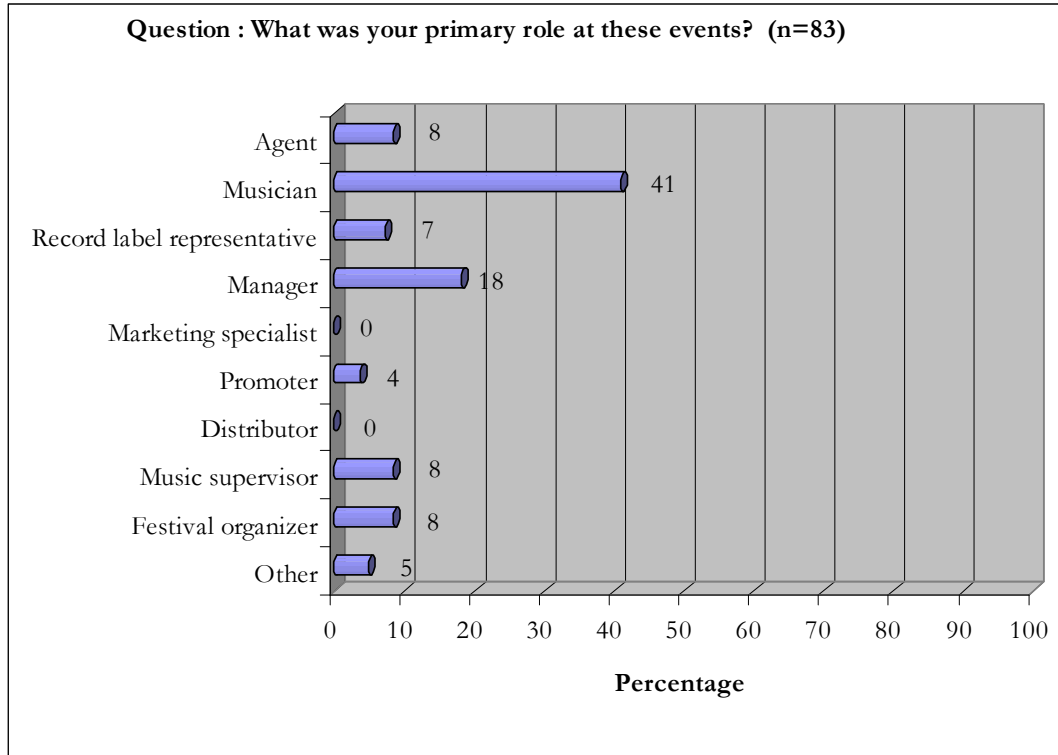
Finally, and perhaps most importantly, the case studies unveiled many examples of how one international opportunity leads to others. During her recent tour of the UK and Sweden, Catherine MacLellan was prominently featured in the British media and her European booking agent is already talking about a second tour. The Barra McNeils' early exposure in the US eventually led them to booking agent Tim Drake, which, in turn, paved the way to a growing presence in that country. Matt Andersen was completely unknown in the UK until he met Bob Paterson of The Bob Paterson Agency. Since then, his following in that country has been growing. He has also been featured on the front page of the London Times and has played live on the BBC. These stories provide compelling evidence that direct, ECMA-related sales do give rise to significant indirect sales.

In our opinion the indirect sales could bring the total economic impact of the ECMA within the **\$ 10 million range**. A real figure may well be significantly higher, but stated with less confidence.

* * *

Appendix A - Profile of Survey Participants





Appendix B – Input Data Set for Various Expenditures

VISITOR DATA

Delegates (not paid by ECMA)

- Estimated number of out-of-town delegates
- Origin of out-of-town delegates (domestic Atlantic, domestic non-Atlantic, USA, Int'l)
- Overnight delegates (percentage of out-of-town delegates who stayed overnight at the events)
- Delegate length of stay (number of days an out-of-town delegate spent in the host community)
- Number of same-day trips (number of day trips a same-day delegates made over the course of the event)

Spectators

- Estimated number of out-of-town spectators
- Origin of out-of-town spectators (domestic Atlantic, domestic non-Atlantic, USA, Int'l)
- Overnight spectators (percentage of out-of-town delegates who stayed overnight at the events)
- Spectator length of stay (number of days an out-of-town delegate spent in the host community)
- Number of same-day trips (number of day trips a same-day spectators made over the course of the event)

Media / VIP (not paid by ECMA)

- Estimated number of out-of-town Media / VIP
- Origin of Media / VIP (domestic Atlantic, domestic non Atlantic, USA, Int'l)
- Overnight Media / VIP (percentage of out-of-town Media / VIP who stayed overnight at the events)

- Media / VIP length of stay (number of days an out-of-town Media / VIP spent in the host community)
- Number of same-day trips (number of day trips a same day Media / VIP made over the course of the event)

OPERATING EXPENDITURES

- Salaries, Fees, & Commissions (all wage costs of employees hired directly by and working for the ECMA's)
- Advertising (any marketing or advertising costs incurred by the ECMA)
- Professional services (the costs of consultants, architects, planners, etc. hired by the ECMA's)
- Financial services fees and commissions paid to accountants, investment managers, bankers, etc.
- Insurance (any insurance costs associated with the event)
- Rent / Lease (costs associated with renting / leasing office space and / or event venues)
- Other Business Services (e.g. security, web site development and maintenance, catering, etc.)
- Communication costs (telecommunication, courier and mail expenses)
- Energy and Other Utilities
- Guest Room Supplies
- Office Supplies
- Other Supplies
- Repairs
- Food & Beverages – ECMA (Costs of food and beverages provided by the organizing committee, with the exception of food and beverages purchased directly for participants. An example would be food purchased for volunteers)

- Food & Beverages – Delegates (Cost of food and beverages purchased for delegates that is paid for by the ECMA)
- Food & Beverages – Media / VIP (cost of food and beverages purchased for Media / VIPs that is paid for by the ECMA)
- Accommodations (costs of accommodations purchased for the ECMA organizers, delegates, Media / VIP)
- Merchandise Costs
- Personal Travel (cost of any travel undertaken by ECMA organizers only)
- Transportation & Storage (any costs incurred for transportation or storage, for example the cost of a shuttle bus service. These should be expenses paid for services rendered to the organizing committee only, and should not include commercial carrier fares paid on behalf of participants.)
- Taxes paid (HST, PST, Property etc.)

CAPITAL EXPENDITURES

- Buildings and renovations (expenditures on the construction or renovations of buildings)
- Machinery and equipment (any machinery and equipment purchased that will remain after the event e.g. stage)
- Furniture and fixtures (any furniture or fixtures purchased for the event)
- Transportation equipment (any transportation equipment purchased for the event)
- Other supplies (any miscellaneous supplies purchased as a part of the capital expenditures of the organizing committee)
- Other services (any miscellaneous services purchased as a part of the capital expenditures of the organizing committee)

Appendix C – List of Consulted Documents

East Coast Music Association, Three year International Export Strategy 2005-2008, IBDA proposal, November 2005.

East Coast Music Association, International Export Strategy, IBDA Final Report - Year 1 (2005 – 2006), May 2006.

East Coast Music Association, International Export Strategy, IBDA Final Report - Year 2 (2006 – 2007), May 2007.

MacInnes Associates, Outcome Assessment, East Coast Music Awards and Conference International Program, 2003 & 2004, April 2005.

Consortia Development Group, Pan-Atlantic Cultural Export Initiatives Evaluation, April 2004.

Appendix D – List of Key Informants

<p>Case Study 1 – Nova Scotia</p> <p>The Barra MacNeils</p>	<p>André Bourgeois – Manager Tim Drake – The Roots Agency (USA) Steve Butler – Paquin Entertainment – Booking Agent (Canada)</p>
<p>Case Study 2 – New Brunswick</p> <p>Matt Andersen</p>	<p>Jeff Liberty – Manager Bob Paterson – Booking Agent (UK) Steve Butler – Paquin Entertainment – Booking Agent (Canada)</p>
<p>Case Study 3 – Newfoundland and Labrador</p> <p>Duane Andrews</p>	<p>Duane Andrews Lynn Horne – Publicist Phill McIntyre – Presenter (USA)</p>
<p>Case Study 4 – Prince Edward Island</p> <p>Catherine MacLellan</p>	<p>Lloyd Doyle – Manager Andy Cooper – Tomtom Music (UK)</p>

Appendix E – Case Studies

Case Study: Catherine MacLellan

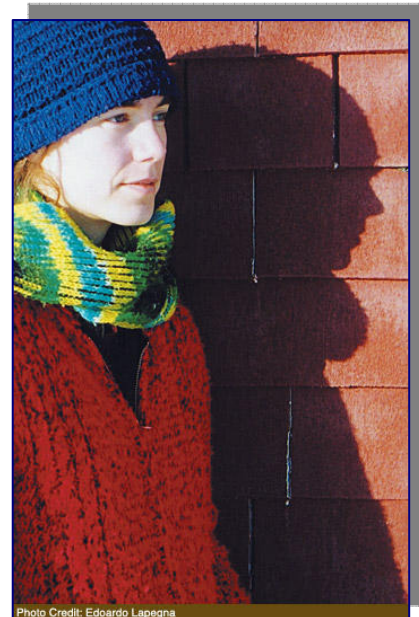
1.0 Artist Profile

Catherine MacLellan is a PEI-raised, Halifax-based songstress who cites Joni Mitchell, Nanci Griffith, Townes Van Zandt, and peer Julie Doiron, as her main influences. Her compelling voice and her sensitive yet powerful songs have attracted the attention of an increasing number of music lovers and industry executives alike.

After completing high school in Prince Edward Island (PEI) and a year traveling in Australia, Catherine moved to Toronto where she began playing open mic nights in folk clubs. Upon returning to her native PEI she took up part time jobs and began to perfect her skill as a performer by playing with The New Drifts and then old-time country group Saddle River. It is during this period – the early 2000 – that she met James Philips and Lloyd Doyle, two people who would play a major role in her creative and business development.

In 2004, Catherine MacLellan recorded her first solo album, *Dark Dream Midnight*, for which she received two PEI Music Award nominations and a positive response in Quebec and Ontario. It was followed by the 2006 *Church Bell Blues* whose “intense narratives invite self-examination and invoke universal experiences” according to The Star critic Greg Quill. She received four PEI Music Award nominations for her second effort. As well, if her multiple East Coast Music Awards nominations in 2006 and 2007 for those same albums are any indication, her music has also been warmly embraced by audiences throughout the Atlantic region. The release of her third solo album is imminent.

Catherine MacLellan is managed by Lloyd Doyle of Sandbar Music (PEI). In the past few years, she signed with True North Records, (www.truenorthrecords.com), Canada’s oldest independent record label and one of its largest. She also has an agreement with Tomtom Music, an international booking agency based in Derby, United Kingdom. In Europe, her albums are distributed by London-based Proper Music



Distribution. She has also uses contract publicists, namely Geraint Jones, who assisted with a recent European tour.

2.0 Exporting History

Catherine MacLellan first started thinking about the possibility of exporting in 2005, soon after the release of her first album *Dark Dream Midnight*. Although the album came out too late to be eligible for a 2005 ECMA nomination, she and manager Lloyd Doyle attended the event that year and aggressively pursued every opportunity. As a result, in 2005, she was invited to take the stage at the PEI Music Awards. She was also invited to participate in a North American Folk Alliance (NAFA) activity in Montreal. Her performance in Montreal caught the attention of the rest of the ECMA delegation.

Catherine received more exposure at the 2006 ECMAs. There, she participated in a songwriter café showcase, a root showcase and CBC's Main Street show. According to Doyle, by that time, she had her own business plan and delegates were becoming more aware of her.

Her participation at the 2006 ECMA's laid the groundwork for the next leap forward. Later that year, her second album *Church Bell Blues* was released in Canada and she was encouraged by ECMA officials to participate in an Export Readiness Training Workshop in Charlottetown. One of the resource persons at the session was Graham Stairs of True North Records. Although not necessarily looking for a label at the time, Catherine eventually decided to sign with the company. *Church Bell Blues* was re-released internationally (Canada, US, Europe) by True North records in 2007.

Later, at the 2008 ECMAs in Fredericton, Lloyd Doyle met one-on-one with Simon Holland, a representative of Proper Music Distribution, the largest independent record distribution company in the UK. It is important to note that Simon Holland had heard Catherine's CD through his contacts at True North Records. Doyle invited Holland to attend Catherine MacLellan's showcase later that day. Not only did he attend, he brought Andy Cooper with him. As mentioned previously, Cooper is a UK-based booking agent (Tomtom Music). After the set, Catherine was informally invited to tour the UK. In the months that followed, plans emerged for her to take part in a 10-date New Pioneers Trio tour alongside fellow Maritimers Old Man Luedecke and Ryan LeBlanc as well as a 7-date tour of the UK and Sweden with American folk singer Steve Forbert.

The tour was supported by the Foundation to Assist Canadian Talent on Recordings (FACTOR), the Starmaker Fund and Music Nova Scotia.

Catherine MacLellan thus completed her first international tour in December 2008. She is now looking at new opportunities in Germany and France and also hopes to develop the Western Canadian market.

According to Lloyd Doyle, even though she hasn't toured Germany, that country has become Catherine's biggest market in terms of CD sales. He attributes this to the work of Proper Music Distribution and Alive Music in Germany.

3.0 Export Success Story

A key player in Catherine's export track record so far is Andy Cooper of Tomtom Music.

Andy Cooper started in the music industry as founder and director of "Off the Tracks Festivals" in 1985. In 2003, he joined Adastra Music as a free lance booking agent and worked with such artists as Martin Simpson, La Bottine Souriante, Le Vent Du Nord, Juan Martin, and Danu. A few years later, he founded Tomtom and developed his own roster of artists, including Steve Forbert and Colin Hay (formerly of Men at Work). Tomtom Music is also the agent of East Coast artists Tom Fun Orchestra, Ryan LeBlanc and Old Man Luedecke, three acts also identified through the ECMAs.

Andy first became interested in the possibility of buying Canadian East coast musical products in 2007 when he participated in his first ECMAs. At the time, he did not know what to expect and came with two UK-based promoters, one of which was a representative of the Guilfest Festival in London. Cooper soon realized that three different types of expertise were required for East Coast artist to maximize their potential on UK soil: a booking agency, a publicist and a record distribution company.

As a result, at the 2008, Andy Cooper teamed up with Will McCarthy (a UK-based publicist) and Simon Holland of Proper Music Distribution. The team members saw many showcases together and quickly agreed that they would focus their joint efforts on Catherine MacLellan. They all thought her voice would cross over well in the UK. A deal was struck quickly. Within months, Catherine MacLellan was sharing stages with Steve Forbert in the UK and Sweden in front of audiences ranging from 300 to 400.

According to Andy Cooper, public exposure maximizes the potential for indirect benefits. In his own words: "you never know who's in the room." From this point of view, MacLellan's first European tour was a success. By opening for Forbert, she played for much larger audiences than if she had toured alone. In addition, according to Cooper, MacLellan received exceptional media coverage during the tour and preliminary plans for more touring are in the works.

4.0 Lessons learned

According to those interviewed, Catherine MacLellan's recent export success is due to a fortunate combination of circumstances.

Firstly, all agree that the ECMA's has played a critical role in helping to build Catherine MacLellan's profile and in creating business opportunities for her.

Secondly, for Catherine MacLellan, touring Europe would have been considerably more difficult, if not impossible, without the support of FACTOR, the Radio Starmaker Fund and Music Nova Scotia. In fact, Andy Cooper says access to these funds is part of what makes East Coast artists particularly attractive. He believes these funding sources are essential for raising the profile of emerging artists and creating opportunity.

Thirdly, a compelling argument can be made that international delegates attending the ECMAs as part of an "agent-publicist-distribution" team stand a better chance of creating meaningful opportunities for themselves and East Coast artists.

Finally, it was suggested that the ECMAs may want to fund showcase stages at various existing UK festivals as a way to promote East Coast artists. This model is currently being used by the Arts Council England and the Scottish Arts Council whereby they are funding showcase stages at various already established festivals through out the year.

Case Study: The Barra MacNeils

1.0 Artist Profile

The Barra MacNeils is a family group based in Sydney Mines, Nova Scotia. Formed in the 1980s, the group is deeply rooted in the Cape Breton-style of Celtic music and tradition. The group has become widely known in Canada and abroad for its unique brand of musicianship and artistic ability. Hailed as Canada's Celtic ambassador, the group is known for its multiple lead vocalists, rich vocal harmonies and superior multi-instrumentalists. Live performances also include dancing and storytelling.

As a group, The Barra MacNeils has released a dozen recordings, including their *20th Anniversary Collection Album* (2007), *All At Once* (2005), *Racket In the Attic* (2002), *The Christmas Album* (1999), *Until Now* (1997), *The Question* (1995), *The Traditional Album* (1994), *Closer to Paradise* (1993 – Certified Gold in Canada), *Timeframe* (1990), *Rock in The Stream* (1989) and *The Barra MacNeils* (1986). In 2001, the group also released a DVD titled *Cape Breton Christmas*, incorporating music from their live Christmas Concert TV Special. The Barra MacNeils has also won multiple awards.



The group is managed by Instinct Artist Management (Andre Bourgeois) and has agent representation in Central Canada, through Paquin Entertainment (Toronto) and in the United States with The Roots Agency (Westwood, NJ and Ann Arbor, Michigan.) The Barra MacNeils has its own label, but the master recordings are leased to Fontana North (Maple Music Group of companies), which has affiliations with Universal.

2.0 Exporting History

The Barra MacNeils' export story spans over a 25-year period. The group started modestly in the 1980s, performing at local venues in Cape Breton. They soon attracted the attention of outsiders and were invited to record radio shows and tour other provinces. Most members were still in high school at the time, so touring was limited to the summer season.

In the late 1980s, the group released its first two albums independently. However, it was not until the independent release of their third album, *Timeframe*, in 1992, that The Barra MacNeils received significant national attention and recognition. Not only was *Timeframe* awarded Album of the

Year at the 1992 East Coast Music Awards, but the group was also named Band of the Year. This exposure caught Polydor/Polygram Canada's attention, which signed the group and re-released its first three albums.

According to current band manager André Bourgeois, at least two other converging factors contributed to the emergence of The Barra MacNeils as an export act. First of all, around 1992, Celtic music was becoming increasingly popular in a number of international markets; and secondly the ECMAs were expanding and inviting an increasing number of international delegates and buyers to the annual conference. Like many artists at the time (such as The Rankins and Rita MacNeil), The Barra MacNeils were attempting to make inroads in the UK and the United States. The group achieved some degree of success by performing at festivals in Europe and America, but according to Bourgeois did not have a clear plan or strategy to break into those markets.

Meanwhile, the band was continuing to enjoy domestic success for both their recordings and live performances. In the mid-nineties, The Barra MacNeils opened for Celine Dion throughout Canada, and the video of the single *Darling Be Home Soon* was put on high rotation on MuchMusic. Although the group was also gaining some attention on the European market—where they had played at several festivals—it was their next CD, *The Traditional Album*, which earned them their first European release through the independent Iona label. Iona also issued a compilation CD, featuring songs from their first three albums.

Today, the group tours Canada once a year from Victoria to Sydney. According to Steve Butler, the group's Canadian agent at Paquin Entertainment, these tours are 80% sold out. In recent years, the group has also toured the United States (28 dates in 2008), the Caribbean and the UK. By headlining major festivals and concerts, through special guest appearances (such as Rita MacNeil's CTV Christmas Special, performing with The Chieftains), various other television specials, film and television placements (the film soundtrack of *Men with Brooms* and their album *Racket In The Attic*) as well as an annual Christmas tour, The Barra MacNeils successful course has been set from a solid foundation. The group's one-hour *Christmas Television Special* (2000) continues to be broadcast on Country Music Television (CMT) in Canada and on the Public Broadcasting Service (PBS) network in the United States.

3.0 Export Success Story

Since 2001, the Barra MacNeils has been represented in the United States by Tim Drake, president of The Roots Agency, a booking agency based in Westwood, NJ, with satellite offices in Michigan, Tennessee and Florida.

The agency has no other East Coast artists on its roster, but does represent more than forty notable acts, including Arlo Guthrie, Richie Havens, Charlene Carter and the Saw Doctors. Although he never attended the ECMAs, Tim Drake first became aware of The Barra MacNeils in the early 2000s through the group's former manager, and a number of presenters who had seen the group perform during the Awards show. According to Drake, the Cape Breton group was also gaining artistic acknowledgement in the US, namely from a performance at the Milwaukee Irish Festival.

Eventually, Drake invited The Barra MacNeils to open for the Saw Doctors as part of a tour of the North Eastern states. After seeing a live performance, he invited the group to be part of his roster. Drake credits the ECMAs for having helped the spread the word about the act. He says their business relationship progressed slowly at first. The challenge was to expose the group to the American public by booking at festivals. Initially the endeavour wasn't very profitable for neither of them, but Drake's love for the group and the belief that their talent would prevail, made him keep at it. He says, "I had more patience with this band than anybody on my roster."

According to Drake and manager André Bourgeois, much of the Barra MacNeils' success in the US market in the past few years is attributable at least partly to the US Festival Directors' Conference organized by the ECMAs at Celtic Colours International Festival, a yearly event held on Cape Breton Island. Drake says US festival bookings became much easier after that, "We never used to get calls for the Barra MacNeils. We would always have to stick it down someone's throat," he admits, adding "We're now talking in terms of 20 and 30 dates per year in the US. And we keep getting calls and interest." Some of these booking dates included such prominent festivals as the Colorado Irish Festival, the Cleveland Irish Cultural Festival and the Milwaukee Irish Festival.

Still, there are barriers to touring the US. The cost of moving a large group of people out of Cape Breton is sometimes prohibitive. A few years back, Bourgeois recalls, they had a \$10,000 offer from a US festival, but had to turn it down because it didn't cover costs. In many cases, he says, some form of government grant is necessary to make the international tours viable.

5.0 Lessons learned

This case study illustrates how critically important visibility is to any aspiring East Coast artist. Tim Drake encapsulates it when he says the following: "The thing is, in this business, you have to be seen. The more you are seen, the more word of mouth gets around and the more you create your own luck. It's not an exact science, however. You can do all the right things and it leads nowhere. But you never know who's in the audience. It can get

you to other festivals, or on TV, or get you a record deal. But if you're not out there, you're certain it's not going to happen.”

Another lesson learned is that subsidies— even for established acts like The Barra MacNeils— can make a difference. Evidence shows that access to funds from FACTOR, the Radio Starmaker Fund and provincial programs such as Music Nova Scotia's Export Development Program has helped this group's international career.

Finally, those interviewed for this case study claim to have benefited from the ECMAs work and have high praise for the fact that the organization places so much emphasis on exporting. Very few arts organizations, they say, put as much value on exports.

Case Study: Matt Andersen

1.0 Artist Profile

Matt Andersen is a blues guitarist and singer-songwriter. Since 2002, he has emerged as one of Atlantic Canada's most promising recording artists. A native New Brunswicker, Matt Andersen now makes Halifax his home. His expansive style mixes blues, roots and rock. This, combined with a warm and soulful voice and distinctive performance skills, has earned him a devoted and ever-increasing following.

Matt's musical career started with the New Brunswick band, Flattop. As their front man, he captured audience attention by hammering out classic covers and famous blues numbers on his battered acoustic guitar.

Matt Andersen's discography includes an introductory EP, two critically-acclaimed live fans' favorites and two full-length releases: *Second Time Around* and *Something in Between*; both promoted through Busted Flat Records.

He has taken the stage as a headliner at major festivals, clubs and theatres throughout North America and the UK. In addition, he has shared the stage and toured with Randy Bachman, the late Bo Diddley, Little Feat, April Wine, America and Lover Boy.

Matt Andersen is managed by Jeff Liberty Management. Other business associates include the Canadian promoter and publicist, Anya Wilson; the independent record label, Busted Flat Records; and two booking agents, Paquin Entertainment (US and Canada) and The Bob Paterson Group (Europe).



2.0 Exporting History

Matt Andersen's first exposure to international markets came at the ECMAs in 2004. His manager, Jeff Liberty, credits Music New Brunswick for helping Matt showcase at the event. At the time, his client did not have international aspirations per se, but was pleasantly surprised by the attention he got at the event. At about the same time, Matt signed with Paquin Entertainment. As part of his management

team, this Canadian booking agent, has played – and continues to play – a key role in helping the artist develop the domestic market. Paquin is also the agent for a number of East Coast artists, namely Ashley MacIsaac, Jimmy Rankin and the Barra MacNeils.

Steve Butler is the agent assigned to Matt Andersen at Paquin. According to Butler, Andersen is still considered a newcomer on the Canadian music scene, but his domestic fan base is growing and his Canadian tours have been financially viable. Domestically, Matt Andersen's team has been focusing on two main markets: festivals and performing arts centres. These are considered 'soft ticket' markets because they usually cater to individuals who are fans of the venue, rather than the artist. The next step in Andersen's domestic career is to enter what Butler calls the 'hard ticket' market, and as he puts it: "These are the people who are willing to take \$20 out of their pocket to go see the artist." Admittedly, this market is harder to penetrate, but it is a good indicator of the artist's committed fan base.

Matt Andersen's first international gig was a tour of performing art centers in California, which eventually led to his opening for the band America. As a result, different pockets of interest started to grow, particularly in places like Texas. Eventually, Andersen was invited to showcase at the Folk Alliance, one of largest music conferences in North America. In regards to Matt Anderson's European exposure and his partnership with the Bob Paterson Agency and others, he has completed four tours of the UK and his notoriety there has been growing steadily. He has opened for several acts; including the Mississippi Delta Blues icon 'HoneyBoy' Edwards. Andersen's manager, Jeff Liberty, is now working on the Australian and French markets. At the 2008 ECMAs, he met agents and label representatives from both countries. According to Liberty, the ECMA's International Program is critical to the success of pairing Atlantic-based artists and companies in global markets. He says it allows the parties to network and build relationships that would otherwise not be possible.

3.0 Export Success Story

Meeting UK-based agent, Bob Paterson was a game-changing moment in Andersen's export story.

Paterson founded The Bob Paterson Agency in 2005 after having been involved in the roots music field as an agent, promoter, radio presenter and DJ since 1995. His agency now boasts a roster of approximately 30 of the world's most accomplished singer-songwriters and original bands, including acts such as Tom Russell, The Wailin' Jennys, Ian McLagan & the Bump Band, Chip Taylor, Eve Selis, Jason

Ringenberg, Elizabeth Cook, Ezio, Deadstring Brothers, Blue Rodeo, Eileen Rose and The Redlands Palomino Company.

When he first saw Matt Andersen live at the 2006 ECMAs, Paterson was immediately struck by his stage presence, his abilities on guitar and his singing. According to Paterson, “You don't always get this combination; and to cap it all off, his songs are strong too.” During the event, Paterson had a one-on-one meeting with Matt Anderson’s manager Jeff Liberty, and soon after became Andersen’s agent for the UK. According to Liberty, it took approximately six months to negotiate a business arrangement with The Bob Paterson Agency—and both acknowledge the ECMA’s central role in bringing them together. Once they had a deal, the partners immediately began mobilizing their resources in an effort to introduce Andersen to European audiences. At the beginning, they explored various options to cost share touring with other East Coast artists. The goal was to provide Andersen with the opportunity to play and sing. They felt he would then take it from there.

But Andersen was facing significant barriers. First, he was totally unknown in the UK, and venues and promoters needed to be persuaded. Second, Andersen didn’t have a label to support him. Faced with such barriers, Patterson and Liberty knew they had to pull together a European-based team.

With Paterson’s assistance, Liberty was able to negotiate a distribution deal with UK-based Weatherbox Ltd. for Anderson’s CD *Something In Between*. He was also able to secure a publicist to solidify radio play in the UK. It is noteworthy that Andersen was eventually featured on the front page of the London Times and played live on BBC Television. Anderson’s manager explains that, as his client’s profile is enhanced, more opportunities occur. “It’s like a domino effect. Every time we go back to the UK, we get to meet new people and we get invited to more festivals and are put on bigger bills. Every time Matt plays, he opens up new opportunities.” In regards to his growing career in Europe, Anderson’s UK agent Bob Paterson says this will also provide indirect benefits domestically. “It will make him more appealing as an artist in his home country—or even in America.”

4.0 Lessons learned

The evidence gathered for this case study clearly indicates that the ECMAs were instrumental in the development of Matt Andersen’s young, but promising international career. Without the ECMAs, it is highly unlikely that the paths of Matt Andersen and Bob Paterson would have crossed.

All interviewees speak very highly of the ECMA's role in fostering business relationships and export opportunities. According to Jeff Liberty, "I don't know that the ECMA's can do much more. They literally dragged me to Bob Paterson. You can't ask for much more than that." Liberty is also satisfied with the ECMA's Export Readiness Training workshops: "They are like prep. You go in prepared and don't feel like you're going into the wolves."

Nevertheless, ECMA organizers need to keep working on post event follow-up between artists and their international contacts. According to the interviewees, it is easy to lose touch after the initial meeting. It would therefore be beneficial for the ECMA's to continue to focus on building the delegates' relationships throughout the year.

Case Study: Duane Andrews

1.0 Artist Profile

Duane Andrews is a gifted guitarist who combines jazz, gypsy and traditional Newfoundland folk music to render a style that defies classification or labeling. Greatly inspired by legendary guitarist Django Reinhardt, he also mixes in French, Irish, Portuguese and English influences.

Duane Andrews is a professionally trained musician. He is a graduate of the Jazz Studies Program at St. Francis Xavier University. He has also spent several years studying music composition in France, initially at the *Conservatoire International de Paris* and eventually with Georges Boeug and Regis Campo at the *Conservatoire National de Région* in Marseille.

Upon his return to his home province of Newfoundland and Labrador, he began developing his unique musical vision. In 2004, he released his self-titled debut CD, *Duane Andrews*, followed in 2006 by multiple award winner, *Crocus*. This was followed by his 2008 release *Raindrops*, which he recorded with the Atlantic String Quartet.



Duane Andrews is self-managed, but works with a number of partners and associates—mainly Toronto-based booking agent Marilyn Gilbert (www.mgam.com), domestic publicist Lynn Horne and marketing consultants Mickey Quase and Neil Beckwith. Over the years, he has also hired the Planetary Group (www.planetarygroup.com) as his US-based publicists.

2.0 Exporting History

Duane Andrews' export history began soon after the release of his self-titled first CD in 2005. At the time, the artist was not known outside his home province, but was actively seeking to expand his markets. Through Denis Parker, Executive Director of Music NL, Andrews met marketing consultant Mickey Quase. Parker and Quase then introduced him to people in the Atlantic Canadian music scene, like Lynn Horne who became his publicist.

In 2005, Duane Andrews took part in his first ECMA's in Sydney, Nova Scotia. That year, he also participated in his first "Export Development Training Workshop" during the Atlantic Film Festival in Halifax.

Andrews credits Music NL for helping him make the right contacts at the ECMA's and the Atlantic Film Festival.

In 2006, Andrews showcased at the ECMA event in Charlottetown. In the audience was Nalini Jones, a representative of the Newport Folk Festival—a world-renowned American folk-oriented music festival in Newport, Rhode Island. During the same ECMA conference, Andrews and Jones had a one-on-one meeting. Although she expressed interest in his act, it wasn't clear at first that something would come out of the meeting. According to Andrews, “After our meeting, it didn't feel like anything was happening.”

In February of the following year, Bob Jones, CEO of the Newport Folk Festival, was scheduled to meet Andrews at the ECMA's. In the end, he could not attend but still asked to meet the artist over the phone. During their conversation, Jones asked Andrews for a press kit. Shortly after, Jones formally invited him to perform at the prestigious festival.

The deal was surely facilitated by the fact that ECMA, that year, had partnered with Newport to feature East Coast artists on a “*CANADIAN MUSIC. EAST COAST STYLE*” stage. Andrews learned about this as he was negotiating his contract with the Newport Folk Festival and says it gave him a sense of support and confidence.

In planning his trip to Newport, Andrews hired The Planetary Group, a US-based artist development firm that specializes in publicity and radio promotion. Planetary was able raise Andrews' profile by tailoring a campaign to get his recorded music to play on specialty radio program in the US.

Over the past two years, Duane Andrews has been increasingly busy in the Canadian domestic markets. The following table provides an overview of bookings during this period:

Year	Domestic within Atlantic Canada	Domestic outside Atlantic Canada	International
2007	7	4	22
2008	19	8	1

The year 2007 was undoubtedly his busiest internationally. Through contacts made at Contact East, he was invited to take part in the *Ten Days on the Island* Festival in Tasmania, Australia, where he played several dates. He also toured several US States and played in Iceland. The highlight of 2008 was a tour of several Canadian Jazz festivals, including the ones in Ottawa, Calgary, Vancouver and Victoria.

It is also noteworthy that Andrews attended a number of North American Folk Alliance (NAFA) events: 2003 in San Diego, 2005 in Montréal, 2006 in Austin and 2007 & 2008 in Memphis.

To be sure, there are still barriers to Duane Andrews' international career. He cites costly travel outside his home province of Newfoundland and Labrador, as an example. To help cover some of those costs, he has called upon several subsidy programs, including FACTOR and Music NL. According to his domestic publicist Lynn Horne, these programs have played a critical role in Andrews' export success stories.

3.0 Export Success Story

As a direct result of contacts made through the ECMA's, Duane Andrews has performed at the Skye Theatre, a performing arts centre located in South Cartage, Maine (www.necelticarts.com). Other East Coast artists who have performed at Skye Theatre recently include Samantha Robichaud, Wendy MacIsaac, Mary Jane Lamond and Pogey.

The Skye Theatre was founded as a non-profit organization by Phill McIntyre in the early 2000s. McIntyre was inspired to start the theatre after attending Celtic Colours— a yearly Celtic festival held in Cape Breton. Over the past 5 years, the theatre has grown by leaps and bounds. From a modest beginning of six or seven shows in its first year, the theatre has evolved into a venue that will present more than 100 shows in 2009.

Skye Theatre founder, Phill McIntyre first became aware of Duane Andrews at the 2005 ECMA event in Sydney, Nova Scotia— however, it was only one year later, in Charlottetown, that he saw him perform. McIntyre was attracted not only by Andrews' superior musical ability, but also by what he describes as “The right attitude and work ethic.”

Back home after the conference, McIntyre started to informally promote Andrews to peers and contacts, one of which was the Newport Festival. When Andrews was eventually invited to perform at Newport, McIntyre used the opportunity to book him at the Skye Theatre. He was also able to provide the artist with additional exposure, including an appearance on an NBC affiliate show in Portland.

6.0 Lessons learned

Based on the information gathered for this case study, it is clear that the ECMA's have been an important catalyst in Duane Andrews' international career thus far. All of the interviewees, including Duane Andrews himself, praise the work of the ECMA's and its Export

Development Strategy. In particular, this case study illustrates the power and effectiveness of one-on-one meetings, even though they sometimes take time to bear fruit.

But the ECMA annual event, in and of itself, surely isn't enough to guarantee success. Breakthroughs come to those who are able to maximize the opportunities provided by the venue. In the case of Duane Andrews, success is probably attributable as much to his business acumen as his musical prowess. Clearly, he has made all the right moves at critical times. Despite the team of qualified professionals that surround him, one is left with the distinct impression that one of the artist's greatest assets is his natural ability to sell himself.

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