



# A CONTINENT OF OPPORTUNITIES

Canadian Independent Music in the Latin American Market



PREPARED BY:

SOUND  
DIPLOMACY

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Canada 

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Opportunities For Canadian  
Independent Companies In Latin And South America

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## EXECUTIVE SUMMARY

# INTRODUCTION

The Canadian Independent Music Association commissioned Sound Diplomacy to undertake an extensive analysis on the Latin and South American markets. This report provides the practical information that CIMA and the Canadian independent music industry need to know before investing in the region. The outcome of this study is a detail market guide to the Central and South American markets for Canadian independent music companies. The report focuses on the most profitable and structured market opportunities across Latin and South America for Canadian independent artists.

Sound Diplomacy, in partnership with in-market professionals, has developed 10 country guides that extensively details their respective music markets. The 10 focus countries are: Argentina, Brazil, Costa Rica, Chile, Colombia, Cuba, Mexico, Panama, Peru and Puerto Rico. In addition, Sound Diplomacy developed 12 one-page fact guides on the following countries: Belize, Bolivia, Ecuador,

Guatemala, Guyana, Nicaragua, Honduras, Paraguay, Suriname, el Salvador, Uruguay and Venezuela.

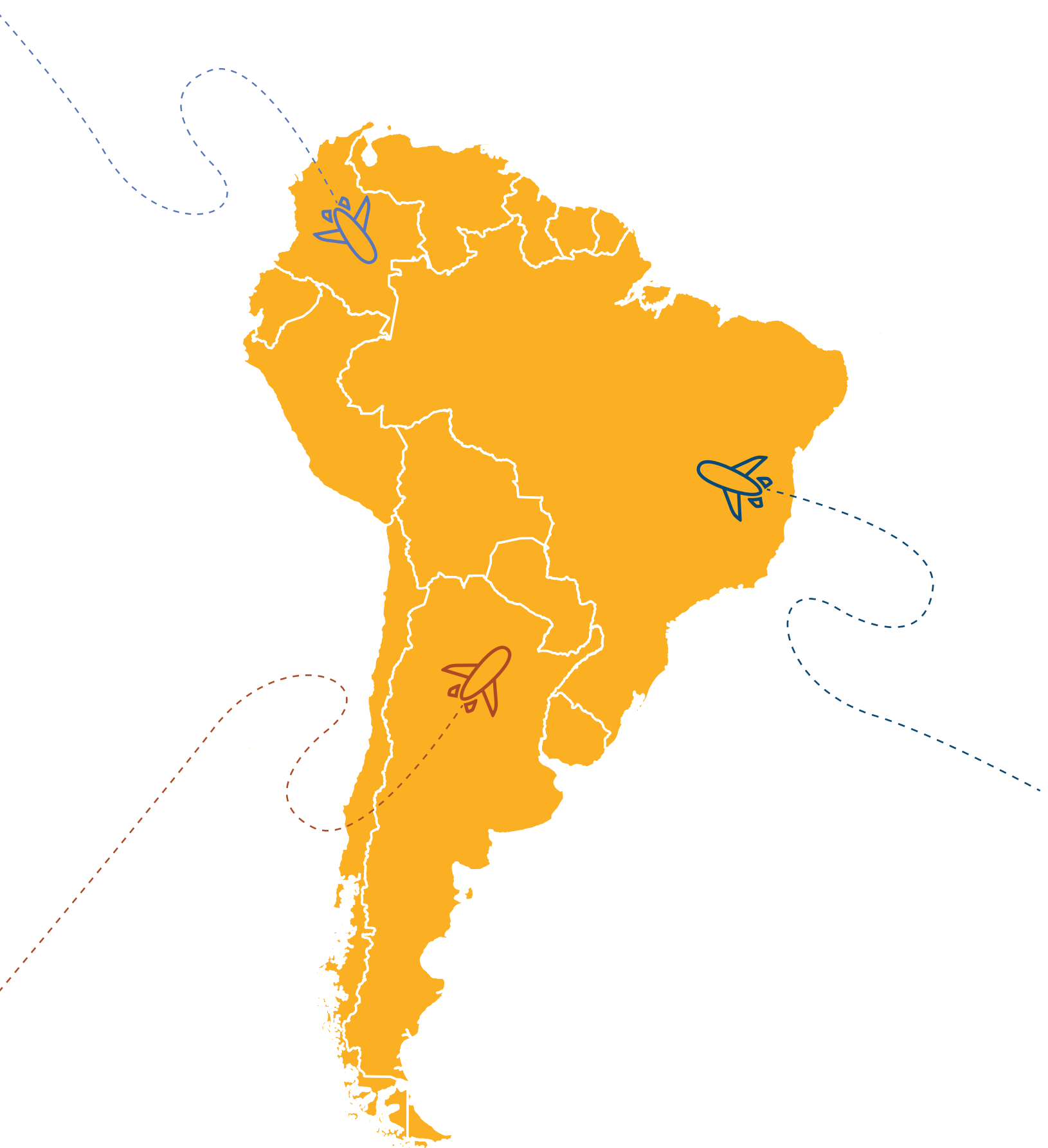
The study found that Latin America as a whole, for the fifth consecutive year, had the highest level of growth in recorded music revenues (+11.8 per cent). Digital revenues rose 44.5 per cent, more than four times the global average. Streaming revenue increased by 80.4 per cent. Some markets are well-developed and have similar industry standards as those of Canada in terms of data collection, sales turnover, digitalisation and so on. Others are still in development, but they present opportunities for growth and investment. For instance, some of the markets analysed appear to have few music industry professionals, while in others there is no international industry gathering in place and so forth.

## KEY TO THE COUNTRY AND ONE-PAGE GUIDES

The 10 country guides are organised into sections, starting with an overview detailing the size of the country's market and how to navigate it and followed by sections breaking down each aspect of the market itself: recorded market, live market, publishing market and secondary market. Media and PR, and practical tips such as visa requirements and tax policies, complete the guides.

The one-page fact guides have been compiled into three sections. Following a brief overview, the 'Music Ecosystem' section outlines the market's standout features. These differ from country to country but

generally include available streaming services; the country's habits in relation to music consumption; key players in the domestic market, such as government bodies, trade shows, festivals and industry associations; recorded, live, publishing and secondary markets and other miscellaneous information such as rates of internet access and investment. The third section is dedicated to compiling useful contacts pertaining to the country's music market.



# SUMMARY OF KEY FINDINGS

Global Music Report 2016

## A. Relevance to Canadian independent artists and companies

As previously noted, all Latin and South American markets vary considerably and as such offer a very different set of opportunities and challenges. These range from a strong network of industry conferences facilitating entry into a certain market to a deteriorating transport network impeding touring. It is also worth noting that not all developed domestic markets are relevant to Canadian independent artists and companies, as a large part of the Latin and South American market is dedicated to domestic and Spanish speaking music.

## B. Opportunities in the recorded music market

A country's recorded music market encompasses information on sales, retail, mobile, streaming, physical and digital distribution, industry players, trends and strategies. It is worth stressing how quickly recorded music revenues are growing in Latin and South America. Mexico, Colombia and Brazil in particular have seen big year-on-year increases in subscription rates to streaming platforms, with vinyl resurgences also being witnessed across the continent but most notably in Chile, Argentina and Puerto Rico.

This section also highlights the popularity of different genres in each domestic market, with consumers in Colombia, Paraguay and Guatemala being open to the widest range of styles. It also notes contact details and information on record stores. In Panama and Costa Rica, these shops tend to be independent, offering digital retail as well, whilst in Chile they also act as distributors for independent labels. Argentina has many government led initiatives in aid of record stores such as Noche de las Disquerías and Fieras de Discos.

Other common trends found across the continent, specifically in Brazil, Argentina, Guatemala and Belize, are domestic labels offering an all-encompassing service including management, distribution and PR. National mobile providers partnering with streaming platforms to provide customers with access to music, at no extra cost,

is another important trend. At the time of writing, mobile providers in Colombia, Brazil, Peru and Puerto Rico were offering this service.

In terms of streaming services, the most widespread platforms are Spotify, Deezer (currently the most popular in Colombia), Google Play, iTunes, and others that are specific to Latin and South American and domestic markets, such as Claro Musica or Ichamo (a Venezuelan service).

The guides also list particular contacts or public and private bodies that have pre-existing relationships in Canada, such as Brazil or Guyana, and also go into detail regarding initiatives concerning cultural and artistic exchanges between countries. Whilst these opportunities are widespread across the continent, they seem particularly attainable in Chile, Argentina and Cuba.

Overall, there are limited opportunities in the recorded market for Canadian acts in Panama, Venezuela, Cuba, Nicaragua and Bolivia. Reasons for this vary from country to country and are explored in more detail in each individual country guide. It is mainly due to the lack of record labels interested in working with English speaking or foreign bands, or the absence of a developed music industry able to support an international market. Despite the resurgence in the popularity of vinyl, physical sales are dropping around the continent and especially in Colombia, Chile and Argentina.

It's also worth noting that Latin and South American countries have an endemic issue with digital and physical piracy, with Mexico (in which a quarter of listeners still consume music illegally), Uruguay, Venezuela and Guyana among those most badly afflicted.

## C. Opportunities in the live music market

The live music market section is made up of information on relevant promoters, booking agents, festivals, showcase opportunities, touring structures and pertinent fees and logistics. It also lists the best cities in each country in which to tour, which genres are most



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## SUMMARY OF KEY FINDINGS

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popular and any extra opportunities the summer months may offer.

Mexico, Chile, Panama, Ecuador, El Salvador, Uruguay, Venezuela, Belize, Guatemala and Paraguay are all countries with an established festival scene booking foreign acts regularly, or are in the process of developing a live industry offering opportunities to English speaking artists and bands. On top of this, Colombia, El Salvador and Uruguay have busy summer festival periods.

In some Latin and South American countries, such as Mexico, Colombia or Chile, domestic independent companies run most of the festivals, a trend that is also growing in Panama, Honduras and Uruguay. International corporations still offer opportunities to bands through their promotion and sponsoring strategies, with Mexico and Puerto Rico being good examples of countries in which this happens.

Although still relatively big markets, the number of concerts in Chile and Argentina are declining, and some other countries offer limited opportunities for Canadian bands in the live market altogether due a wide range of factors. These reasons include complicated bureaucratic barriers (Cuba), a lack of small venues and live industry infrastructure (Peru and Guyana), stringent licensing laws that hamper the growth of a grassroots music scene (Puerto Rico), a preference for Spanish speaking acts (Costa Rica) and no commercial music festivals being in place (Bolivia). Funding could be an obstacle as well, with neither Cuban nor Brazilian entities willing to engage in it.

### **D. Opportunities in the publishing market**

In this section, information can be found on each country's collection societies (e.g. if they are SADAIC recognised like Argentina or SOCAN recognised like Chile, Mexico and El Salvador). This section also touches upon domestic industry standards and publishing and synchronisation opportunities for English catalogues.

Most Latin and South American countries are still developing these markets and can be considered

especially underdeveloped in Mexico, Costa Rica, Paraguay and the smaller countries around the equator. In some countries, the synchronisation sector offers more opportunities than publishing (such as Chile), or vice versa (Colombia). In both Mexico and Colombia, there is a distinct focus on domestic music, therefore very few options for Canadian acts.

On the other hand, Argentina has a highly developed sync sector with plenty of potential, and in Brazil there is an array of opportunities for Canadian artists to explore in music publishing, all done through blanket agreements. Despite being highly bureaucratic, Cuba is also an interesting market in this regard.

This section also highlights idiosyncrasies within the market specific to individual countries. In Colombia for example, despite royalties from live music steadily increasing, music and lyrics have to be registered separately, whilst in Guyana, there is a complete lack of copyright registration. Mexico ranks third in global Youtube consumption.

### **E. Opportunities in the secondary market**

These include prospects in the video game industry, artist and band merchandise, brand engagement, publishing for recorded music and film & radio. Whilst music piracy, both digital and physical, is an issue afflicting most Latin and South American music markets (already discussed above in relation to the recorded market), it seems that Mexico, Colombia, Guyana and Brazil (especially for merchandise) are the countries that have been hit the worst.

Despite this, Brazil still has a very strong market for official band merchandise, as do Chile and Argentina. Peru is developing in this regard as well, but growth is hindered by a commonplace mistrust of online payment systems.

Research also suggests there is a growing video game industry developing in Mexico and Peru, and a booming one in Chile, offering great sync opportunities

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## SUMMARY OF KEY FINDINGS

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to Canadian bands. There is good potential for brand partnerships in most countries; however, Mexico, Cuba and Peru are currently showing limited growth in this sector.

The country reports also go into detail on each market's idiosyncrasies, such as retail being in decline in Mexico, the synch sector not being developed at all in Peru and the potential for vinyl growth in Brazil and Peru.

Information pertaining to opportunities in secondary markets in the smaller states of the Caribbean and Central American territories was difficult to confirm, suggesting that these markets are either very small or non-existent. These countries include Belize, Bolivia, Costa Rica, Honduras, Guyana, Nicaragua, Puerto Rico, Panama and Suriname.

Some alcohol and beverage brands sponsor independent music festivals in Costa Rica, Puerto Rico and Panama, and large corporations such as Heineken, Coors, Miller and Red Bull sponsor competitions, especially in Costa Rica.

### **F. The Media and PR industries**

This section includes a brief summary explaining how the domestic PR market functions, followed by media and PR opportunities for Canadian content and key media and PR contacts. In some countries, like Mexico, Chile, Brazil, Costa Rica and especially Peru, it is very important to work with local agents. Radio still plays a crucial role in Cuba and Chile, and payola is commonplace in Ecuador and Brazil. Working with independent PR agents is advised in Chile and Argentina. Local artist managers act as PR agents both in Colombia and Costa Rica, whilst in Puerto and Panama, there is a distinct lack of PR professionals.

### **G. Practical information**

The report outlines each country's visa system, tax withholding policies and other practical information for Canadian artists and their businesses to consider. Most countries require working visas in order to perform, apart from Cuba. Peru in particular has a costly bureaucratic system around cultural labour for foreigners, and Venezuela's relationship with western countries, particularly the USA, has caused some major touring acts to cancel gigs in Caracas in the last couple of years.



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## Opportunities for Canadian Independent Music Companies in the Argentinian Music Market

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# 1. OVERVIEW

## 1.1 Market Size and Dynamics

Official reports on the state of the Argentinian music industry are outdated because of two main reasons: firstly, SADAIC (Society of Music Authors and Composers of Argentina) and CAPIF (Chamber of Phonograms and Videograms Producers of Argentina), the main collection societies, stopped publishing their collection results in 2014. Secondly, the Buenos Aires Government also stopped releasing its music industry report, issued by the Creative Industries Observatory (OIC), in 2011. This situation makes it difficult to analyse the Argentinian music industry in 2016, an industry also affected by global dynamics and an economic crisis in Argentina.

**“The market presented a very positive growth of 34.8% from 2014, and it is the second largest recorded music market in Latin America after Brazil. The latest figures on the overall value of the music industry in Argentina estimated revenues over US\$ 235.6 million in 2014.”**

Figures provided by the IFPI state that the market had a trade value of US\$ 141.6 million in 2015, of which 58% came from performing rights. This sector overtook the physical (21% share) and digital (20% share) sectors, while sync represented 1% of the total market worth. The market presented a very positive growth of 34.8% from 2014, and it is the second largest recorded music market in Latin America after Brazil. The latest figures on the overall value of the music industry in Argentina estimated revenues over US\$ 235.6 million in 2014.

It is noted that Argentina is a country with an unstable economy. Every 10 years abrupt changes in its economy happen, such as high inflations, devaluations and big political changes that affect economic dynamics and structures. The value of the Argentinian peso increased in 2016, closing at 15.8 (1 USD = 15.8 Argentinian peso).

## 1.2 How to Navigate the Marketplace

Today, the Argentinian market generates its greatest revenue from the live market, which has shown consistent

growth in the last few years. As is the global trend, the mainstream circuit of the live market is managed by multinational companies. A few large entertainment companies have a focus on certain subsectors of this market, such as public and private festivals and venues.

### **Multinational entertainment companies**

These are the companies which oversee the mainstream circuit. Canadian bands have limited opportunity to enter this market, as they coordinate very large events and only invest in bands which have already built a large audience in Argentina. These companies include:

**T4F (Time for Fun)**, one of the biggest promoters in Latin America, with offices in Brazil, Argentina, Chile and Peru. It manages all aspects of live shows from production to artistic design, technical specifications, ticket sales and marketing. T4F promotes large-scale shows and tours from artists such as Madonna, U2, Metallica, Foo Fighters and One Direction, as well as travelling editions of Broadway shows such as Phantom of the Opera.

**Contact:** [comercial@t4f.com.ar](mailto:comercial@t4f.com.ar)

**Fénix Entertainment** is both a concert producer and manager. They own several large-scale venues throughout Latin America, but they are based in Buenos Aires.

**Contact:** [info@fenix.com.ar](mailto:info@fenix.com.ar)

### **National entertainment companies**

These companies will work mainly with indie rock and pop bands, but electronic music (both in its purest forms or mixed with other genres) is also well-received. A good way to penetrate the festival circuit is to build solid relationships with the entertainment companies in order to trade artists. In addition to producing shows, these companies book and promote local bands and are therefore always looking for opportunities in international festivals, such as with a booking exchange.

For smaller independent bands, a good way to enter the Argentinian circuit in rock (indie rock, surf, grunge, stoner, hard rock, electro-rock) is by contacting Sylvie Piccolotto and Pablo Hierro from Scatter Records/Rock City Booking and Press Agency. They develop local bands, promote and produce shows and book artists. This also works as a service exchange, where you promote

artists in Canada and they will do the same in Buenos Aires. They are very well-known by local promoters, companies and festival programmers.

**Contact:** Sylvie Piccolotto [sylvie@scatter.com.ar](mailto:sylvie@scatter.com.ar)

**Contact:** Pablo Hierro [pablo@scatter.com.ar](mailto:pablo@scatter.com.ar)

**Pop Art** is Considered a very important entertainment company that has a lot of influence in audiences. Pop Art produces shows on behalf of government authorities and private brands; owns venues; works closely with Sony; promotes, books and manages artists; and has two labels: Pop Art Discos, for more mainstream bands, and Geiser, for emerging acts. Bands making Indie rock and electropop will be of interest. In addition to organizing Sónar Buenos Aires, where they work mainly with electronic artists, they also license Movistar Fest, a big festival sponsored by the mobile provider company. This year, their international lineup included The Kooks, Mystery Jets, The Magic Numbers, Richard Ashcroft, Smooth Ends, The Strypes, Jamie Cullum, Cypress Hill, Stone Giant and Breakbot.

**DG Entertainment** this is one of the biggest entertainment companies in Buenos Aires, run by Daniel Grinbank, an old name in the local music industry. Its most important festival is Festival BUE. This year, the festival had 15 international artists on its lineup, including Peaches, DJ Koze, Paul Kalkbrenner, Empress Of, John Grant, The Flaming Lips, Wilco and Capital Cities. Latin artists included Bomba Estereo, Mala Rodríguez and Ava Rocka, all of whom incorporate hip-hop, cumbia and local traditional music.

### **DF Entertainment**

Carrying a similar profile to DG Entertainment, DF produces massive shows for the mainstream circuit and organizes festivals like Lollapalooza. International bands will have a chance only if they have built an audience in Argentina, as they only invest in bands that can convene at least 800 people in a festival (and that's a small number in context). The company CEO is Diego Finkelstein, who previously worked in a top level position at Fenix Entertainment.

**Indie Folks (Music Wins Festival)** This Company has gained importance in the past few years. It is run by Alejandro Ban, who also leads Ban Bang, a press and communication agency. Some international bands that have featured in the past few years are Foals, Pond, Ratatat, The Dandy Warhols, Clap Your Hands Say Yeah, Sum 41, Iron & Wine and also electronic artists such as Todd Terje.

Indie Folks has a 360° business model, providing booking, promotion, production of national and international shows and festivals and a strong audiovisual production department where they develop videoclips, live sessions, shorts and films. Bands and artists with a strong visual identity that act as tastemakers, and alternative indie fashion acts will have a better chance of securing a gig.

**Momer 360°** Working with Gentil Irreverencia (Wunderlast Festival), These two independent companies will only produce shows pertaining to 1970s/80s bands, as they work for an older audience. Independent Canadian bands and artists might have a chance if they perform progressive rock in the mould of King Crimson. Mosca Moscheni (Momer 360°) and Horacio Nieto (Gentil Irreverencia) are old industry players. Horacio works frequently with audiences that are interested in yoga, jogging and other "new age" tendencies, and he usually books artists and bands that include Indian and asian root influences or music for meditation.

## 1.3 Trade conferences and industry gatherings

### **BAFIM (Buenos Aires International Music Fair)**

This is a Buenos Aires municipal event, a public music convention coordinated through the General Direction of Creative Industries of the Ministry of Modernization, Innovation and Technology. Established in 2006, it is the first of its kind in the country. It develops showcases, speed-meetings, networking events and different activities and workshops, focusing on the development of music enterprises. The topics being discussed are festivals and live markets, streaming services and social media for artists and companies. Today, it is the main and most important industry gathering in Argentina, in part

because of the political changes of 2016, which affected public policies and events on different scales.

This year, the event is taking place during the first few days of December. It takes place the same week as Fluvial (Chile) and SIM Sao Paulo (Brazil) in order to be more attractive for international promoters. This way, in two weeks, professionals can take part in three major music conferences and get a good understanding of the local scenes. Although it is not 100% confirmed, the idea is to continue developing this market corridor in the South Cone.

This year, there are two Canadian bands performing at BAFIM: Foreign Diplomats (from Indica Records) and Chocolat (from Heavy Trip). Les Deuxluxes from Bonsound will also participate in BAFIM. This was possible because they are travelling alongside a large Canadian delegation from Montreal called SODEC. The program manager is Jean-Philippe Sauvé, and he contacted BAFIM about 10 months before the conference was held. The BAFIM organization was interested in having a Canadian offer for their artistic line-up, because the delegation also included content buyers such as Dan Seligman from Pop Montreal, so the arrangement worked for both sides.

Official website: [www.buenosaires.gob.ar/bafim](http://www.buenosaires.gob.ar/bafim)

### **MICA (Argentinian Creative Industry Market)**

This is a national government-sponsored bi-annual event. This event is run by the Creative Industries General Direction (Director is Mora Scillama). Although MICA was the biggest industry gathering event last year, because of political changes in the national government, future editions are likely to be much smaller, with the international focus placed on South America. Next year, the music coordinator is expected to be Paula Rivera, so it is important to contact her in order to secure opportunities to book artists or have promoters invited to the event. In order to be invited, the logic is the same as for live show business opportunities: it will be better to consider a manager/promoter who can also book and/or run shows in Canada, in order to enhance the possibility of a collaboration.

The most important activity in this event is that of the speed meetings. The conference has its own matching

platform, which is usually available a few weeks before the event. The logic of the platform is that every user can send and receive invitations for meetings, ensuring the process is self-managed.

The topics discussed during the conferences are the same as those at BAFIM, but with a more national and entrepreneurial focus. Not necessarily specific or technical conferences, they are more general with information, as they seek to train and hone the skillsets required in the industry.

### **Contact:**

Paula Rivera ([pr.produccionesculturales@gmail.com](mailto:pr.produccionesculturales@gmail.com))

Official website: <https://mica.cultura.gob.ar/>

### **Festival Ciudad Emergente**

This is a Buenos Aires government event, a public music festival dependent on the Ministry of Culture for a city which has a very wide artistic offer. Due to the fact that it is an event with both international bands and many local bands, it also works as an informal gathering for the industry, although it was not conceived as a conference. The best networking opportunities are in the opening stages of the festival.

The main programmer is Martín Rea, who has a special interest in rock. Regarding international bands, he works primarily with bookers and international entities such as embassies. Because the Government does not pay for international flights, they work through institutional collaborations. A particularity of Martín is that he likes to listen to recorded music with his Discman, so a good way to start lobbying an act is to send him an original CD of the band. Martín also is the main programmer for other government festivals that run under the same structure as Ciudad Emergente (this one is the most famous one), so he will be the best agent to contact in order to have opportunities in public festivals run by the government of Buenos Aires and the Province of Buenos Aires.

### **Official website:**

<http://festivales.buenosaires.gob.ar/es/home>

**Contact:** ([martinrea@yahoo.com](mailto:martinrea@yahoo.com))

**“For smaller independent bands, a good way to enter the Argentinian circuit in rock (indie rock, surf, grunge, stoner, hard rock, electro-rock) is by contacting Sylvie Piccolotto and Pablo Hierro from Scatter Records/Rock City Booking and Press Agency.”**

***Premios Carlos Gardel***

The is the annual phonographic award event, organized by CAPIF. This award is the most important recognition for the music industry and works as a big industry gathering event for local professionals and companies. This is probably not the best option for international acts, as it is an event focused on local content.

***CAPER (Argentinian Chamber of Suppliers and Manufacturer of Broadcasting)***

This is a private event that gathers audio technology and equipment experts. It is very likely that this is the sound event working with the biggest amount of multinational brands. Although it is an event that gathers the more technical aspects of the music industry, it is a good place to network with important figures of engineering, mastering, mixing, sound provision, software, broadcasting and technology.



## 2. RECORDED MARKET

### 2.1. Sales

Today, the average price for a CD is US\$10. The average price for a vinyl album is US\$28. Vinyl is growing in importance but is still a niche demand, most popular in electronic and indie genres.

**“It is said that the musical market in Argentina is very ‘local’. Argentinian repertoire grew in market representation from 34% in 2010 to 43% in 2014, while non-Spanish repertoire decreased from 45% in 2010 to 39% in 2014... In the City of Buenos Aires however, the trend is reversed, since most people prefer International Rock & Pop and Rock Nacional.”**

Digital sales are on the rise in South America, and Argentina is one of the markets that has developed a demand. Digital sales grew from US\$12.2 million to US\$29 million, an increase of 140%. Last year, streaming services represented 34.8% of the total revenue increase from the previous year and 86.6% of the digital revenue through subscription and ad-supported services. Downloads comprised the remaining digital revenue, but it is a fading market. In terms of the greater Argentinian recorded music market, revenue was divided as such:

**Digital - 20% (and rising)**

**Physical - 21% (falling)**

**Public communication rights - 58%**

**Synchronisation - 1% (and rising)**

This year, Premium subscription to Spotify rose to US\$ 4.50. The most popular genres on the platform are rock, cumbia and pop. Favourite national bands are Soda Stereo and No Te, while popular international bands include No Te Va A Gustar (Uruguay), Marama (Uruguay), Maroon 5, Ariana Grande, Sia, Rihanna, Ellie Goulding, Enrique Iglesias, Rombai (Uruguay) and Avicii (Sweden). The most followed playlists are those of reggaeton, cumbia and Latin ballads.

Physical sales dropped 30% and counting. This last year has been particularly bad due to the overall industry crisis as well as Argentina’s current recession. The current crisis was epitomised in the case of Musimundo, once the largest retail company in Argentina. Today, it no longer sells any records and rents its brand to domestic electronics companies.

The physical industry is not a recommended avenue for independent Canadian bands looking to penetrate the market. National artists have a difficult enough time, and international artists will only find this an even more challenging task.

DVD sales, including those showcasing live music, are not recommended, as the format is obsolete in the country and nearly nonexistent.

Sales tend to slow down between the first week of December and the third week of January.

**Mercado Libre** - This online platform is one of the four biggest local enterprises in Argentina, also known as a unicorn company. This can be a good online platform for any CD or DVD sales act to choose to undertake.

Website: [www.mercadolibre.com.ar](http://www.mercadolibre.com.ar)

### 2.2 Retail

The most important physical distributor is DBN (Distribuidora Belgrano Norte), which owns the main retail circuits, Musimundo and Garbarino. The larger stores work almost solely with mainstream music and are suffering a big crisis. This year, physical sales dropped nearly 20%.

There are almost 20 independent record stores in Buenos Aires. These are the best option for independent bands looking to sell their CDs, as musicians and consumers visit these places to discover new music. Most of these stores also sell tickets for live concerts, so these stores also provide further promotional opportunities. Some of the record stores are listed below:

**ZIVALS** is the choice record store for the independent industry. **Sales:** national/international/anglo **Genres:** rock, jazz, world music

**Contact:** [info@zivals.com](mailto:info@zivals.com)

#### **EXILES DISCOS**

**Sales:** national/international/anglo **Genres:** indie rock, jazz

**Contact:** [exilesrecords@gmail.com](mailto:exilesrecords@gmail.com), tel.: 011 4824-6191

**MILES DISCOS** caters well to tourists because of its strategic location in Palermo. **Sales:** national/international/anglo **Genres:** indie rock, jazz

**Contact:**

miles@milesdiscos.com.ar, tel.: 011 4832-0466

**MERCURIO** disquería is a small independent label.

**Sales:** national/international/anglo **Genres:** indie rock, jazz

**Contact:** mercuriodisqueria@gmail.com, tel.: 011 5320-5392

**RGS** concentrates on customers living in Villa Crespo

**Sales:** national/international/anglo **Genres:** rock, world music

**Contact:** info@rgsmusic.com.ar, tel.: 011 4854-5363

The big retailers are Musimundo and Garbarino. You can find these in local malls and big shopping centres in Buenos Aires and Argentina's other larger cities. Today, however, they are not the best circuit for emerging bands. As stated before, Musimundo had to close their music sales department and is now renting their brand to domestic electronics companies.

The following are events and strategies developed to increase the sales of recorded music. You will have to contact record stores directly in order to maximise effective promotion.

**Noche de las Disquerías (CAPIF)** This annual event is organized by CAPIF with the support of the Buenos Aires government. The event sees record stores open at night, offering discounts and different kinds of activities, promoting the consumption of music through physical records.

**Ferias de Discos (independent labels)** Throughout the year, there are different initiatives run by independent labels to promote CDs, vinyl and cassettes among young audiences and music lovers.

**Stands at festivals, concerts and within music circuits** One of the traditional and most effective strategies to sell CDs is through live concerts. When shows end, there are key spots in some venues to promote and display the discography of the bands. The average price is US\$10. At festivals and music cycles, independent labels tend to work together to create small fairs where they can promote their catalogues alongside merchandise.

### 2.3 Mobile

Mobile strategies for promotion are perceived to not have a huge impact on niche music consumers and are therefore primarily oriented at mainstream audiences. A few companies are listed below:

**CLARO MÚSICA**

This streaming service is the most popular among mobile users in Argentina. For almost US\$1 per week (or an alternative US\$2.60 per month with fewer services), customers of Claro phone service have access to a catalogue of more than 30 million songs.

**Contact:** diego.gullo@claro.com.ar

**FRI MOVISTAR**

This is a brand new app, released around September 2016. It tries to connect fans and consumers with their favourite artists and new music and is one of the most popular mobile and streaming services in Argentina.

**PERSONAL MUSIC**

This is a music experience for clients of the Personal company. Focused on local and latin content, it has partnerships with Sony, Universal, Warner, Pop Art, Leader Music and Magenta (a popular cumbia label). The app is free, but they have small promos of US\$1 to access a small amount of new music per week (around 5-10 tracks).

**BEAT MOBILE**

This company was created by Ivan Talkowsky, one of the music industry's top developers. Beat Mobile works with almost every label and mobile app development.

**Contact:** Ivan Talkowsky  
(italkowski@beatmobile.com.ar)

### 2.4 Streaming

Revenues from streaming services and downloads experienced a growth of 34.8% in 2015, and Argentina was the Latin American country with the biggest increase. Spotify is the leader in the streaming market in Argentina, although in the past year more competitors have entered

the market, namely Google Play Music, Apple Music and Tidal. Deezer is the oldest streaming service in Argentina, but they had not developed a local strategy and branding until 2016. None of these international streaming companies have branches in Argentina at the present time.

**Spotify** - The most popular streaming service in Argentina. Argentinian representation is managed by Jeffrey Group, a marketing agency that works with Facebook and other big companies. However, they don't have expertise in the music industry, so Spotify strategies are focused on marketing.

**Deezer** - Argentina representation is run by Bárbara Pavan. She curates several playlists showcasing emerging bands. Indie rock tends to be the most popular genre here.  
**Contact:** Bárbara Pavan ([bpavan@deezer.com](mailto:bpavan@deezer.com))

**Google Play Music** - Google Play began Argentinian operations in 2015, forging agreements with multinational major labels and 150 local independent labels, which allowed them to boast a collection of 30 million songs, that users can stream, download and store. The platform also formed Artist Hub, a tool for independent musicians to upload their songs and retain 70% of profits. It was created in an agreement with Sadaic.

**Apple Music** - Apple Music's Argentinian launch came just 24 hours after that of its competitor, Google Play. At US\$ 4.99 per month, users have access to over 37 million songs.

**Tidal** - Tidal will operate two versions: the premium costing 36 pesos and the 'hi-fidelity' version costing 72 pesos. Its catalogue boasts 40 million songs, as well as video content, social media manager capabilities and live content for special events.

**Portband** - This is a small music portal for new bands that provides streaming services along with photo and press interviews. It is run by Tomás Pergolini, the son of famous rock and technology media conductor, Mario Pergolini.  
**Tel.:** +54 9 11 4086-4396

**Pleyou** - This new platform is the so-called Netflix of the music business, as it displays audiovisual music content through live shows, live streaming, documentaries, videoclips, and own productions, working with local and international artists. You can create a user profile for free

and subscribe for 6 USD per month.

**Contact:** Lucas Jinkis ([lucas.jinkis@itclickvideo.com](mailto:lucas.jinkis@itclickvideo.com)).

### 2.5 Physical and digital distribution

#### *Digital distributors*

**The Orchard** (the head of The Orchard's Latin American division resides in Buenos Aires)

**Contact:** Laura Tesoriero ([ltesoriero@theorchard.com](mailto:ltesoriero@theorchard.com)) or Juan Núñez ([jnunez@theorchard.com](mailto:jnunez@theorchard.com))

#### **ONErpm**

**Contact:** Sylvie Piccolotto ([sylvie.piccolotto@gmail.com](mailto:sylvie.piccolotto@gmail.com))

There are also a few local digital distributors, the biggest of which is **FaroLatino**, which was an early pioneer in South America and now has offices in several countries throughout the continent. They work closely with SADAIC, YouTube and now Google.

**Contact:** Javier Fainzaig ([javier@farolatino.com](mailto:javier@farolatino.com))  
**Tel.:** +54 9 11 4143-4984.

Another important digital distributor, and growing in importance, is **Limbo Digital**, which offers a highly personalized treatment for each of its users.

**Contact:** Fer Isella ([fer@limbodigital.com](mailto:fer@limbodigital.com))  
**Tel.:** +54 9 11 62463377

**Mojo**, is a new digital distributor.

**Contact:** Tomás Talarico ([tt@mojo.com.ar](mailto:tt@mojo.com.ar))

#### **Submarino**

**Contact:** Seba Carril ([seba.carril@gmail.com](mailto:seba.carril@gmail.com))

#### *Physical distributors*

With a long history in physical distribution and understanding of the local market, key contact Guido Infiesta knows providers across Argentina and has survived all of the country's economic and industry crises. The former International Business Manager at DBN (Distribuidora Belgrano Norte), one of the largest distribution companies in Argentina, he is now in charge of Import / Export Services for Mexico, Brazil, Argentina and Chile at Music Brokers Argentina (MBB).

**Contact:** Guido Infiesta ([guido723@gmail.com](mailto:guido723@gmail.com))  
**Tel.:** +54 9 11 6170-2827

## 2.6 Industry players

The following is a list of key contacts when trying to break the Argentinian market.

**Diego Zapico** - He is a board member of CAPIF and the Director of the label Acqua Records.

**Contact:** [diego.zapico@acqua-records.com](mailto:diego.zapico@acqua-records.com)

**Cecilia Sívori** - The PR Director of CAPIF, she is responsible for strategies activities and events as well as institutional relations.

**Contact:** [csivori@capif.org.ar](mailto:csivori@capif.org.ar)

**Alberto Moles** - Director of Pop Art Discos, the mainstream label of Pop Art (an entertainment company), Moles is an important manager known for discovering and promoting some of Argentina's most famous domestic bands.

**Contact:** [alberto@popartmusic.com](mailto:alberto@popartmusic.com)

**Tel.:** +54 11 5632-6687

**Matías Loizaga** - Growing in importance as a member of Pop Art, he is a lawyer and musician and has important connections with producers and brands in the development of marketing and promotion strategies for bands, festivals and events.

**Contact:** [matias@poparmusic.com](mailto:matias@poparmusic.com)

**Alejandro Varela** - A big fish and legendary music industry player, he is the owner of S-Music, a large Argentinian independent label which licences and produces live concerts. Previously, he was president of CAPIF and EMI Argentina.

**Contact:** [avarela001@gmail.com](mailto:avarela001@gmail.com) or

[alejandro.varela@s-musicrecords.com](mailto:alejandro.varela@s-musicrecords.com)

**Tel.:** +54 11 4774 7119 or +54 9 11 4400-6561

**Gustavo Kisinovsky** - An owner of Ultrapop, one of the biggest independent labels of Argentina, he helps produce, license and distribute music all over Argentina.

**Contact:** [gustavo@ultrapop.com.ar](mailto:gustavo@ultrapop.com.ar)

**Tel.:** +54 11 4862- 8774

**Germán Andrés** - As part of the Ministry of Culture, Andrés coordinates the music department in the Under Secretary of Cultural Citizenship. Additionally, he is a key figure at the independent label Club del Disco and is a partner

of Ultrapop, one of the biggest independent labels of Argentina and the owner of distribution circuits.

**Contact:** [vermirando@gmail.com](mailto:vermirando@gmail.com) or

[german@clubdeldisco.com](mailto:german@clubdeldisco.com)

**Paula Rivera** - As part of the Ministry of Culture of the National Government, Rivera works in the music department of the General Direction of Creative Industries of the National Government. Additionally, Paula has a management agency called PR Producciones Culturales.

**Contact:** [pr.produccionesculturales@gmail.com](mailto:pr.produccionesculturales@gmail.com)

**Alejandro Ban** - He is the owner of entertainment company Indie Folks. They produce international shows and have a PR and management agency called Ban Bang. They also produce Music Wins Festival, a more indie- and emergent-focused event. This year, they booked Air.

**Daniel Grinbank** - A legendary producer in Argentina, he owns DG Entertainment and runs the famous festival, BUE. This year, the festival took place in Tecnópolis and boasted Iggy Pop and Pet Shop Boys in its line-up.

**Diego Finkelstein** - A large scale producer, he left Fenix Entertainment to create his own company called DF Entertainment. They have the licence for Lollapalooza Argentina.

**Gonzalo Solimano** - Owner of Unlock, an entertainment company and electronic label, he is a key player in the electronic scene and has vast experience working on and producing live events. Already boasting a strong catalogue, he develops artists and DJs from Argentina and books musicians from all around the world.

**Contact:** [gonzalo@unlock-e.com](mailto:gonzalo@unlock-e.com)

**Ana Poluyan** - She is the president of ACMMA, the Argentine Managers Association.

**Contact:** [poluyanana@gmail.com](mailto:poluyanana@gmail.com)

**Eduardo Rocca** - An important producer in Argentina's music industry, he knows how to navigate the industry and has a strong network of connections. He is also the manager of Babasónicos, one of the most mainstream bands in Argentina.

**Contact:** [eduardo@producecrack.com.ar](mailto:eduardo@producecrack.com.ar)

**Sergio Chiappetta** - Once an A&R representative for EMI and other major labels, he is now the manager for Gustavo Santaolalla. He has large network of contacts and good understanding of the local industry.

**Contact:** [chiappettasergio@gmail.com](mailto:chiappettasergio@gmail.com)

### 2.7 Trends

It is said that the musical market in Argentina is very 'local'. Argentinian repertoire grew in market representation from 34% in 2010 to 43% in 2014, while non-Spanish repertoire decreased from 45% in 2010 to 39% in 2014. These language trends are also linked to trends in musical genres. For instance, the most popular genres in Argentina are Romantic music, Folklore and Cumbia, and far behind lies Argentinian Rock ('Rock Nacional'), International Rock and International Pop. In the City of Buenos Aires however, the trend is reversed, since most people prefer International Rock & Pop and Rock Nacional.

The following genres are currently trending among young audiences in Argentina:

**Electronic & Roots.** Companies developing their business in these genres are Unlock, ZZK, Eternal Sunday, Estamos Felices and Surface Bookings. Venues programming Electronic & Roots are Niceto, Xirgu Espacio UNTREF and Blow.

**Indie & Psychedelic Rock.** Companies, venues and festivals to contact are: Niceto Club (Martes Indiegentes, Fiesta Invasión), Festival BUE, Music Wins Festival, Makena, Groove and Centro Cultural Matienzo. Some companies that will show interest in promoting the concerts of Canadian independent bands from these genres are S-Music, Rock City/Scatter Records and Geiser.

**Afro Beat & Dance Roots.** Companies, venues and festivals to contact are: Niceto Club, CC Matienzo and the Festival Latinoamericano de Afrobeat.

### 2.8 Strategies

**“Independent Canadian bands should focus mainly in developing their audience and market in the city of Buenos Aires first, and then explore possibilities in La Plata, Rosario, Córdoba and Mendoza.”**

Independent Canadian bands should focus mainly in developing their audience and market in the city of Buenos Aires first and then explore possibilities in La Plata, Rosario, Córdoba and Mendoza.

The local Canadian Embassy is aware of major opportunities for local grants in Canada, such as FACTOR. Although this a great government program for Canada, the local consequence of this is that the embassy does not save funds for the promotion of Canadian music, as they expect this issue to be covered and solved entirely by Canadian grants. This is why it is really important to lobby the embassy to show them the need for their support through two avenues:

1. Be active in the promotion of Canadian musical content at local festivals and music markets, such as BAFIM, MICA, Festival Ciudad Emergente, Festival Internacional de Jazz and other public events. The government must always look forward in communication with embassies and international organisations.

2. Create support programs (offer accommodation, VIP networking events) for FACTOR and other Canadian grants. For example, the Chilean Embassy is developing a long-term relationship with the Festival Director of the Ministry of Culture of the City of Buenos Aires. The Chilean Embassy will take care of accommodation and/or the flight tickets for artists and bands, and festivals like Ciudad Emergente or events like La Noche de las Disquerías will save spots to book Chilean music. This deal works proactively to generate new audiences for Chilean bands.

Alternatively, Canadian independent artists and their representatives could offer an exchange of promotion and distribution with Argentine counterparts, as the majority of domestic companies practice 360° deals (this means they do not only distribute music, but they develop a whole new business model around the promotion of their own artists).

## 3. LIVE MARKET

### 3.1 Promoters

**Pop Art:** one of the most important independent companies in Argentina, they produce massive mainstream festivals and run both a main label and a sub label dedicated to developing artists. They also own venues, have a very big presence in media press and work with Sony Music on distribution, venues and publishing subjects.

**Contact:** Matías Loizaga ([matias@popartmusic.com](mailto:matias@popartmusic.com)) or Diego Sáenz or Alberto Moles ([alberto@popartmusic.com](mailto:alberto@popartmusic.com))

**Festivals:** Movistar Fri Music (attendance of 35,000)

**International artists:** Lauryn Hill

**MTS Producciones:** a fast-growing entertainment and show business company dedicated mostly to the production of rock and metal concerts, although they also work with world music genres. They produce international shows and festivals, as well as manage iconic venues.

**Contact:** Pablo Name ([name@mtsproducciones.com](mailto:name@mtsproducciones.com)) or Favio Flores ([favio@mtsproducciones.com](mailto:favio@mtsproducciones.com)) or Carna ([carna@mtsproducciones.com](mailto:carna@mtsproducciones.com))

**Venues:** Vorterix, Teatro de Flores, The Roxy Live

**Festivals:** Monsters of Rock

**International artists:** O'Connor, Unisonic, Judas Priest, Manowar, Accept

**Indie Folks:** production company based in Buenos Aires, specialised in international independent rock.

**Contact:** Alejandro Ban, Promoter ([alebang@gmail.com](mailto:alebang@gmail.com))

**Venues:** Niceto, Tecnópolis.

**Festivals:** Music Wins Festival

**International artists:** Primal Scream, Air, Edward Sharpe and the Magnetic Zeros, Mac DeMarco, Mogwai

**S-Music:** a label and show business company (where it works in accordance with DalePlay), it is one of the biggest independent labels in Argentina and is well-known for developing artists with a good projection in both local and international markets. They have extensive knowledge of the Argentine industry and specialize in rock genres, although they do not work exclusively with that style. Boasting good media relations, they are respected throughout the entire industry.

**Contact:** Alejandro Varela, owner, and right-hand man Cecilia Crespo

**Venues:** Niceto, The Roxy Live, Opera Allainz

**International artists:** Alabama Shakes, Bjork, A Silent Film, Ed Motta, Gabin

Other promoters and promotion companies include:

**Gentil Irreverencia** (contact Horacio Nieto) and **Momer 360°** (contact Marcelo Moscheni) for progressive rock.

**Diana Glunberg**, a curator at mainstream music venue Niceto Club. With her team, she runs live shows in huge arenas like Luna Park and brings in international bands from around the world, as she is very active in international markets. She also maintains great relationships with public institutions and embassies.

**CLUMVI** (contact Nacho Perotti)

**Cristián Merchot** ([cristian@merchot.com.ar](mailto:cristian@merchot.com.ar)) is an important promoter and manager in the Argentinian music industry. With vast experience, he represents well-known artists and handles PR and media connections.

**Martín Liviciche** ([chiche81@gmail.com](mailto:chiche81@gmail.com)) is the owner of Sonoamérica, a label, live concert company and management agency. He's an expert in world music, has international experience and knows the local and regional markets very well. He was the organizer for Festival del Bosque, a huge public festival that was successful in the Kirchner era. Very active in international markets, he has good relations with public entities and embassies.

### 3.2 Booking agents

The economic arrangement for booking agents is generally an 80/20 split, with 20% being the percentage corresponding to the agent. That number can fluctuate between 15% and 25% but, on occasion, can go as high as a 50/50 if the artistic proposal concerns a solo artist.

### WORLD MUSIC

**Agitando Cultura:** Some of María's artists include Yacaré Manso, La Grande (a percussion ensemble that uses live improvisation to develop their shows), La Yegros (electronic cumbia and hip-hop), King Coya (electronic folkloric genre, with Andean and cumbia reminiscence), Axel Krygier (eclectic music producer, with a background in rock, but experimenting with electronic and synth sounds). Canadian music will have a better shot with María

if the style can capture traditional music (Latin, Indian and Asian influences) merged with urban styles and electronic music. She has built strong circuits in the African, Colombian and Brazilian music scenes, so she will also be a good agent to use for those territories.

**Contact:** María Carrascal ([mc@mariacarrascal.com](mailto:mc@mariacarrascal.com))  
Tel.: +54 9 11 5018-9914

**Índigo Producciones:** Nowadays, Débora is the Under Secretary of Citizen Culture in the Ministry of Culture of the National Government. Her activity as a booking agent has decreased since this appointment, but she has a big influence with venues, programmers, PR, labels and promoters on Buenos Aires's world music circuit. The style she works with is similar to those of María Carrascal, but it is more focused on acoustic and chamber sounds. Jazz, acoustic ensembles and virtuosos musicians will be well considered. Débora has a very good background in academic and classical music, and she works within "intellectual" music genres.

**Contact:** Débora Staiff ([debystaiff@gmail.com](mailto:debystaiff@gmail.com) or [dstaiff@indigoproducciones.com.ar](mailto:dstaiff@indigoproducciones.com.ar))  
Tel.: +54 9 11 3240-7122).

Another self-employed promoter in this genre is Ana Torrent.

**Contact:** [info@anatorrent.com.ar](mailto:info@anatorrent.com.ar) or [arielzarranz@anatorrent.com.ar](mailto:arielzarranz@anatorrent.com.ar)

#### ELECTRONIC

**Surface Booking:** This agency works closely with Estamos Felices. In fact, they share offices, usually produce shows together and share artists. Surface Booking started as a DJ platform, and because they conquer important venues, events and parties, they began to capitalize their influence by booking their own artists. The audience they attract is the metropolitan elite, the 25 to 35-year-old section of society in Buenos Aires.

**Contact:** Axel Meunier ([axel@surfacebookings.com](mailto:axel@surfacebookings.com))

**Estamos Felices:** This label and booking agency works with vintage sounds and modern electronic music. A well-known artist it represents is Chancha Vía Circuito, one of the most important figures in the new electro cumbia that has emerged in Buenos Aires in the last decade. They also work with urban sounds, such as reggae and hip-hop. In the last few years they have been producing Red Bull Batalla

de los Gallos, an event where rappers fight for the "best flow". Similar to Surface Booking, the Estamos Felices audience is targeted at wealthy 25 to 35-year-olds. Reggae, hip-hop and house acts are the agency specialty, as long as they also promote fashion in a unique style. Estamos Felices is into music and trends, and they work for fashion lovers and niche markets with high purchasing power.

**Contact:** Martín Mercado ([market@estamosfelices.com.ar](mailto:market@estamosfelices.com.ar))  
Pablo Antonietti ([panto@estamosfelices.com.ar](mailto:panto@estamosfelices.com.ar))

#### ROCK

**Rock City:** Sylvie and Pablo are probably the most important music agents in Buenos Aires working with rock and independent bands. They scout and discover new talents and, while very good at that, unfortunately they are a small team, so they regularly miss emails and have a lot of work. Their catalogue includes traditional rock, surf music, grunge, stoner, electro rock, psychedelic rock and any other imaginable rock subgenre. El Mató a un Policía Motorizado is probably the most important band they book internationally.

Rock City produces international shows and has an international music series of shows called Music is My Girlfriend, where they line up foreign bands. Sylvie travels frequently to international markets, so a good way to catch up with them is by inviting them to a music conference - or booking one of their bands.

**Contact:** Sylvie Piccolotto ([sylvie@rockcity.com.ar](mailto:sylvie@rockcity.com.ar) or [sylvie.piccolotto@gmail.com](mailto:sylvie.piccolotto@gmail.com))  
Pablo Hierro ([pablo@scatter.com.ar](mailto:pablo@scatter.com.ar) or [pablo@rockcity.com.ar](mailto:pablo@rockcity.com.ar))

#### POP AND URBAN

Booking & Management run by Adrián Canedo and Hernán Gutiérrez. They work with both mainstream and consolidated local artists in the music scene.

**Website:** <http://www.bmprod.com.ar/b-m.html>

#### Freelance

**Manuel Pizarro** - Manuel works freelance for many companies and labels, such as Pop Art and S-Music. He programs local rock venues such La Viola and Roxy and is well-known in the Buenos Aires rock ecosystem. He is also a press agent and manager, so he has extensive experience

in promoting bands. He is likely to be very open to working with independent Canadian bands, as long as they perform rock or meld that genre with interesting sounds. Manuel is responsible for the promotion of eclectic progressive rock band Octafonic with S-Music, as well as the progressive reggae band from Rosario called Sig Ragga. Los Reyes del Falsete is one of the more traditional rock bands that Manuel works with.

**Contact:** [manuelpizarro05@hotmail.com](mailto:manuelpizarro05@hotmail.com)

**Maru Polak** - [maru@marupolak.com](mailto:maru@marupolak.com)

#### GHETTO

**Contact:** [Sabrina Graña \(china@ghetto.com.ar\)](mailto:china@ghetto.com.ar)

**Tweety González** ([tweetygzz@yahoo.com](mailto:tweetygzz@yahoo.com))

### 3.3 Festivals

In Argentina, the term 'public festivals' refers to those that are free to attend. Some of the country's most popular are listed below.

**“Ciudad Emergente is probably the most influential of public festivals run by Buenos Aires’s government. Many famous bands get their start here, and each year the lineup increases in number. This year, over 100 bands of various genres were hosted, offering rock, folk, pop, urban, hip-hop, world and electronic music.”**

**Ciudad Emergente** is probably the most influential of public festivals run by Buenos Aires’s government. Many famous bands get their start here, and each year the lineup increases in number. This year, over 100 bands of various genres were hosted, offering rock, folk, pop, urban, hip-hop, world and electronic music. The festival hosts 300,000 people of all ages, although a large portion is composed of students and young people between the ages of 15 and 25. Since its inaugural edition in 2008, the event has been held at Centro Cultural Recoleta, but this year it moved to Usina del Arte, where it boasted three stages. The next edition is planned for the same area, as the government is looking to develop the area around it. The best person to get in contact with in regards to Ciudad Emergente is Martín Rea.

**Date:** *September 20 to 25, 2016 (next edition TBD)*

**Contact:** **Head Programmer and Artistic Director, Martín Rea** ([martinrea@yahoo.com](mailto:martinrea@yahoo.com))

**Festival Internacional de Jazz** is another festival run by the city’s government, and although it sells tickets (US\$ 10-13), there is a variety of free activities. It caters to jazz fans, offering traditional jazz music such as piano, chamber, jazz virtuosos and historic jazz alongside modern subgenres such as jazz pop, jazz with roots and electronic jazz. The last instalment hosted 46 international artists, although only Steve Zwanink, a double-bass player, represented Canadian talent, doing so alongside Ben Van Den Dungen of the Netherlands. Other international artists have included Maria Joao & Guinga (Portugal/Brasil), Tamarindo (USA), Dúo Peirani-Parisien (France), Jarry Singla & Eastern Flowers (Germany/India), Omer Avital Quintet (Israel), Edi Nulz (Austria/Germany), Louis Sclavis Quartet (France), Melissa Aldana (Chile), Dado Moroni Trío (Italy) and the Kuba Stankiweicz Trío (Poland), among others.

The festival is held at local venues around the city, from traditional public venues such as the Usina del Arte, Parque Centenario and Teatro Colón to private venues that are staples of the local jazz scene, such as Bebop Club, Café Vinilo and Thelonious Club.

Canadian artists are advised to contact Adrián Iaies one year in advance, as most international artists are secured through institutional collaborations, such as embassies. It is wise to offer masterclasses and workshops alongside the show as it provides the festival with a variety of content and acts as a promotional activity for ticketing. Martín Rea also works for this festival.

**Date:** *November 23 to 28, 2016 (next edition TBD)*

**Contact:** **Artistic Director, Adrián Iaies** ([adrianiaies@gmail.com](mailto:adrianiaies@gmail.com))

**Festival BUE** is run by industry legend Daniel Grinbank (DG Entertainment), one of the gamechangers of live music in Latin America. Festival tickets are priced around US\$ 70 for a 1-day ticket to US\$ 216 for a 2-day VIP ticket. Pop, Rock, Electronic, Roots, Latin and Hip Hop are usually always represented on the line up in some capacity. Past performers include Iggy Pop, Pet Shop Boys, Bomba Estéreo, Mala Rodríguez, Capital Cities, DJ Koze, Empress Of, Paul Kalkbrenner, Peaches, John Grant, The Flaming



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### 3. LIVE MARKET *Opportunities for Canadian Independent Music Companies in the Argentinian Music Market*

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Lips, Wilco and The Libertines.

**Date:** 14-15 October 2016 (next edition TBD)

**Contact:** [hola@festivalbue.com](mailto:hola@festivalbue.com)

**Lollapalooza Argentina** is run by is DF Entertainment (Diego Finkelstein) and will take place March 31 and April 1, 2017. It takes place at Hipódromo San Isidro, North of the City of Buenos Aires, with side shows at Vorterix, Niceto Club and The Roxy Live. Prices range from US\$ 88 for one day to US\$ 317 for two-day VIP access. Confirmed artists for 2017 include Metallica, Jimmy Eat World, The Strokes, The Weeknd, The XX, The Chainsmokers, Rancid, The 1975, Cage The Elephant, Catfish and the Bottleman, Two Door Cinema Club, Martin Garrix and Duran Duran. In 2016, Canadian artists Zeds Dead and A-Trak performed at the festival.

**Music Wins** is run by Alejandro Ban (Indie Folks). Its last edition ran on November 13, 2016, to an approximate audience of 15,000 people. It is located at Tecnópolis, Buenos Aires, and tickets cost US\$ 70. Rock, Garage, Pop, and psychedelic genres can be found at this festival. Past performers include Air, Primal Scream, Mac DeMarco, Edward Sharpe and the Magnetic Zeros, Courtney Barnett, Kurt Vile and The Violators The Brian Jonestown Massacre.

**Festival Guitarras del Mundo** is a celebration of guitars which occurs throughout the country during the month of October. It is produced with the help of the National Government.

**Contact:** [info@guitarrasdelmundo.com.ar](mailto:info@guitarrasdelmundo.com.ar) or Germán Andrés ([vermirando@gmail.com](mailto:vermirando@gmail.com))

Tel.: +54 11 5764-0246

#### Showcase

##### BAFIM

The 2016 edition of BAFIM showcased two Canadian bands: Foreign Diplomats from Indica Records and Chocolat from Heavy Trip. They were booked because they travelled with a large Canadian delegation from Montreal that was mobilized by SODEC (<http://www.sodec.gouv.qc.ca/fr/home>). The BAFIM organization was interested in having Canadian promoters and industry players at their event, so they made space for these two bands in their line-up to assure the presence of the delegation. Although the Canadian Embassy did not participate in this operation, our researcher proposes that, had they been involved as well, BAFIM would have booked three bands from the

delegation.

As the most international of the country's music conferences, BAFIM does not pay artistic fees. Instead, they provide artists with a promotion platform towards an audience of 100-200 industry professionals and cover technical and backline provision.

##### MICA

MICA is similar to BAFIM, but it has a stronger focus on the international circuit. However, last year's edition did not include a lineup of international artists, and the current political environment dictates that it is impossible to anticipate the re-introduction of international artists in the 2017 edition.

Canadian artists are advised to contact Paula Rivera (pr. [produccionesculturales@gmail.com](mailto:produccionesculturales@gmail.com)) in January/February 2017 for more news.

##### Summer

Festival de Verano is a festival run by the Buenos Aires government. Lasting for one week in January, it has an audience of approximately 100 people per day. In order to secure a place at the festival, artists will have to contact Martín Rea or other public festival programmers and are advised to get the support of the Canadian Embassy.

**Contact:** Martín Rea ([martinrea@yahoo.com](mailto:martinrea@yahoo.com))

Held in Córdoba, **Cosquín Rock** is one of the biggest and most important mass music events in Argentina. Its lineup features over 150 artists, and it is one of the biggest and most famous local festivals in the country. It has a strong national and regional identity, so there are probably no opportunities for Canadian independent bands, but it has hosted international bands in the past, such as Deep Purple and Die Toten Hosen, so it is still worth enquiring even if to receive recommendations for other local events or contacts.

**Contact:** José Palazzo, [info@envivoproducciones.net](mailto:info@envivoproducciones.net)

**Web:** <http://cosquinrock.net/>

##### Multi-arts

Centro Cultural Matienzo is a multi-arts venue that develops multiple events during the year combining different art expressions.

**Contact:** Gabriel Kirchuk ([gabikirchuk@gmail.com](mailto:gabikirchuk@gmail.com))

##### Genre

Most of the venues in Buenos Aires operate a 70/30 profit split arrangement. The biggest venues will also ask for a

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### 3. LIVE MARKET *Opportunities for Canadian Independent Music Companies in the Argentinian Music Market*

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guarantee fee to ensure they do not lose money in the event of the band failing to reach minimum attendance. This fee ranges from US\$ 330 to US\$ 987 depending on the size of the venue and its infrastructure. The best way to ensure a successful show is by sharing a gig with a local band that can attract the desired amount of attendees.

There are some venues that belong to CLUMVI (Live Music Clubs) which do not charge any fees to the musicians due to their share of public subsidies. CLUMVI is run by Nacho Perotti.

#### Rock

**Niceto Club:** Two stages, with an 800 cap at Niceto A, and a 250 cap at Niceto B.

**Contact:** Diana Glusberg ([dianaglusberg@gmail.com](mailto:dianaglusberg@gmail.com)). Located in Palermo.

**Centro Cultural Matienzo:** 350 people standing, 120 with tables.

**Contact:** Gabriel Kirchuk ([gabikirchuk@gmail.com](mailto:gabikirchuk@gmail.com)). Located in Villa Crespo/Palermo.

**Caras y Caretas:** 350 cap, fee split 70/30.

**Contact:** Leandro Marques ([leanmarques@gmail.com](mailto:leanmarques@gmail.com)).

**Teatro Sony:** 250 cap, fee split is 70/30. **Contact:** Matías Canepa ([mcanepa@popartmusic.com](mailto:mcanepa@popartmusic.com)). Located in Palermo.

**Xirgu Espacio UNTREF:** 485 people standing in a traditional theatre venue, which has changed its artistic programming to reach younger audiences.

**Contact:** Eve Vega ([eve.comunicacion@gmail.com](mailto:eve.comunicacion@gmail.com)). They have a piano.

**Other venues:** Groove ([jgan@jgan.com.ar](mailto:jgan@jgan.com.ar)), Uniclub ([laura@uniclub.com.ar](mailto:laura@uniclub.com.ar), [produccion@uniclub.com.ar](mailto:produccion@uniclub.com.ar)), La Viola Bar (Manuel Pizarro, [manuelpizarro05@hotmail.com](mailto:manuelpizarro05@hotmail.com)) and Gier Music Club ([bandas@giermusicclub.com.ar](mailto:bandas@giermusicclub.com.ar))

#### Electronic

**Niceto Club, Centro Cultural Matienzo and Xirgu Espacio UNTREF** book Electronic artists and DJs.

#### Pop and dance music

**Niceto Club, Centro Cultural Matienzo, Caras y Caretas and Teatro Sony** book Pop and Dance music.

#### Hip Hop & Urban

**Niceto Club, Uniclub, and Beatflow** ([irinacapponi@gmail.com](mailto:irinacapponi@gmail.com), [irina@beatflow.com.ar](mailto:irina@beatflow.com.ar)) book Pop and Dance music.

#### Metal

**MTS Producciones** manages three venues that program metal. For more information, contact Pablo Name ([name@mtsproducciones.com](mailto:name@mtsproducciones.com)), Favio Flores ([favio@mtsproducciones.com](mailto:favio@mtsproducciones.com)) or Carna ([carna@mtsproducciones.com](mailto:carna@mtsproducciones.com)).

#### Acoustic and small venues

**El Universal** ([info@eluniversalespaciocultural.comn](mailto:info@eluniversalespaciocultural.comn) / [fedepetro@openfolk.com.ar](mailto:fedepetro@openfolk.com.ar)) and **Roseti** ([rosetiespacio@gmail.com](mailto:rosetiespacio@gmail.com)) are two cultural venues in Buenos Aires hosting regular indie and folk performances to more intimate audiences.

#### 3.4 Touring structure

A good way to gain support for a tour is by working with the Canadian Embassy.

Logistics: A good idea when planning a tour in Argentina is to start the route in the city of Buenos Aires. Follow this with a show in La Plata (a university city with important industry players and bands very open to attending live music concerts), then Rosario, Córdoba, ending the tour in Mendoza in order to continue moving on to Chile. Mendoza is the biggest city in the Cuyo Province and is next to Chile and the bilateral route. Important promoters to contact in each city are:

**La Plata:** Martín Liviciche - Sonoamérica ([chiche81@gmail.com](mailto:chiche81@gmail.com))

**Rosario:** Morena Velázquez ([morenavelazquez@gmail.com](mailto:morenavelazquez@gmail.com))

**Córdoba:** Karol Zingali - Oficina de Artistas ([oficinadeartistas@gmail.com](mailto:oficinadeartistas@gmail.com))

Transport: INAMU, the Instituto Nacional de la Música (National Institute of Music) offers travel discounts with buses. **Contact:** [info@inamu.gob.ar](mailto:info@inamu.gob.ar)

Accommodation: In Buenos Aires, a nice boutique hotel costs an average rate of US\$ 98 per night. The best neighbourhoods are San Telmo and Palermo, because both are touristy and have several music venues.

Hostels have a price range that goes from US\$ 33 to US\$ 50 per night.

**Backline:** For advice and equipment, contact Fernando Vecchio of DVS at [fervec2001@yahoo.com.ar](mailto:fervec2001@yahoo.com.ar) or CAFIM (Argentinian Chamber of Musical Instrument Manufacturers), an association which gathers different music suppliers, including a vast number of drum manufacturers. Created in 2012, the chamber is already wealthy and rapidly growing. With negotiation, they can be of real help for backline requirements.

**Contact:** Vice-President, Nikanor González Bienes ([nikjgobi@hotmail.com](mailto:nikjgobi@hotmail.com)).

**Security:** It is advised to take special care of personal security, since robberies during performances and while on tour have been reported in Argentina. Besides keeping personal electronics and musical instruments under vigilance in a safe place while performing, it is also recommended that at least one member of the band stays inside the vehicle until every piece of equipment has been unloaded at the venue location.

#### 3.5 Fees and logistics

There is usually a 70/30 split at venues, with 70% of the ticket revenue going to the artist and 30% retained by the venue as profit. The average ticket fee is between 150-200 pesos (approx. US\$ 9-12).

Therefore the minimum artist fee should start at US\$ 263, progressing to US\$ 460 and US\$ 658 for bands bringing in around 200-300 people. For bands attracting an audience of 400-500 people, rates should be between US\$ 987 to US\$ 1316, and upwards of US\$ 2,000 for bands attracting crowds of 500-700. These prices are relative, but can provide an overview of minimum rates. For example, a band with 10 years of experience and a well-developed audience can charge around US\$ 5,900.

**Guarantee fee:** for 500-800 people, the rate is between US\$ 658 to US\$ 1,316.

**SADAIC:** the rate is 12%, and sometimes the band is responsible for paying this fee.

#### **Fees by festival:**

Usually festivals provide the rider, a sound technician and in some cases, the backline. Festival Ciudad Emergente pays 5,000 pesos (approx. US\$ 314), on average, and the same stands for other public festivals. In the cases of BAFIM and MICA, there is no payment for artists.

#### **Other costs to consider include:**

**Backline rent:** DVS

**Contact:** Fernando Vecchio ([fervec2001@yahoo.com.ar](mailto:fervec2001@yahoo.com.ar))  
Tel.: +54 9 11 3264-7687

**Airport transfers:** the cost of getting from Ezeiza airport to downtown Buenos Aires in a 12-person capacity van with a driver is US\$ 150, on average.

**“There are some venues that belong to CLUMVI (Live Music Clubs) which do not charge any fees to the musicians due to their share of public subsidies.”**

## 4. PUBLISHING MARKET

### 4.1 Collection societies regime

**“CAPIF (Argentinian Chamber of Phonograms and Videograms Producers) is one of the most important chambers in the country, representing labels and collecting recorded music rights. However, it does not represent all labels in the country, as the majority of the labels in Argentina operate more like collectives than actual companies.”**

The phonographic industry is run by the following entities:

**CAPIF** (Argentinian Chamber of Phonograms and Videograms Producers) is one of the most important chambers in the country, representing labels and collecting recorded music rights. However, it does not represent all labels in the country, as the majority of the labels in Argentina operate more like collectives than actual companies. Argentina still does not have favourable conditions for operating professional businesses. Unfortunately, CAPIF is very reluctant to provide information and statistics. Their last public study was released in 2013, when the economic situation of the country and industry dynamics were different.

**Contact:** Javier Delupi, CEO ([jdelupi@capif.org.ar](mailto:jdelupi@capif.org.ar)) and Cecilia Sivori, Public Relations ([csivori@capif.org.ar](mailto:csivori@capif.org.ar)).

**AADI** (Argentinian Interpreters Association), founded in 1954, manages the collection and distribution of performing rights for musicians. It is part of FILAIE, the Federación Ibero-latinoamericana de Artistas Intérpretes y Ejecutantes (Federation of Ibero-Latin American Performers).

**Contact:** Sergio Vainikoff, Co-secretary ([sergiovaini@gmail.com](mailto:sergiovaini@gmail.com)), Horacio Malvicino, President ([hmalvicino@aadim.org.ar](mailto:hmalvicino@aadim.org.ar))

Authors, performers and the publishing industry are overseen by:

**SADAIC** (Argentinian Rights Society of Authors and Composers), founded in 1936, is one of the biggest authors collective regimes in the world. They are the sole collective society for author rights in the country, having the structure to monitor the whole country. They can even call public police when demanding payments, making them the only private organisation to own that right.

**Contact:** Víctor Yunes ([vyunesc@sadaic.org.ar](mailto:vyunesc@sadaic.org.ar)) and María José Orueta ([orueta@sadaic.org.ar](mailto:orueta@sadaic.org.ar)).

**AADET** (Argentinian Society of Theatre Entrepreneurs) is the chamber that unites the most important theatre entrepreneurs of Argentina, especially in Buenos Aires. This city is one of the three most prominent cities in the world for live theatre, having a periodic offer of more than 500 plays simultaneously. There are key music industry players representing music in the society due to the large amount of live and recorded music being performed in venues all around the city.

There are a few musicians unions and organizations in the country, including:

**SADEM**, the main musicians union. It plays an important role in representing artists that make public appearances on TV shows, demanding minimum fees and conditions for its member musicians.

**FAMI** (Argentinian Federation of Independent Musicians) represents 27 different independent musicians associations from all around Argentina. Its president is Esteban Agatiello, a lawyer and musician very active in different initiatives involving musicians as industry players.

**Contact:** Esteban Agatiello, president ([nan\\_richter@yahoo.com.ar](mailto:nan_richter@yahoo.com.ar))  
Tel.: +54 9 11 4939-6298

**INAMU** Is a public institution was created through a law and is independent of the government, although it is a public entity. It aims to promote, support, preserve and disseminate Argentina's musical activity. They actively champion maintaining healthy live music circuits, especially those smaller venues that book emerging artists.

**Contact:** [info@inamu.gob.ar](mailto:info@inamu.gob.ar)

**“SADAIC (Argentinian Rights Society of Authors and Composers)...are the sole collective society for author rights in the country, having the structure to monitor the whole country. They can even call public police when demanding payments, making them the only private organisation to own that right.”**

**SADAIC** this organisation pays its members thrice annually: April, August and November. Usually, it will take up to a year

for payment to be delivered. SADAIC is a private society, but since 1930, it has been recognized by the national government as the only recognized author collection society. To claim revenues, a form detailing the the setlist from the live performance must be presented.

**AADI-CAPIF** Although AADI and CAPIF are two separate private societies (the former in charge of performing rights and the latter phonographic content), both societies work as one.

### 4.2 Industry standards

Various publishing companies have Argentinian branches, including Peer Music, Sony A/TV, Warner Chappell and Ricordi. One of their golden rules is that bands or artists must have the capacity to sell 400 tickets per show. Peer Music keeps 25% of rights revenue, while Sony and Warner keep 10%.

Publishers also have the responsibility to provide the song repertoire and venue information prior to the act's live performance. This will be sent to SADAIC, which then distributes the royalties to the artists according to their scheduled payment three times per year.

### 4.3 Sync Opportunities for English catalogues

**The Fain Music:** This is one of the biggest sync and music production companies for television, advertising, cinema and other media formats. They have global presence and are always seeking new catalogue additions. International artists: Baby Blood, Rockwell & Wylde, Nordic Noir, Matthew Perryman Jones, Joshua Radin, Little Children and Bad Veins.

**Contact:** Daniel Fainzilber ([daniel.f@thefainmusic.com](mailto:daniel.f@thefainmusic.com)).

**La Pirada:** Televisual sync in Argentina and the rest of Latin America.

**Contact:** Owners and Founders Juan Carlos Varela ([juank@lapirada.com](mailto:juank@lapirada.com)) and Eduardo Blacher ([edu@lapirada.com](mailto:edu@lapirada.com))

**Music Partners:** They collaborate with brands and creative directors on TV advertising campaigns. They also work with Claro Música.

**Contact:** Cristián Castellani ([cristian@musicpartners.com.ar](mailto:cristian@musicpartners.com.ar))

**432 Hertzios:** This is a publisher, label and 360° company that is developing a platform to sync music catalogues. They work with independent filmmakers.

**Contact:** Nicolás Madoery ([nicolas@cuatrotresdos.net](mailto:nicolas@cuatrotresdos.net)).

Other sync opportunities include Musicalizadoras de TV, Disney, Polka and independent sync agent Cris Morena.

## 5. SECONDARY MARKET

### 5.1 Gaming

Although the videogame industry is growing in importance, the reality is that almost every company, studio or developer uses original music for their creations. The majority of the composers are young, and payment is arranged privately. This informal dynamic means the SADAIC does not have a role in this industry, so they do not recollect and distribute payments. In the same way, there are no music publishers working for local gaming developers. Be warned that, in this kind of environment, opportunities for Canadian bands are very limited, to say the least. However, there are a few contacts which may help secure deals.

**“Although the videogame industry is growing in importance, the reality is that almost every company, studio or developer uses original music for their creations.”**

**ADVA** is the Argentinian Association of Videogame Developers. It is the organization that gathers the country's biggest stakeholder companies and studios, a collection of 45 companies. While they do not consider music in the early developmental stages of games, they do see music as a fundamental part of the post-production chain. For commercial opportunities, contact [mmartin@adva.com.ar](mailto:mmartin@adva.com.ar).

**FUNDAV** is the new Argentinian Videogame Foundation. Contact Alejandro Iparraguirre, a co-founder, for PR relations and an overview of the circuit. Alejandro represents the national government's videogame sector and has been involved in almost every video game event and circuit in Argentina.

Web: <http://fundav.com/>

**Contact:** Alejandro Iparraguirre ([alejiparraguirre@gmail.com](mailto:alejiparraguirre@gmail.com))

Tel.: 011 6566-0234

**Christian Perucchi** is a composer and producer who works for most of local video game developers.

**Contact:** [christianperucchi@gmail.com](mailto:christianperucchi@gmail.com)

Tel.: 11 6361-5446

**Sounds Fun** is the studio that created the music and special effects for the video game Preguntados.

**Contact:** Marisol Vilardo ([soundsfunfx@gmail.com](mailto:soundsfunfx@gmail.com))

### 5.2 Merchandise

Merchandising should be part of the strategy for business and brand development of niche genre bands in Argentina. The key selling points are after live concert shows and festivals. Good spots include the doors, the bathrooms and at any food or beverage stand, if applicable.

Some merchandise companies include:

**Magma Pro**

**Contact:** [magmapro@gmail.com](mailto:magmapro@gmail.com)

**Icarus (metal)**

Web: <http://www.icarusmusic.com.ar/>

**Contact:** Marcela Scorca ([marcelamusic@gmail.com](mailto:marcelamusic@gmail.com))

### 5.3 Brand engagement

For spots, contact Music Partners, who coordinate advertising campaigns. They are discussed further in Section 6.

Web: <http://www.musicpartners.com.ar/>

**Contact:** Cristián Castellani ([cristian@musicpartners.com.ar](mailto:cristian@musicpartners.com.ar))

Bullbenny is a clothing brand that is usually open to working with independent bands. They show preference towards punk, harcorde, hip-hop and urban styles.

Web: <http://www.bullbenny.com.ar/>

**Contact:** [ventas@bullbenny.com.ar](mailto:ventas@bullbenny.com.ar)

Brandtrack.fm is a platform that curates the music selection in commercial stores all around Argentina. They have clients such as Burger King, KFC, Four Seasons, Wendy's, Sodimac and Falabella, and today they are one of the country's most successful startups, with regular investment rounds in Silicon Valley.

Web: <https://brandtrack.fm/>

**Sonorización** is a group of curators that selects music for specific events and spaces.

**Contact:** Diego Poso ([info@diegoposo.com](mailto:info@diegoposo.com))

### 5.4 Film, radio, gaming

Opportunities in licensing for Canadian independent music are very limited in the Film and Radio sectors, since they have been affected by budget cuts from the administration and are struggling to promote new content.

#### Film industry societies

**APAC** (Association of Audiovisual Producers of Córdoba)

Web: <http://www.asociacionapac.org/>

**Contact:** [asociacioncba@gmail.com](mailto:asociacioncba@gmail.com)

#### PCI (Independent Film Directors Association)

Web: <http://www.pcicine.com/>

**Contact:** [president.fernandomadedo@gmail.com](mailto:president.fernandomadedo@gmail.com) or  
[Ricardo Manetti \(ricardomane@gmail.com\)](mailto:ricardomane@gmail.com)

#### MUSIC PRODUCTION COMPANIES

##### Ideas del Sur

Web: <http://www.ideasdelsur.com.ar/>

**Contact:** [prensa@ideasdelsur.com.ar](mailto:prensa@ideasdelsur.com.ar)

Tel.: +54 11 4556-9000

##### FANM Music Supervision

Web: <http://www.fanm-music.com/>

**Contact:** [cinthia@fanm-music.com](mailto:cinthia@fanm-music.com)

Tel.: +54 11 4790 2830

#### FILM COMMERCE CHAMBERS

**DAC** is the society of audiovisual directors.

Web: <http://www.dac.org.ar/>

**Contact:** [declaraciondeobra@dac.org.ar](mailto:declaraciondeobra@dac.org.ar)

**INCAA** is the Audiovisual National Institute.

Web: <http://www.incaa.gov.ar/>

**Contact:** [incaa@incaa.gob.ar](mailto:incaa@incaa.gob.ar)

## 6. MEDIA AND PR

### THE WRITTEN PRESS

The mainstream print outlets are La Nación, Clarín and Página 12, and the main journalists are Gabriel Plaza, Humphrey Inzillo and Yumber Vera Rojas. However, Rolling Stone, Inrockuptibles, and Prensario are the only written press outlets in Argentina dedicated exclusively to the music industry.

#### Prensario

**Contact:** Director Alejo Smirnoff (alejo@prensario.com) or Diego Álvarez (diego@prensario.com or diegoprensario@gmail.com)

#### Indie Hoy (independent)

Web: <http://www.indiehoy.com/>

**Contact:** Rodrigo Piedra (rod@indiehoy.com)

#### Indie Hearts (independent)

Web: <http://www.indiehearts.com/>

**Contact:** Bárbara Pavan (bpavan@deezer.com) or Artezeta (Claudio Kobelt, claurock@gmail.com)

#### 90 + 10 (independent)

Web: <http://90mas10.com/>

### FREELANCE JOURNALISTS

#### Federico Martínez Penna -

who writes for publications such as Billboard

**Contact:** federico@vomb.com.ar

Tel.: +54 9 11 5821-6738

#### Leonardo Ferri -

who writes for Argentina's branch of Rolling Stone

**Contact:** ferrileonardo@gmail.com

#### Gabriel Kirchuk

who writes for publications such as Billboard

**Contact:** gabikirchuk@gmail.com

### TERRESTRIAL RADIO

As anywhere, there are two radio circuits: FM and AM. The former is used in Argentina's main cities and the latter along long distance roads, in rural areas and in smaller cities throughout the country.

#### Mainstream FM radio stations include:

##### Metro 95.1 FM

Web: <http://www.metro951.com/>

##### La 100 99.9 FM

Web: <http://la100.cienradios.com/>

**Contact:** Diego Poso (info@diegoposo.com)

##### Continental 590 AM

Web: <http://www.continental.com.ar/>

##### Rivadavia 630 AM

Web: <http://rivadavia.com.ar/>

##### Rock & Pop 95.9 FM

Web: <http://fmrockandpop.com/>

##### Mega 98.3 FM

Web: <http://mega.radios-argentinas.com/>

##### Nacional Rock 93.7 FM

Web: <http://www.radionacional.com.ar/nacionalrock/>

#### Industry radio stations include:

##### Radio Blue 100.7 FM

Web: <http://bluefm.com.ar/>

**Contact:** china@ghetto.com.ar

##### Vorterix 92.1 FM (MTS Producciones)

Web: <http://radio.vorterix.com/>

##### Delta 90.3 FM (electronic music)

Web: <http://fmdelta903.com/>

**Contact:** Mela Melitón (mela1000@gmail.com)

##### Aspen 102.3 FM

Web: <http://www.fmaspen.com/>



### **La Tribu 88.7 FM**

Web: <http://fmtribu.com/>

**Contact:** Nicolás Falcoff ([nicofalcoff@gmail.com](mailto:nicofalcoff@gmail.com))

**Radio Colmena** (a new station, very popular among people between 25-35)

Web: <http://www.radiocolmena.com.ar/>

**Contact:** Gabriel Kirchuk ([gabikirchuk@gmail.com](mailto:gabikirchuk@gmail.com)) or Federico Martínez Penna ([federico@vomb.com.ar](mailto:federico@vomb.com.ar))

### **RQP 104.3 FM**

Web: <http://www.rqp.fm/>

**BitBox 93.3 FM** (soul and funk)

Web: <http://bitbox.fm/>

### **Lalo Mir**

(independent radio host and television presenter)

### **ONLINE RADIO**

The best contact for online radio is Yesica Bernardou ([consultora.visionempresarial@gmail.com](mailto:consultora.visionempresarial@gmail.com)), who heads up **Radio Trend Topic**, one of Argentina's leading web radios. She also is head of CADERO, of the Argentine Chamber of Online Radios. Yesica created the first award system for online radios in the country.

### **TELEVISION**

Because 2016 was a year focused on political, economic and social transition for Argentina, music television shows are currently not relevant in the grander scheme of the industry.

Industry television channels broadcasting international music are **Much Music** ([tumuch@muchla.com](mailto:tumuch@muchla.com)) and **Canal de la Música - CMTV** ([cm@cmtv.com.ar](mailto:cm@cmtv.com.ar)).

### **PR AGENCIES AND AGENTS**

**Agencia PiCo:** This agency has an extensive knowledge of Buenos Aires's rock scene. Growing in influence, it now collaborates with Pop Art.

**Cecilia Sívori:** Cecilia is the PR Director of CAPIF, the Argentine Chamber of Phonograms and Videograms Producers, and she boasts key relationship with radio producers, television content programmers, private and public institutions, labels and other chambers.

**Contact:** [csivori@capif.org.ar](mailto:csivori@capif.org.ar)

**Rock City:** Run by one of the most dedicated teams in Buenos Aires's independent music scene, Rock City's circuit is focused on emerging bands. They are experts in rock, indie rock and the derivative genres thereof. Organizers Sylvia and Pablo promote both local and international artists, run and produce shows at Niceto and The Roxy Live and offer PR services through their press agency. Their previous positions in radio have also given them access to extensive contacts in that circuit. Sylvia often travels to international conferences and, as a Brazilian, is also well-connected in the Brazilian industry.

**Contact:** Sylvia Piccolotta and Pablo Hierro

**Carlos Sidoni:** Perhaps the best way to describe him is as a consultant. He was one of the primary producers of MICA in both 2013 and 2015 and was a partner of Fer Isella. He has worked on past editions of MICA, developing local and international markets, and he is a well-known press and PR agent. He also runs workshops for entrepreneurs and emerging companies and artists.

**Contact:** [carlos.sidoni@gmail.com](mailto:carlos.sidoni@gmail.com)

**Cecilia Crespo:** Head of PR for S-Music and the right hand man of Alejandro Varela, she boasts extensive institutional and media relations.

**Contact:** [cecilia.crespo@s-musicrecords.com](mailto:cecilia.crespo@s-musicrecords.com)

Finally, the agency **Music Partners** works for both multinational and domestic brands to secure television and advertising content. In addition to providing music consultancy for various clients, they work as a PR agency for the music production in television and different medias, connecting brands with sync companies and original music companies.

Web: <http://www.musicpartners.com.ar/>

**Contact:** Cristián Castellani ([cristian@musicpartners.com.ar](mailto:cristian@musicpartners.com.ar))

### **6.1 How the PR market works**

**“Music promotion in Argentina focuses heavily on Facebook advertisement, since it is a very cost-effective way to get to the target audience.”**

Music promotion in Argentina focuses heavily on Facebook advertisement, since it is a very cost-effective way to get to the target audience. The local industry is struggling to find ways to attract new audiences and increase engagement. Live shows are a challenging area in particular, and it is proving difficult to guarantee a regular influx of audience.

The average fee for Argentinian PR services is between US\$ 395 and US\$ 658 per month, with a recommended 3-month term of operation. In order to construct the most effective strategy, artists will need fresh material to incorporate into a large show, tour promotion or promotion for a new album. There are a few agencies that work with international bands, including Ban Bang, Rock City and Pico Agencia, which are listed in sections 2.6, 6.3 and 6., with contact details where available.

**“The average fee for Argentinian PR services is between US\$ 395 and US\$ 658 per month, with a recommended 3-month term of operation. In order to construct the most effective strategy, artists will need fresh material to incorporate into a large show, tour promotion or promotion for a new album.”**

### 6.2 Media and PR opportunities for Canadian content

Below are three independent and music-specific media outlets targeted at an audience of independent producers, programmers, journalists, radio curators, musicians and fans. They are more open to collaboration than mega companies such as Rolling Stone, Billboard and Inrockuptibles (however, other large media companies such as La Nación, Clarín and Página 12 are fairly open to collaboration).

The best way for a new independent band to coordinate press coverage is through the media sources listed below, which will help them to start building an audience and

capture the interests of journalists and industry players. They are more oriented towards indie rock audiences, but they will also show interest in electronic, folk and electro-pop artists.

#### **Indie Hoy**

**Contact:** Rodrigo Piedra (rod@indiehoy.com)

#### **Indie Hearts**

**Contact:** Bárbara Pavan (bpavan@deezer.com)

#### **Silencio**

**Contact:** Roque Casciero (roque@silencio.com.ar)

### 6.3 Key media and PR contacts

#### **MTS Producciones (Rock)**

Manuel Pizarro (at Pico Agencia)

**Contact:** info@picoagencia.com.ar

#### **Rock City (Rock)**

Morena Velázquez (at Rosario)

**Contact:** morenavelazquez@gmail.com

**Claudio Kobelt** (Indie and emerging Rock and Pop)

**Contact:** klaurock@gmail.com

#### **AK Promotion**

**Contact:** Juan B. Palomeque (Reggae / Dub)  
artekombucha@gmail.com

**Leandro Frías** (Jazz and avant-garde)

**Contact:** lea@leandrofrias.com.ar

#### **Unlock (Electronic)**

**Contact:** Gonzalo Solimano (gonzalo@unlock-e.com)

#### **Music Partners**

**Contact:** Cristián Castellani  
(cristian@musicpartners.com.ar)

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## 6. VISA SYSTEM, TAX WITHHOLDING POLICY AND OTHER PRACTICAL INFORMATION

*Opportunities for Canadian Independent Music Companies in the Argentinian Music Market*

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# 7. VISA SYSTEM, TAX WITHHOLDING POLICY AND OTHER PRACTICAL INFORMATION

For any administrative process which involves migration, the visitor should refer to the National Directorate of Migration (Dirección Nacional de Migraciones), dependant upon the Ministry of Internal Affairs, Public Works and Housing of the National Government.

**Contact:** [info@migraciones.gov.ar](mailto:info@migraciones.gov.ar)

**Web:** <http://www.migraciones.gov.ar/>

### Canadian Embassy, Argentina

**Web:** <http://www.canadainternational.gc.ca/argentina-argentinian/index.aspx?lang=eng>

**Address:** Tagle 2828, Buenos Aires

**Contact:** [bairs-cs@international.gc.ca](mailto:bairs-cs@international.gc.ca)

**Hours:** 14:00 to 16:30, local time

### Public Affairs Office

**Contacts:** Beatriz Ventura, cultural attaché ([beatriz.ventura@international.gc.ca](mailto:beatriz.ventura@international.gc.ca)); or for commercial subjects, contact Ana Garasino ([ana.garasino@international.gc.ca](mailto:ana.garasino@international.gc.ca)) and Natalia Puente ([natalia.puente@international.gc.ca](mailto:natalia.puente@international.gc.ca)).  
**Tel.:** (54-11) 4808-1095

### OBTAINING A WORK PERMIT

Foreigners travelling to Argentina with the purpose of performing work (either paid or unpaid) need a visa issued by the National Directorate of Migration (Dirección Nacional de Migraciones) in Argentina. A promoter can be responsible for arranging the visa permits for the band or artist.

The charge for lodging a working visa application varies from country to country and as well as between consulates. The average is set around US\$100 per application fee, as well as an additional certification charge from the consulate costing US\$80. Bands must already have a work contract with an Argentinian company to apply, and this employment agreement has to be signed in the presence of the consul.

The following documents are required when applying for an Argentinian work permit:

**Labour contract** with the local company,  
**Certified Spanish** translation of birth certificate,  
**Passport** with a minimum validity of 18 months after entry date and  
**3 passport photos.**

The typical visa for a Canadian independent artist or company would be the Article 29 (e) visa. This visa is issued for short-term work lasting for 15 days and is extendable for a further 15 days.

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Opportunities for Canadian Independent Music Companies in the  
Brazilian Music Market

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**Researcher:** *Luiza Morandini & Sound Diplomacy*

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# 1. OVERVIEW

Both the music and live concert scenes across the country are well followed. There is a local music scene in almost each part of the country [ie. Techno Brega in the North, Axé Music in the Northeast and the so-called 'Sertanejo Universitário' ('University Country Music') all over Brazil], which makes for an active music industry with a functioning framework and network of venues, industry events, and showcasing opportunities.

Interest in foreign artists is abundant. Big acts like Paul McCartney, Norah Jones and Madonna as well as including Canadian artists such as Alanis Morissette, Michael Bubl , Avril Lavigne, Arcade Fire and so on, regularly tour the country. Large festivals also take place throughout the year, such as Rock in Rio (Rio de Janeiro), Tomorrowland (S o Paulo), Lollapalooza (SP), MECA (SP, RJ, MG) and S nar (SP).

The Brazilian independent music scene is highly promising. However, this doesn't imply that it is easy or always profitable. Venues, agencies and festivals still face many challenges in bringing international artists to the country, mostly due to the current economic and political crisis in Brazil. It must also be taken into account that Brazil has bureaucracies and processes that make it not only a unique, but also an especially complex country to deal with.

**“Historically, the media industry has been located in Rio and S o Paulo, and the music industry has been centred around Rio de Janeiro, S o Paulo, Belo Horizonte, Bahia and Recife. Much of Brazil’s culture focuses on Rio and S o Paulo, and most major events and international music festivals take place in these two cities.”**

## 1.1. Market size and dynamics

When looking at Brazil as a market, the country’s considerable size must be taken into account. Historically, the media industry has been located in Rio and S o Paulo, and the music industry has been centred around Rio de Janeiro, S o Paulo, Belo Horizonte, Bahia and Recife. Much of Brazil’s culture focuses on Rio and S o Paulo, and most major events and international music festivals take place in these two cities.

Due to its geographical scale, it can be quite difficult for artists to make money on venue tours in Brazil outside the economic centres. Therefore, it is recommended to base a first trip around the Southeast of Brazil.

The following key aspects are highlighted from each major urban centre:

### S o Paulo

S o Paulo is a business hub for corporations and large companies. It is the main entry point to contact digital companies and services to launch musical content; international artists usually look at S o Paulo as the key city to enter the market. It hosts the majority of independent music labels, studios, venues and festivals. Many international music companies have based their Brazilian HQs in the city.

### Rio de Janeiro

Rio is home to the film and TV industries. Traditionally, it was home to music too, until S o Paulo overtook it. Rio used to be the hotbed for traditional Brazilian music, but it was not able to keep up with new genres and trends as rapidly as S o Paulo. Rio still boasts a number of relevant independent music acts and venues.

### Belo Horizonte

Belo Horizonte has an important indie music scene, and it is considered the Brazilian city for Rock and Metal. Nightlife is strong in this city, and it is also the home of the country’s largest Jazz Festival.

Brazil is currently in the midst of a widespread political and economic crisis, with culture and the creative industries being one of the worst affected sectors. Sales are in decline across the board, whether that be tickets for concerts, buying records, going to the movies or even going out for dinner. However, the digital media revolution has allowed the Brazilian consumer to access a huge amount of content at the click of a button. The process of production, marketing and distribution has benefitted from digitalisation as well. Nevertheless, rapid inflation and unemployment rates reaching 11.6% in 2016 are threatening the sustainability of this scenario.

Many Brazilian record labels and live music events depend on financial support from privately/publicly funded cultural projects and public cultural programs. The Rouanet law, for

instance, is a mechanism that the Brazilian government has set in place to develop cultural programmes and provide financial resources to independent promoters. Usually, only projects that have received public funding are able to tour, cover expenses and pay fees to foreign acts. Outside of these organisations and the big industry players, Brazilian music businesses struggle with their finances.

Specific public incentives are in place in different regions, states or cities. In São Paulo, the State Culture Department's ProAC/ICMS provides 100% tax deductibility of sums not exceeding 3% of total monthly goods and service tax payments by legal entities. Many other states also have a local public funding policy.

### 1.2. How to navigate the marketplace

**“International artists usually look at São Paulo as the key city to enter the market. It hosts the majority of independent music labels, studios, venues and festivals. Many international music companies have based their Brazilian HQs in the city.”**

Brazil presents awkward barriers when attempting to penetrate the national music market. A large amount of overseas multinationals are trying to operate in Brazil, but locals lack appropriate professional skills and experience to develop and finalise business deals. Another issue from an industry perspective is that it is rare for independent companies to help artists with initial funding for recording, promotion and distribution of music.

Having a presence on the main streaming platforms, an existing fanbase on social media and hiring a local agent are the minimum requirements for entering the market in Brazil.

Having a local agent on side is almost indispensable to develop a tour, and their knowledge will help a touring act connect with key players, such as other artists, music producers and specific labels and distribution companies.

**“Youtube is a key entry point for Canadian independent bands and artists, since virtually all relevant age groups in Brazil consume music through the platform. Music vlogs are**

**highly influential and have become a crucial promotional tool.”**

Youtube is a key entry point for Canadian independent bands and artists, since virtually all relevant age groups in Brazil consume music through the platform. Music vlogs are highly influential and have become a crucial promotional tool. On a more mainstream level, radios are still the biggest platform for listening to music today.

Spotify, Deezer and other digital companies are gaining audience acceptance.

It is difficult to provide unanimous consensus on the regions that artists should tour. Experts interviewed for this report consider that the whole country would be relevant, depending on the band's genre. In general, the following circuits could be relevant to independent Canadian artists: São Paulo, Rio de Janeiro and Belo Horizonte (Southeast), Curitiba and Porto Alegre (South), Recife and Fortaleza (Northeast), Belém do Pará (North) and Goiânia and Brasília (Central-West).

Performing in São Paulo, Rio de Janeiro and Porto Alegre is more suitable for shorter tour if bands were to continue through South America, for instance to Buenos Aires (Argentina), Santiago (Chile) or Bogotá (Colombia).

Sponsorships may not be confirmed until the very last moment, due to the uncertainty of the market and availability of financial resources. Because of the economic crisis, it is difficult for festivals to confirm their lineups far in advance. It is common for artists to be confirmed only one or two months prior to the date. This can make fitting Brazil into a South American tour quite difficult and it has deterred some international acts in the past.

### 1.3. Trade conferences and industry gatherings

**SIM SP | SÃO PAULO | SOUTHEAST REGION  
| 10 - 13 DECEMBER 2016**

*Genre: all kinds of music, mainly Indie / Indie Rock, some Electronic Music, some World Music and some Jazz.*

**SIM SP** (São Paulo's International Week of Music) is one of the biggest and most important music conventions in Latin America. It is held over five days.



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## 1. OVERVIEW *Opportunities for Canadian Independent Music Companies in the Brazilian Music Market*

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The convention focuses on new music markets, new concepts and ideas that are transforming the music scenario worldwide. SIM spreads discussion around these topics over three areas: 1. Exposing new musical tendencies (SIM Live); 2. Access to new and relevant information (Convention); and 3. Incentives for new partnerships (Business and Networking).

SIM Live, dedicated to live music, is organised into two sections; daylight showcases, held at the CCSP (São Paulo Cultural Center), and night shows, both held in association with music companies or public and private cultural institutions in Brazil and other countries.

The convention concerns lectures, debates and workshops with local guests and twelve other countries.

Business and Networking represents the business side of the convention, with meetings, round tables and delegate-only areas.

In 2016, SIM SP hosted the panel 'Getting to know the Canadian music market and the specifics of Quebec', with Franz Schuller (Indica/Canadá), Michael Bardier (Heavy Trip/Canadá), Gourmet Délice (Bonsound/Canadá), Dan Seligman (Pop Montreal Festival/Canadá), Jean-Phillipe Sauv  (SODEC/Canadá), Sandy Boutin (Simone Records/Canadá).

<http://www.simsaopaulo.com/en/agenda-2016/>

Also, as part of the 2016 programme, Schweppes and Music Non Stop hosted the following acts: Foreign Diplomats, Lex Deuxluxes and Random Recipe.

**Contact:**

Director: Fabiana Batistela  
fabiana@inker.art.br  
Inker Ag ncia Cultural  
55 11 2369.5360/5363  
55.11.9.9719-5558

**PORTO MUSICAL - PERNAMBUCO | NORTHEAST REGION  
| USUALLY IN FEBRUARY EVERY YEAR (BEFORE  
BRAZILIAN CARNIVAL)**

*Genre: World Music, some Indie / Indie Rock, some Electronics*

Porto Musical is one of the most important and

consolidated meeting events for music professionals in Brazil. Including seminars, speed-meetings, roundtables and shows, Porto Musical is an established event with international visibility. The event encourages networking, the exchange of contacts and new business and industry knowledge.

Fina Produ  o and Astronave Iniciativas Culturais are responsible for Porto Musical, in cooperation with Womex and the technology park Porto Digital. Founded in 2005, it brings together labels, websites, artists, promoters, music agents, festivals and cultural institutions.

So far there have been 7 editions with 101 concerts and 160 conferences. In 2015 Porto Musical hosted 750 business round-tables, with over 4,000 professionals attending the conferences and more than 50,000 people attending the concerts.

The 2017 edition, however, has been cancelled, due to the main sponsor pulling out. The organisers are working on ways to consolidate the conference's future in the long term.

Director: Melina Hickson  
[melina.hickson@gmail.com](mailto:melina.hickson@gmail.com)

Feira da M sica - Fortaleza | Northeast | October 2016  
Genre: World Music

In 15 editions, Feira da M sica has developed a reputation for encouraging the exchange of knowledge between industry professionals. It has also brought visibility to hundred of artists and bands by offering them the chance to perform at the event.

Director: Ivan Ferraro  
[ivanfeira@gmail.com](mailto:ivanfeira@gmail.com)  
[ivan@prodisc.org.br](mailto:ivan@prodisc.org.br)  
Tel: 85 99998-3398

**RIO MUSIC CONFERENCE (RMC) | RIO DE JANEIRO  
SOUTHEAST | 15 - 28TH FEBRUARY 2017**

*Genre: Electronic Music*

Rio Music Conference (RMC) is the biggest gathering for electronic music and the nightlife industry in South

America. Besides the programme of panels, roundtables and meetings, the program also offers workshops and networking opportunities. Following on from the conference, a massive festival featuring the biggest artists in dance music scene takes place to coincide with Rio Music Carnival. The festival takes place at Marina da Glória, one of Rio's most beautiful venues, whilst the conference is held at the breathtaking Porto Maravilha, a complex featuring the new Mauá Square, the MAR (Rio's Museum of Art) and Santiago Calatrava's work, the Museu do Amanhã.

The first edition of RMC came about as the dance music industry in Brazil and Latin America quickly developed. Brazil is amongst the top five countries in terms of revenue from the dance music business.

There are numerous seminars, debates, panels and workshops during the three days of Rio Music Conference and several days of RMC Club Week.

<http://www.riomusicconference.com.br/about/>

The event also organized a special "Latin American edition for the Rio Music Conference", which was held in São Paulo, between 29th of November and 1st of December. <http://www.riomusicconference.com.br/noticias/rmc-sao-paulo-2016-veja-a-programacao-completa-da-conferencia/> Former curator: Leo Janeiro

<https://www.facebook.com/leo.janeiro.5>

### **MUSIC TRENDS BRASIL | RIO DE JANEIRO | SOUTHEAST REGION | NOVEMBER 2016**

This is an international music conference which discusses new formats and music business models bringing together the entire industry chain of production, distribution and promotion.

Topics: Live concerts, music and artist production, digital market, audiovisual sync and entrepreneurship.

National partners in 2016: Som Livre, Light, UBC, Abramus, ABPD, ECAD, Crowley, Punks S/A, culturaXchange, Ponte Plural, MobContent, Musicness, Crama Design, ESPM, Rio Soft, Canal Box Brasil, Portal Sucesso and MPB FM.

International partners in 2016: Merlin, CD Baby, Altafonte, Napster, WIN, Women in Music, Spotify, Deezer,

Vevo and Bmat.

<http://www.musicrendsbrasil.com/palestrantes>

### **RIO MUSIC BUZZ | RIO DE JANEIRO | SOUTHEAST REGION | DECEMBER 2016**

Organized by ABMI - Associação Brasileira de Música Independente.

#### ***All genres***

In 2013, ABMI (Brazilian Independent Music Association) and the Coordination of Creative Economy of Sebrae (Support Services to Micro and Small Companies) hosted the first ABMI Digital & Sync Seminar in Rio de Janeiro. The purpose of the event was to foster best practice for the Brazilian phonographic industry in the new digital music market. The panelists presented and debated alternatives and solutions for the music market in the era of the internet.

The event was a huge success. From an original proposal of 6 panels and 3 workshops, the venue hosted 31 panels, 5 round tables, 4 workshops and 2 table-format interview, and as well as one-on-one meetings with 21 Brazilian and foreign companies.

Originally targeted at small groups of entrepreneurs, the first ABMI Digital & Sync Seminar attracted the interest of music professionals from all areas: record companies, publishers, PROs, agents, artists, musicians, media and 30 international executives. Almost 250 registrations took place.

The following year, rebranded as Rio Music Buzz, the event moved to a new space and had even more registrants. Close to 400 music professionals from all over Brazil and foreigners attended for three days of learning, trading and networking.

At its third edition, Rio Music Buzz has become the most important international venue of the music industry in Brazil and will receive close to 500 music professionals from Brazil and abroad.

Open from 10 a.m. to 9 p.m. the programming begins with an overview of the music market with experienced music executives. Panels touch on different issues in the industry

such as the live scene, the rise of streaming, the evolution of radio, etc.

Rio Music Buzz hosts showcases of Brazilian music from the independent music scene and a handfull of workshops featuring music placement, web promotion, composition and neighboring rights. Artists and musicians have the opportunity to meet representatives of the main streaming platforms in the market (Spotify, Deezer, Rdio, Napster).

International participants include Joel C. High, music supervisor and producer, founder and board member of the “Guild of Music Supervisors”; Hanna Grzeszczyk, co-founder of Media IP Rights Ltd; Jan Sparby, co-founder of Iphigenia Publishing and author of the “Black Belt in Music Book Series”; Steve Mayall, co-founder and executive director of Music Ally; Tracy Mann from SXSW; Sergio Arbelaez, curator of Circularart, an important Colombian Music Festival; Laura Tesoriero, Chairwoman of the Latin Grammy, and many others.

Brazilian executives attending the conference include Aloysio Reis, CEO of Sony ATV; Carlla Bastos, Marketing Manager at Warner Music Brasil; Thomas Roth, ABMI’s president; Antonio Gutierrez, director at Rec-Beat Produções; Bruno Vieira, General Manager at Rdio Brasil; and Roberta Pate, Spotify’s Label Relations Manager Brazil.

<https://www.facebook.com/riomusicbuzz>

General Director: Carlos Mills

## 2. RECORDED MARKET

### 2.1. Sales

**“Globally, Brazil represented the 10th largest recorded music market in 2015, with a trade value of US\$ 247 M. The recorded market in Brazil (physical + digital) posted an income increase of 10.6% in 2015, boosted by the continuity of the growth of digital sectors (+45.1%).”**

The last report published by IFPI in 2016 highlighted Brazil's importance as the largest market in Latin America, despite decreasing -1.8% from 2014. Globally, Brazil represented the 10th largest recorded music market in 2015, with a trade value of US\$ 247 M. The recorded market in Brazil (physical + digital) posted an income increase of 10.6% in 2015, boosted by the continuity of the growth of digital sectors (+45.1%). Income from music distribution in digital formats represented 61% of the total combined physical and digital sales in Brazil, compared to 48% in 2014.

According to the Pro-Music Information Resource ([www.pro-music.org](http://www.pro-music.org)), digital music services available in Brazil are: Apple Music, Claro Música, Deezer, Google Play, Groove Music Pass, iTunes, Kboing, Microsoft Music Store, Mundo Oi, Napster, Spotify, Terra Musica Powered by Napster, TIDAL, VEVO and YouTube.

According to the Brazilian Association of Disc Producers, the local phonographic market (physical and digital) saw an increase in its income of 10.6% in 2015, boosted by the continuity of the growth of digital area (+45.1%).

Decreasing physical sales (-19.3%) and significant increasing in share of the digital music market (+45.1%) prove that the distribution of recorded music through digital media, either streaming, downloading or mobile consumption, is already a tangible reality in Brazil. In fact, streaming models, either subscription based or ad based, represent respectively 35.5% and 30.1% of the digital music's total revenue in 2015.

The physical market, despite declining, is still very important for the income of independent artists. The major record labels and top-selling independent artists are able to afford placing music in mainstream retail spaces, mostly because they can distribute their music in bulk and have a large audience.

Vinyl sales are growing in Brazil like in the rest of the world. Many reissues of classic Brazilian albums have seen the light

of the day in recent years, and big indie artists continue to put out music on vinyl. Because of the high import taxes on consumer goods and a notoriously slow postal customs service, the vinyl market is centred around the label Brazilian Records. There is currently one vinyl pressing plant in Brazil, called Polysom (<http://www.lojapolysom.com.br>).

According to Jornal da Globo, vinyl demand in Brazil has increased in the past couple of years. In 2014, 102,000 vinyls were pressed in Rio de Janeiro. In 2015, it was 123,000 discs. The figure is over 150,000 in 2016.

### 2.2. Retail

Retail is still the most reliable income stream for independent artists in Brazil. Artists often produce a small amount of physical albums, mostly sold during showcases, other live performances and through their online store.

### 2.3. Mobile

Mobile companies are increasingly developing strategies to include music in package deals for phone contracts. Many streaming platforms are merging with mobile services. For example, Deezer, one of the first and still one of the biggest streaming platforms in Brazil, is contracted to TIM, one of the biggest mobile companies in Brazil. In their deal, any customer purchasing a monthly contract with TIM gets automatic access to Deezer at no extra cost.

Ring back tones (RBTs) are also popular in the country. Mobile companies approach publishers to create RBTs, which use 30 seconds of a song, as chosen from the mobile company's catalogue by the customer. Instead of listening to the usual ringing sounds when calling someone, the caller will instead hear a snippet of a song chosen by the receiving number.

### 2.4. Streaming

A 2014 study from ConsumerLab stated that Brazilian streaming users are mostly young people between 15-24 years of age. Youtube appeared to be the most popular streaming platform. Because of the high number of smartphone users (estimated 60 million devices in 2014), streaming has already shown a growing potential in this increasingly digital market.

**“In Brazil, Spotify has developed partnerships with several music festivals and venues, as well as with some top-selling artists. The company**

### has a reputation of not being as artist promotion friendly as Deezer.”

In Brazil, Spotify has developed partnerships with several music festivals and venues, as well as with some top-selling artists. The company has a reputation of not being as artist promotion friendly as Deezer.

Spotify stated that its user base had grown to 100 million by 2016, of which 40 million are premium users. Premium users have been estimated to account for 12% of total users in Brazil.

#### **Contacts:**

Vivi Portela

Brand Experience & Partnership - Brazil  
Marketing Manager  
viviportela@spotify.com

Fernando Spuri

Brand Experience & Partnership - Brazil  
M: +5511998451360  
Skype: fernando.spuri  
fernandospuri@spotify.com

Deezer is one of the oldest streaming services in Brazil.

#### **Contact:**

Daniela Porto  
+55 11 97424-4086  
dporto@deezer.com

VEVO and INgrooves contacts also available and worth pursuing.

#### **Contact:**

Camila Zanetin  
Marketing Manager VEVO e INgrooves Music no Brasil  
camila.zana@alumiaproducoes.com.br

### 2.5. Physical and digital distribution

In Brazil, independent artists usually release their songs using a free download format or through streaming platforms. They do this mainly to promote their music, since they expect the biggest revenue streams to be from merchandise and physical album sales at their concerts.

#### **Tratore**

Tratore is a specialized distributor that works with independent productions and a network of physical and

digital multimedia outlets.

In order to be included in their catalogue, the artist/author fills must fill out an online form, pay a subscription fee and, in the case of physical distribution, send an initial quantity of 50 units to Tratore. From there, the product is offered to some of the biggest stores in Brazil, such as Livraria Cultura, FNAC and Livraria da Vila, as well as digital stores such as iTunes, Spotify, Deezer, Napster and Google Play. The artist will receive a quarterly payback for their sales.

Tratore would be a suitable distribution company for Canadian independent artists, although its current catalogue is mostly Brazilian music.

**Contact:** Maurício Bussab  
mauricio@tratore.com.br

#### **CD Baby (mainly digital)**

The company's catalogue includes many Canadian artists, and Marcos Chomen, who represents CD Baby in Brazil, would be happy to share data on target markets and demographics should an artist or band request it.

**Contact:** Marcos Chomen  
Business Development Brazil, CD Baby  
chomen@cdbaby.com

#### **Musica**

Operating since 2000, iMusica is an important digital content provider for the main mobile operators and music services in Brazil and worldwide. The company also develops download and streaming platforms and creates music branding solutions for major brands.

The company manages a catalog of 18 million tracks and licensing agreements with a large number of Brazilian and international labels such as Sony Music, Universal Music, Warner Music and EMI as well as major copyright organizations in Brazil and in the Latin Market.

#### **Contact:**

Diogo Zuhlsdorff De Paiva, CEO  
diogo.paiva@imusica.com.br

#### **Other relevant contacts:**

**ONERPM.** Emmanuel Zunz, ez@onerpm.com

**Believe Digital.** Suellen Santana, Label Manager/Trade

Marketing, [suellen.santana@believedigital.com](mailto:suellen.santana@believedigital.com)

**INgrooves Music Brasil.** Camila Zanetin, Marketing Manager, VEVO & INgrooves Music Brasil, [camila.zana@alumiaproducoes.com.br](mailto:camila.zana@alumiaproducoes.com.br)

**Altafonte.** Fábio Silveira, Label Manager Brazil, [fabio.silveira@altafonte.co](mailto:fabio.silveira@altafonte.co)

**“In Brazil, independent artists usually release their songs using a free download format or through streaming platforms. They do this mainly to promote their music, since they expect the biggest revenue streams to be from merchandise and physical album sales at their concerts.”**

### 2.6. Industry players

**ABMI** is the main contact for all things related to independent labels in the country, since it organises workshops and meetings and participates at the most important international industry gatherings.

**Balacava Records** is one of the most recognised independent record label and agencies in Brazil, based in São Paulo.

**“Balacava Records is one of the most recognised independent record label and agencies in Brazil, based in São Paulo. Founded in March 2012 by Fernando Dotta and Rafael Farah, the company works in publishing, booking, promotion, licensing, PR, executive production and career management.”**

Founded in March 2012 by Fernando Dotta and Rafael Farah, the company works in publishing, booking, promotion, licensing, PR, executive production and career management. Besides working with several Brazilian artists, Balacava has licensed bands from labels such as Merge Records, K Recs, Barsuk Records, Captured Tracks, Sinderlyn, Kanine Records, Polyvinyl, Stones Throw Records and Azul de Tróia.

The label's roster currently includes 40 artists: Alex Bleeker and the Freaks, Bilhão, Bonifrate, Cabana Café, Câmera, Champu, Clearance, Crusader de Deus, Frabin, HALA, Holger, HOMESHAKÉ, Juan Wauters, Luzialuzia, Mac

McCaughan, Mahmed, Medialunas, MENEIO, Mild High Club, Minks, Nuven, Ombu, PARATI, Quarto Negro, Radiation City, RØKR, Séculos Apaixonados, Sensible Soccers, Shed, Single Parents, Splashh, Supercordas, Terno Rei, The Shivas, The Soundscapes, Trails and Ways, Tyburn Saints, Wedding, Widowspeak and Yuck.

The label frequently produces 'Balacava Apresenta', a label showcase in different venues and cities. In 2015, the company created its own festival in São Paulo, BALACLAVA FEST, featuring independent local and international acts. Balacava is also responsible for Sacola Alternativa, a fair dedicated to independent record labels and producers, with a program that includes workshops, panels, music documentaries and showcases as a way to highlight businesses that stand out in their local alternative scenes.

As an agency, Balacava has booked and promoted the following tours around Brazil: Mac DeMarco, Tycho, Allah-Las, Real Estate, Sebadoh, Mac McCaughan, Crocodiles, Swervedriver, Yonatan Gat, Jerry Paper, The Shivas, Trails and Ways, Buffalo Moon, HALA and Jonathan Toubin.

The label is currently discussing potential deals with the following Canadian artists: Solids, Heat, La Foster, Homeshake, Patrick Watson and Andy Shauf. Last year, the label attended POP Montreal, looking to build relationships with Canadian artists.

**Contact:**  
Rafael Farah  
Artistic Director  
[info@balacavarecords.com](mailto:info@balacavarecords.com)

**Evandro Fióti** is the owner of indie label Laboratorio Fantasma. Evandro is a music producer and singer and also manages his brother Emicida, one of the biggest rappers in the country. He would be a great person to speak to for his knowledge of the country's hip hop scene.

**Contact:** [evandro@laboratoriofantasma.com](mailto:evandro@laboratoriofantasma.com)

#### **D-Edge Records**

Independent record company releasing Techno, House, Disco and Ambient music. Linked to the famous D-Edge Club and D-Agency.

**Contact:** [label@d-edge.com.br](mailto:label@d-edge.com.br)

**YB Music, licensing company.**

Founded in 2003, it represents a catalogue of over 100,000 tracks from Brazil and around the world, for audiovisual synchronization productions.

**Contact:** Maurício Tagliari, owner and artistic director  
(mauricio.tagliari@gmail.com)

**The Brasil Music Exchange (BME)** was developed by Brazil Música & Artes to facilitate the connection between Brazilian and international companies, establishing partnerships and generating business opportunities. They have also produced showcases at Canadian Music Week.

**Contact:** David McLoughlin, International Manager  
david@bma.org.br

### 2.7. Trends

Domestic household brands such as Natura and Skol have recently started promotional schemes based around music: Natural Musical and Skol Music. They are funding studio sessions and producing music videos and touring opportunities. Other brands have also followed suit.

The reemergence of local country music subgenres is being witnessed all across the county. Música Sertaneja (Country Music), is the oldest and most traditional variety, but new sub-genres such Sertanejo Universitário (University Country Music) and Sertanejo Pop (Pop Country Music) are popular amongst youngsters and university students.

In the North and Northeast, local dance music is very popular. Acts such as Axé Bahia and “techno-tacky music” reflect the strong tradition of carnival in these states. In the South and Southeast, where the majority of the population lives in urban areas, electronic, classical, folk, blues and jazz music are the preference. For this reason, the South and Southeast tend to be more open to new music from the Western world.

**“Almost every independent record label in Brazil has their own home studio or an agreement with an existing studio.”**

### 2.8. Strategies

Most of Brazil's successful artists and managers see recorded music as a marketing platform to reach the higher levels of revenue streams in the business, especially live music. Market investment is a very important element of success, with PR and radio promotion, television, press and digital media strategies all needed.

Another way into the market would be through independent labels, arranging tours with similar sounding local artists, or performing at festivals. Indie labels often have a 360° business strategy for their artists, including booking, live production, festival production and studio work. Almost every independent record label in Brazil has their own home studio or an agreement with an existing studio.

#### INDEPENDENT LABEL CONTACTS:

##### **Balaclava Records | indie rock/folk/pop**

Balaclava Records have booked some international artists, including Canadian Mac deMarco twice: once for his first performance in Brazil in 2014 and the second time in 2015 for the Balaclava Festival promoted by the label itself.

**Contact:** Rafael Farah

Email: balaclavarecords@gmail.com

info@balaclavarecords.com

Website: <http://www.balaclavarecords.com>

##### **Laboratório Fantasma | indie rock/folk/pop**

**Contact name:** Evandro Fióti (CEO)

Email: evandro@laboratoriofantasma.com

Phone: +55 11 2337-0271

##### **Selo RISCO and Canoa Music Studio | indie rock/folk/pop**

Producer: João Bagdadi

Email: joao@selorisco.com

Phone: +55 12 98208-7175

Owner/Music Producer/Owner of Estúdio Canoa: Guilherme Jesus Toledo

Email: guijesus@selorisco.com

Phone: +55 11 99912-0526

Owner/Producer: Guilherme Giraldi

Email: guigiraldi@selorisco.com

Phone +55 11 99188-6368

##### **Freak Label**

Contact name: Andres Tobal

Email: freakpe@gmail.com

Phone: +55 11 2528-1528

+55 11 9602-0247

Website: <http://www.freakestudio.com>

## 3. LIVE MARKET

### 3.1. Promoters

The promoters below are large-scale concert promoters that also book independent artists. They should be approached once Canadian independent bands have developed a partnership with a Brazilian label.

**“[Promoters] should be approached once Canadian independent bands have developed a partnership with a Brazilian label.”**

#### **MOVE CONCERTS** | <http://moveconcerts.com.br>

Move is a young company in the Latin American entertainment business. Formerly known as Mondo Entretenimento, it used to be one of the biggest players in the market of national show business. Around 2012, Mondo Entretenimento and Grupo ABC came together, turning into XYZ LIVE. Now Move Concerts is again independent, operating under the name Move Concerts Brasil. The company is also present in other countries in Latin America, namely Argentina, Chile, Peru, Colombia and Venezuela.

#### **MERCURY CONCERTS** | <http://www.mercuryconcerts.com>

Mercury Concerts is responsible for the production of large capacity festivals, including Ruffles Reggae, Close-up Planet, Skol Rock, Kaiser Music and Monsters of Rock.

With more than 20 years' experience, it has booked some of the world's biggest acts, including AC/DC, Bon Jovi, Iron Maiden, Kiss, Yes, Black Sabbath and others. David Gilmour's gig in 2015 with Mercury was considered the best international concert of the year.

#### **TIME 4 FUN** | <http://www.t4f.com.br>

Besides being one of the most important promoters working with important artists, T4F promotes independent artists concerts and produces one of the biggest music festivals in Brazil, Lollapalooza.

#### **GRUPO VEGAS** | São Paulo

The group runs and programmes the following venues:

Cine Joia (992) | <http://cinejoia.tv/joia> | See more in section “Showcases”

Z Carniceria | capacity: 300 | See more in “Showcases”

Riviera Bar | capacity: 150 to 250

Lions | <https://www.facebook.com/lionsnightclub>  
| Club Yacht <https://www.facebook.com/ClubYacht/>

#### **Contact:**

Facundo Guerra (owner)  
Marcelo Beraldo (Music Programmer and owner)  
[mberaldo@barong.com.br](mailto:mberaldo@barong.com.br)

#### **QUEREMOS | RIO DE JANEIRO**

<https://www.queremos.com.br/>

This crowdfunding company is considered among many promoters as a specialist in bringing foreign acts to Brazil.

#### **Contact:**

Bruno Natal (co-founder)  
[bnatal@gmail.com](mailto:bnatal@gmail.com)

#### **COY FREITAS**

Audio (venue/agency/ Skol Music)  
[coyfreitas@icloud.com](mailto:coyfreitas@icloud.com)  
<http://www.audiosp.com.br/>

### 3.2. Booking agents

Due to the devaluation of local currency, it is getting increasingly difficult to book international artists. Therefore, acts that can expense their travel costs to their own countries, through export agencies, local embassies, Consulates or Cultural Institutions, have a much better chance of touring Brazil.

#### **Balacava Records**

**Contact:** [info@balacavarecords.com](mailto:info@balacavarecords.com)  
Rafael Farah (co-owner)

#### **Loner Sheep**

**Contact:** [contato@lonersheep.com.br](mailto:contato@lonersheep.com.br)  
Izabel Muratt (owner and booking agent)  
+55 (11) 98116-3731

#### **Alexandre Wesley**

T4F | Lollapalooza Brazil  
Email: [awesley@t4f.com.br](mailto:awesley@t4f.com.br)



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Wesley began his career in production, sales and promotion in communication conglomerates. He has worked in artistic marketing and new business development for major companies like Warner Music and Universal Music. Since 2012, Alexandre has worked as the International Tour Manager at Time 4 Fun, the third biggest entertainment company in the world.

#### **On Agency (Tim Adams)**

**Contact:** [tim@onagency.com.br](mailto:tim@onagency.com.br)  
<http://www.onagency.com.br/>

Led by Brazilian-based Canadian music producer/DJ/booker Tim Adams, On Agency is an international booking agency providing quality talent since 1996.

Previously Toured Artists: Grace Jones / Lisa Stansfield / Yasiin Bey (Mos Def) / Kaytranada / De La Soul / Jazzanova Live / DJ Jazzy Jeff / Moodymann / Gill Scott Heron / Tony Allen / Questlove / Mixmaster Mike / Rich Medina / Kid Koala / Keb Darge / The Brand New Heavies / Tricky / Hiatus Kaiyote / Da Lata / Derrick Carter / Derrick May / Dixon / Mark Farina / Nightmares on Wax / Bebel Gilberto / Grandmaster Flash / Norman Jay / Andy Smith (Portishead) / Andres (Slum Village) / Ron Trent / Atjazz / Joe Claussell / Tortured Soul / King Britt / Osunlade / DJ Harvey / UFO / Cut Chemist / Rainer Truby / Dr Bob Jones / Patrick Forge / Gilles Peterson / Benji B / Toshio Matsuura / Nitin Sawhney / Snowboy / Ben Watt (Everything But The Girl) / Talvin Singh / Dam-Funk / Marlena Shaw / DJ Premier / Peanut Butter Wolf / Sango + Joe Kay / Mr Carmack / Azymuth / Banda Black Rio / Bixiga 70 / Drumagik / Cinematic Orchestra / Badbadnotgood / Ethnic Heritage Ensemble / Hamiet Bluiett / Joseph Bowie / Ken Vandermark / Isotope 217

#### **D-Agency**

**Contact:** China Joenes, Head management  
[china@d-edge.com.br](mailto:china@d-edge.com.br) / [bookings@dagency.art.br](mailto:bookings@dagency.art.br)

Electronic music agency and record company, associated with D-Edge Club. In 2016, they moved away from a strict electronic focus by promoting Grace Jones' concert in a 4,000 capacity music venue.

#### **Flavio de Abreu - Scubidu Prods**

[flavio@scubidu.com.br](mailto:flavio@scubidu.com.br)  
<http://www.scubidu.com.br>

#### **Benzadeus Produtora**

<http://www.benzadeusprodutora.com.br>

#### **Nancy Silva**

[contato@benzadeusprodutora.com.br](mailto:contato@benzadeusprodutora.com.br)

#### **Pessoa Produtora (SP | Pernambuco)**

[veronica@pessoaprodutora.com.br](mailto:veronica@pessoaprodutora.com.br)  
[anapaula@pessoaprodutora.com.br](mailto:anapaula@pessoaprodutora.com.br)  
<http://www.pessoaprodutora.com.br/>

#### **Zoomcom and Natasha Arts | Rio de Janeiro**

Connie Lopes  
[connielopes@zoocom.com.br](mailto:connielopes@zoocom.com.br)

#### **Music agency and B2B Festival organizers**

<http://www.back2blackfestival.com.br>  
[back2black@zoocom.com.br](mailto:back2black@zoocom.com.br)

### 3.3. Festivals

**“Since 2013, Popload Festival has become a key event for the independent music scene in Brazil. Its intimate format and well-curated line-up provides different experiences compared to a bigger capacity festival.”**

#### **ROCK IN RIO | RIO DE JANEIRO | SOUTHEAST | SEPTEMBER 2017**

*Pop, Rock, mainstream*

Rock in Rio is one of the biggest and most well-known festivals in Brazil. Created by Roberto Medina, it was promoted by Move Concerts until last year, when Mercury Concerts took it over. The festival is held in Jacarepaguá in Rio and offers a varied programme of music. Currently, the festival is owned by the global company SFX Entertainment and does not offer too many opportunities for smaller indie bands.

#### **LOLLAPALOOZA BRASIL | SÃO PAULO**

*Pop, Rock*

LollaPalooza Brasil is the local branch of the indie festival LollaPalooza, although the line-up usually stretches beyond indie acts. For instance, the 2017 edition will feature headline performances from Metallica, The Strokes and The Weeknd. The festival is held yearly in different locations, usually large arenas. The Brazilian bands that play Lolla are big indie acts rather than emerging acts, while international

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bands are mostly booked together with other LollaPaloosa festivals around the world.

<https://www.lollapaloozabr.com/lineup/>

#### **COQUETEL MOLOTOV IN RECIFE (PE) | NORTHEAST | OCTOBER 2016**

#### **COQUETEL MOLOTOV IN BELO HORIZONTE (MG) | SOUTHEAST | OCTOBER 2016**

#### **NO AR COQUETEL MOLOTOV IN SALVADOR (BA) | NORTHEAST | JANUARY 2017**

*Genres: Indie music, indie rock. Held in several Brazilian cities, and features mainly local independent rock and pop acts.*

<http://coquetelmolotov.com.br/>

<https://www.facebook.com/NOARCM/>

#### **Programmers:**

Ana Garcia

[aninha@coquetelmolotov.com.br](mailto:aninha@coquetelmolotov.com.br)

Jarmeson de Lima

[jarmeson@coquetelmolotov.com.br](mailto:jarmeson@coquetelmolotov.com.br)

#### **ABRIL PRO ROCK | RECIFE | NORTHEAST | 7 - 30 APRIL**

*Rock/Indie Rock*

Past line-ups include international bands such as Malevolent Creation (US), Warrel Dane (US) and Evil Invaders (Belgium).

<http://www.abrilprorock.com.br/>

#### **Contact**

Paulo André

Curator

[pamp1967@hotmail.com](mailto:pamp1967@hotmail.com)

+55 81 34215380

[astronave.pe@gmail.com](mailto:astronave.pe@gmail.com)

<http://www.abrilprorock.info/>

<https://www.facebook.com/astronave.iniciativasculturais>

#### **REC-BEAT FESTIVAL | RECIFE | NORTHEAST | 25 -28 FEBRUARY 2017**

*Up-tempo music, indie rock music, world music*

The festival's programming, which today extends to debates and children's shows, attracts visitors from various regions of the country and helps local music find a platform

in foreign countries. The event itself has become part of the Ibero-American Association of Festivals.

#### **Contact:**

Antonio Gutierrez, music programmer

[gutie@recbeat.com](mailto:gutie@recbeat.com)

rec-beat produções artísticas

address: rua da aurora, 325 sl 202 - boa vista — cep 50050-000 — recife/pe

tel: +55 81 3231-3422

email: [contato@recbeat.com](mailto:contato@recbeat.com)

são paulo tel: +55 11 3812.8425

This happens in 2017 from February 25 to 28

<http://recbeatfestival.com/2016/ofestival>

#### **BANANADA GOIÂNIA | CENTRAL-WEST | 8 - 14 MAY 2016**

*Electronic, pop, indie rock*

*Acts that have been booked to play this festival include:*

*Yonatan Gat (Israel/US), Matias Cena (Chile), ALLAH-LAS (US), MASCIS (US), CADDYWHOMPUS (US), MAGALY FIELDS (Chile), KING TUFF (US), All People (EUA), Jackson Firebird (Australia), The Medics (Australia) and The Helio Sequence (US)*

<http://festivalbananada.com.br/>

#### **Contact:**

Fabrcio Nobre, Curator

[construtora.musica@gmail.com](mailto:construtora.musica@gmail.com)

#### **GOIANIA NOISE FESTIVAL (GOIÂNIA - GO) | CENTRAL-WEST**

*Rock, indie rock*

<http://goianoisefestival.com.br/2016/#programacao>

Programmer: Leo Bigode

<http://goianoisefestival.com.br/2016/#contato>

### **3.3.1. SHOWCASE OPPORTUNITIES (SMALL VENUES AND CLUBS)**

An effective way to become familiar with the Brazilian music market is via venues and clubs, where gig opportunities are more frequent, and red tape is less stifling than at festivals. Usually negotiations are held directly with the venue. Venues cannot afford to bring an artist to Brazil and pay the flights, hotel and artist fee so it is worth trying to arrange

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a few venues in different regions if the artist is already intending to make the trip.

It is not advisable to arrange shows at many venues in the same city, such as São Paulo, because the public is likely to attend one venue and not another. The venue usually pays the artists a share of the box office sales.

Below are a few contacts for producers and venues in Rio de Janeiro, São Paulo, Belo Horizonte and Porto Alegre.

SESC and the SESC circuit present a very interesting option to explore, although it is subjected to government bureaucracy.

#### **CASA DO MANCHA | SÃO PAULO**

*Indie Rock / Folk*

Casa do Mancha was established as a small studio in owner Mancha Leonel's living room. It is now considered a seminal gathering point for friends and new artists. It has become so successful that now Casa do Mancha has set up a festival called Fora da Casinha, booking independent artists. Mac deMarco and other international guests have played a jam session with friends at Casa do Mancha.

<https://www.facebook.com/casadomancha/>

##### **Contact**

Mancha Leonel, Owner and curator

[manchaleonel@gmail.com](mailto:manchaleonel@gmail.com)

+55 11 96358-7404

#### **SERRALHERIA | SÃO PAULO**

*Indie Rock / Folk, Instrumental Music, World Music*

Serralheria is a small venue/club with a forward thinking indie music programme. There is an open area with a bar and exhibition space.

[escapeserralheria@gmail.com](mailto:escapeserralheria@gmail.com)

[www.escapeserralheria.org/](http://www.escapeserralheria.org/)

240 people. capacity in the studio: 180 / door split

Marcelo Bárbara (owner)

[feijucks@gmail.com](mailto:feijucks@gmail.com)

+55 11 950555028

Hamilton Pinheiro (music programmer )

[drumachine74@gmail.com](mailto:drumachine74@gmail.com)

+5511 991225632

#### **MUNDO PENSAnte | SÃO PAULO**

*Indie Rock / Folk, Instrumental Music, Jazz, World Music*

Mundo Pensante is a venue/club that integrates music, visual arts and performing arts. It is located in the old-city neighbourhood of Bixiga in São Paulo.

The space hosts performance rehearsals, workshops and courses, art exhibitions, movie screenings, theatre events and parties. The venue also curates design, visual arts and cultural projects. They promote music festivals in other locations around the city and host big events/concerts.

[http://www.mundopensante.com.br/wp/rr\\_artists/festival-mundo-pensante/](http://www.mundopensante.com.br/wp/rr_artists/festival-mundo-pensante/)

**Contact:** Paulo Papaleo

[paulo@mundopensante.com.br](mailto:paulo@mundopensante.com.br)

<http://www.mundopensante.com.br/wp/>

F: 55 11 5082-2657

Capacity: 200

#### **BAR SECRETO | SÃO PAULO**

*Indie Rock / Folk, Electronic*

This isn't exactly a bar, despite its name, but more of a balada, or nightclub. It is located in Pinheiros, close to the FNAC bookstore. The venue is only contactable via email. The guest list is carefully managed. Madonna threw a party here in 2008, and Bono was seen on the karaoke at an aftershow party for one of U2's concerts in 2016.

<http://barsecreto.com.br/>

[infos@barsecreto.com.br](mailto:infos@barsecreto.com.br)

Rua Álvaro Anes, 97

Pinheiros, São Paulo

Fernando Tubarão

[sompuxadinho@gmail.com](mailto:sompuxadinho@gmail.com)

#### **BOURBON STREET | SÃO PAULO**

*Jazz, Soul, Funk, Instrumental Music*

This New Orleans-style bar is big with upmarket Paulistanos, who come to hear live jazz, blues, soul and Latin swing. The bar books local and international artists and also organises one of the city's biggest annual jazz festivals, the Bourbon Street Music Festival.

Edgar Radesca (owner and music programmer)

[radesca@bourbonstreet.com.br](mailto:radesca@bourbonstreet.com.br)

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#### **AUDIO CLUB | SÃO PAULO**

*All genres*

Capacity: 2,500

Programmer

Coy Freitas

coyfreitas@icloud.com

<http://www.audiosp.com.br/>

#### **D.EDGE | SÃO PAULO**

*Indie / Electronic*

D.Edge is an internationally recognised nightclub, dedicated to underground electronic music. An important stop in any DJ or electronic act's Brazilian or South American tour.

Time Out describes the space as having "top-class DJs and a powerful, crystal-clear sound system." Wednesdays and Fridays have a GLS (gay, lesbian and sympathisers) slant.

Capacity: 900 people.

#### **AUDIO REBEL | RIO DE JANEIRO**

*Independent music*

Audio Rebel is a studio that has been up and running since 2005 in the neighbourhood of Botafogo in Rio de Janeiro.

Many artists have recorded, rehearsed and performed here. There are four rooms in place, all interconnected and acoustically isolated, with an adjacent shop stocking instruments and music accessories.

<http://www.audiorebel.com.br/>

#### **CIRCO VOADOR**

Circo Voador - aka The Flying Circus - is a legendary Lapa venue where you are as likely to catch Primal Scream or Beady Eye as local samba heroes A Paredo. The palm tree-lined outdoor terrace is filled with tables and chairs and boasts a sunken dancefloor.

As well as music, there are regular workshops in Capoeira, percussion and even acrobatics, and a language school and a separate creche.

Capacity: 2,800

Area: 3,000 m<sup>2</sup>

**Contact:** Pedro Montenegro, Production

[pedro@circovoador.com.br](mailto:pedro@circovoador.com.br)

#### **A AUTÊNTICA | BELO HORIZONTE | SOUTHEAST REGION**

This venue has a stage, loft space, audience and bar space and a great sound system.

Capacity: 300 people.

**Contact:** Luciano Viana

[programacao@aautentica.com.br](mailto:programacao@aautentica.com.br)

+55 (31) 99682-5052

Website: <http://aautentica.com.br>

#### **CÉLULA SHOWCASE | FLORIANÓPOLIS | SOUTH REGION**

Situated on the island of Santa Catarina, Célula's programme includes dance, theatre, cinema and artistic interventions.

**Contact:** <https://www.facebook.com/celulacultural/>

#### **BAR OPINIÃO | PORTO ALEGRE | SOUTH REGION**

Bar Opinião is the most important showcase venue in Porto Alegre. It also holds private events, such as product launches.

**Contact:** <http://www.opinio.com.br>

Producer: +55 51 3211.2838

#### **3.3.2. City**

#### **POPLOAD FESTIVAL |**

**[HTTP://WWW.POPLOADFESTIVAL.COM](http://www.poploadfestival.com) | SOUTHEAST SÃO PAULO | OCTOBER 2016**

*Indie Rock/Folk / Electronic*

Popload Festival takes the form of many small gigs all over the city. It is an urban festival composed of small-capacity shows and secret pop-up gigs announced hours before the performance.

Since 2013, Popload Festival has become a key event for the independent music scene in Brazil. Its intimate format and well-curated line-up provides different experiences compared to a bigger capacity festival. In its third edition, Popload has already booked high calibre acts such as The XX, Iggy Pop, Tame Impala, Belle & Sebastian, Emicida, The Lumineers, Cat Power, Metronomy, Rodrigo Amarante, Marcelo Jeneci and others. In 2016 it hosted concerts by Wilco and The Libertines.

The Festival also runs an interesting community and volunteering programme, such as offering tickets in exchange for blood donations or programming exhibitions and secret free shows in public spaces around São Paulo.

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More than 20,000 people attend each edition of the festival, and a total of 2,400,000 people have attended their free concerts.

**Contact:**

Lucio Ribeiro  
Artistic Director  
sitepopload@gmail.com  
<http://www.popload.com.br/contato/>

#### **SECRET FESTIVAL | SÃO PAULO | SOUTHEAST**

*Indie rock / Pop*

Secret Festival is an intimate festival at a secret location. TOPS (Montreal, Canada) performed here in 2016.

Dilson Laguna, Artistic Director, is also a curator for Sofar Sounds and Comitê Jazz Club. He is currently interested in working with several Canadian independent artists, namely Alice Glass, Roy Wood\$, Vallens, Gulfer and Witch Prophet.

<https://www.secretfestival.com.br/>

Curator/Artistic Director:

Dilson Laguna  
dilsonlaguna@gmail.com  
São Paulo (+55) 11 96452.8384

#### **3.3.4. Multi-arts**

#### **MECA | [HTTP://MECA.LOVE/MECA-FESTIVAL](http://MECA.LOVE/MECA-FESTIVAL) SOUTHEAST | SÃO PAULO, RIO DE JANEIRO, BRUMADINHO (INHOTIM) | APRIL 2016**

*Indie Rock*

This is a multi-arts independent festival. Now in its seventh edition, the festival has booked Two Door Cinema Club, Friendly Fires, La Roux, AlunaGeorge, Vampire Weekend, Breakbot, Flight Facilities, Racionais MC's and DJ Hum.

The festival takes places in different locations throughout the country. It has been held in Rio de Janeiro, São Paulo, Porto Alegre and Maquiné, and next up will be Inhotim.

#### **PSICODÁLIA | RIO NEGRINHO - SANTA CATARINA | SOUTH BRAZIL | 24 FEB - 1 MARCH 2017**

*Indie rock / Folk and maybe some world music*

Another multi-arts independent festival, its music programme includes rock'n'roll, progressive rock, psychedelic rock, rural rock, and also styles like jazz, blues, soul, reggae and regional music.

The festival takes place during Carnival.

Psicodália features domestic and international artists. In over 10 years, the festival has held over 450 concerts, dance performances, theatre performances, circus shows and wellness retreats.

**Contact:**

Bina Zanette, curator  
santaproducao@gmail.com

#### **VIRADA CULTURAL DA CIDADE DE SÃO PAULO | SÃO PAULO | SOUTHEAST | 20-21 MAY 2017**

*Various genres*

Promoted by the municipality of São Paulo it lasts 24 hours, and offers cultural attractions for people of all ages and social classes. Inspired by the French event concept of 'nuit blanche', the event offers a wide variety of cultural activities. Since its first edition in 2005, the Virada Cultural has attracted thousands of people from all parts of São Paulo and Brazil. São Paulo Metro stays open for the full duration of the event, ensuring that getting around the city remains easy.

Any cultural project can apply to take part, with the condition that a Brazilian company is involved.

<http://www.viradacultural.prefeitura.sp.gov.br/chamamento-publico-virada-cultural-2017/>

**Contact:**

viradacultural@gmail.com  
Web: [www.viradaculturalpaulista.sp.gov.br](http://www.viradaculturalpaulista.sp.gov.br)

#### **3.3.5. Genre**

#### **JAZZ NA FÁBRICA | SESC POMPÉIA | SOUTHEAST | SÃO PAULO | AUGUST EVERY YEAR**

*Jazz, Soul, Funk*

Now in its 6th edition. In 2016, Cinematic Orchestra, BadBadNotGood (CAN) and Marcus Gilmore all performed.

[http://www.sescsp.org.br/programacao/39950\\_JAZZ+NA+FABRICA](http://www.sescsp.org.br/programacao/39950_JAZZ+NA+FABRICA)

Wagner Castro, Manager of cultural action  
(of all SESC's in São Paulo)  
Assistente - Música  
wagnercastro@sescsp.org.br  
Thiago Freire, Programmer Coordinator at Sesc Pompeia  
thiagofreire@pompeia.sescsp.org.br

#### **BRAZIL JAZZ FEST | SÃO PAULO AND RIO DE JANEIRO | SOUTHEAST | MARCH - APRIL 2016** *Jazz and instrumental music*

The festival has hosted Bobby McFerrin, Ahmad Jamal, Dave Holland, Kenny Garrett, Chris Botti, Snarky Puppy, Billy Harper Quintet, Joshua Redman Trio, Maceo Parker, The Clayton Brothers and Pat Metheny, among many others.

Zuza Homem de Melo, Zé Nogueira, Pedro Albuquerque and Monique Gardemberg (Dueto Productions) are the festival bookers.

<http://www.braziljazzfest.com.br/wpjazz/>

**Contact:** Pedro Albuquerque  
pedrinho73@gmail.com

#### **FESTIVAL MÚSICA ESTRANHA | SÃO PAULO - SP | SOUTHEAST | 24 - 26 NOV 2016**

*Genres: The program consists of concerts by local and international artists, as well as workshops and discussion panels. The programme consists of a wide range of genres, including contemporary concert music, experimental, ethnic, electroacoustic and sound installations.*

The following artists have performed at Música Estranha in the last two years: Gabriel Prokofiev (UK), Joby Burgess (UK), Ivan Illic (USA/Serbia), Marc Tritschler (Germany), Hans Beckers (Belgium), DJs Mengel & Berg (Holland), Abraxas (US), Flat Earth Society (Belgium), Los Pirañas (Colombia), Hubbub (France), LXMP (Poland) and Tatsuya (Japan), among others.

<http://www.musicaestranha.me/>

ÁguaForte Produções

Artistic Director/Curator: Thiago Cury

Email: thiagocury@aguaforte.org

Tel: +55 11 3258 0615

Tell: 98101-3111

### 3.4. Touring structure

**“...acts that can expense their travel costs to their own countries, through export agencies, local embassies, Consulates or Cultural Institutions, have a much better chance of touring Brazil.”**

Most venues have their own lighting, sound and stage set up. Depending on the technical needs of the artists, the venue will rent any specific bit of technical equipment if required. Venues tend to have their own in-house sound technician, too.

### 3.5. Fees & Logistics

Festivals and venues in Brazil either agree on a fixed fee or split the proceeds at the door. Promoters usually prefer working with bands that can cover their own travelling fees. Some larger festivals do agree to pay a fixed fee including all logistics for international bands.

Getting around in Brazil can be a challenge. The country is very large and public transport lacks infrastructure and investment. There aren't many cheaper alternatives to air travel, and Brazil has an almost non-existent public railway system.

It can take days travelling city to city by car. Distances are considerable and roads can be in various states of disrepair.

The main airline companies in Brazil today are LATAM, GOL, Azul and Avianca.

Due to the distances, air travel is the most recommended, but costs are still considered high and tickets are expensive unless booked far enough in advance.

## 4. PUBLISHING MARKET

### 4.1. Collecting societies

**“The collecting societies’ practices in Brazil are complex and bureaucratic. Historically, the sector has had several organisations competing for collection rights and representing the different intellectual property sectors.”**

The collecting societies’ practices in Brazil are complex and bureaucratic. Historically, the sector has had several organisations competing for collection rights and representing the different intellectual property sectors. A solution implemented by the Brazilian government was to integrate state-owned institutions and private organisations. This would ensure that IP law is correctly enforced and stakeholders can exercise their rights, as well as streamlining the process of collecting royalties and other fees.

The central organisation in charge of this administration is ECAD (Escritório Central de Arrecadação e Distribuição). ECAD collects royalties for performance, mechanical and neighbouring rights, which are later distributed to the members of the societies it represents. However, the lack of transparency in distribution of revenues by ECAD was the subject of an investigation led by the Legislative Assembly of Sao Paulo. A reform of the copyright law has been in development since 2010 to bring it line with the digital market. However, no relevant policy changes have been made so far.

The member organisations for musicians, composers, arrangers, music writers and authors under ECAD are: ABRAMUS, AMAR, SBACEM, SICAM, SOCINPRO, UBC, ABRAC, ANACIM, ASSIM and SADEMBRA. As of 2011, SOCAN had unilateral agreements with ABRAMUS, AMAR, ASSIM, SADEMBRA, SBACEM, SICAM and SOCINPRO.

### 4.2. Sync Opportunities for English catalogues

The UBEM (Brazilian Union Organisation of Authoring Rights) website lists all of the publishing companies it works with.

#### **Punks S/A**

In association with Jingle Punks New York, the company offers one of the biggest catalogues in the world, with both

Brazilian and International music.

<http://www.punkssa.com/>

Owner/contact: Arthur Abrami

[info@punkssa.com](mailto:info@punkssa.com)

#### **Elemess**

Elemess is an artistic business management company, offering specialised services for the music industry and promoting business between sectors. Elemess was founded by Lua Nova, one of the leading audio production companies working in advertising. They are the exclusive Kobalt representative in Brazil for sync/licensing music in advertising.

[www.elemess.com.br](http://www.elemess.com.br)

**Contact:** Endrigo Thiago, Manager / A&R Director

[teja@elemess.com.br](mailto:teja@elemess.com.br)

#### **Irmãos Vitale**

Established in 1923, the Vitale publishing house owns more than 20,000 musical works, representing a total of 9,000 authors and heirs. In addition to registering and promoting musical works and editing scores, the publisher has just inaugurated a department specifically dedicated to synchronization, offering a music consultancy service for audio visual productions.

The company represents several Brazilian and international publishers/labels, including production music/library banks. The Kinks, Suicide, Goldfrapp, Moby, Donovan, Nick Cave, Johnny Cash, Roy Orbison, Jerry Lee Lewis and Depeche Mode are all represented by Vitale.

[www.vitale.com.br](http://www.vitale.com.br)

**Contact:** Stefano Vaccarino, Repertoire manager

[repertorio@vitale.com.br](mailto:repertorio@vitale.com.br)

## 5. SECONDARY MARKET

### 5.1. Gaming

Gaming in Brazil is extremely popular, with an estimated number of 34 million consistent users. This market is increasingly growing in Brazil, reaching revenues of US\$ 1.5bn in 2015, a 23% growth compared to 2014. Most Brazilian gamers play on smartphones (82%), but Sony's PS2 remains one of the best selling consoles in Brazil because of its affordable price.

Youtubers are the most notable gaming influencers in Brazil, with 5 gaming channels among the top 20 Brazilian Youtube channels. These 5 channels have amassed over 28.5 million subscribers as of July 2016, which gives an idea of the power and influence they have over the market's taste.

However, opportunities for new music in the gaming sector are limited. Most gaming companies present in Brazil are foreign corporations (mainly from the US), which source their music abroad. In the exceptional case of a domestic gaming company looking for music, local composers are hired to write original soundtracks.

### 5.2. Merchandise

**“Local production of merchandise often translates to high price tags, which is why touring artists usually import their merchandise from abroad. Many small to medium bands bring their merch in suitcases to avoid the high import taxes.”**

The selling of artist merchandise tends to happen at concerts, rather than through online or physical retailers. Brazilian fans buy merchandise on the day of the show, and it is common to find pirate merch vendors outside the venue. Local production of merchandise often translates to high price tags, which is why touring artists usually import their merchandise from abroad. Many small to medium bands bring their merch in suitcases to avoid the high import taxes.

Whilst revenue from CDs is declining across the spectrum, indie music fans do purchase vinyl at concerts, but they would not pay over US\$ 20-30 for an album. Brazilians

like buying customised drinking glasses with the band or artist's logo printed on them. These are usually sold with beer at the concert as a promotional offer.

### 5.3. Brand engagement

It is common to have many different partners, producers and promoters involved in the production of live shows and tours. Because of the economic challenges found in the Brazilian music industry, sponsors are crucial to a successful tour. These are typically breweries, food brands, telecom and fashion companies.

iMusica (distribution), Elemess (advertisement/sync), and Laboratório Fantasma (360° services for hip hop artists) all offer brand integration services.

**“Because of the economic challenges found in the Brazilian music industry, sponsors are crucial to a successful tour. These are typically breweries, food brands, telecom and fashion companies.”**

### 5.4. Other players

**“SESC São Paulo is often referred to as the unofficial “Ministry of Culture”. The institution produces cultural activities such as concerts, exhibitions, theatre and dance performances, film screenings, workshops, talks on art and cultural policies and provides funding for other projects.”**

#### SESC - Serviço Social do Comércio

SESC is the leading institution in arts financing. It operates throughout Brazil and develops projects on education, health, leisure, culture and medical care areas. Its revenues stem from a percentage of the payroll tax on commerce workers. Present in all Brazilian states, it reaches 2,200 cities through fixed facilities or mobile units, seeking to promote local as well as international productions and encouraging a diverse cultural programme. It routinely broadcasts through its TV station (SESC TV), a web portal (SESC SP), a publishing house (Edições SESC SP), a record label that produces DVDs and CDs (Selo SESC) and a



research and training centre.

While promoting culture and art throughout the country, it is in São Paulo where they have the strongest presence: SESC São Paulo is often referred to as the unofficial “Ministry of Culture”. The institution produces cultural activities such as concerts, exhibitions, theatre and dance performances, film screenings, workshops, talks on art and cultural policies and provides funding for other projects.

Wagner Castro, Manager of Cultural Action  
(of all SESCs in São Paulo) Assistente - Música  
wagnercastro@sescsp.org.br  
Tel: + 55 11 2607-8673

### 5.5. Publishing for recorded music

One of the largest publishing companies of international catalogues is Basement Brazil. The company was founded in 2004 and is based in Sao Paulo, Brazil. As of May 31, 2016, Basement Brazil Editora Musical Ltda. operates as a subsidiary of BMG Entertainment, Inc.

**Contact:** John Tefler, Founder  
john@basementbrazil.net

## 6. MEDIA AND PR

### 6.1. How the PR market works

Brazilian media is controlled by a small number of powerful companies catering to the needs of their advertisers and the tastes of the general public.

**“Radio operates a ‘pay for play’ basis (with receipts and invoices), which means that major labels dominate airplay.”**

Radio operates a ‘pay for play’ basis (with receipts and invoices), which means that major labels dominate airplay. Radio stations negotiate directly with labels, agents and distribution companies. As always in Brazil, personal connections go a long way in establishing good relationships. Investing in social media and blogging can also be an effective strategy, since more than 139 million Brazilians were online in 2016.

It is important to hire a local English-speaking PR professional to take care of this side of the strategy. An alternative to traditional press releases is to give news first hand to an influential column or journalist of a chosen newspaper before sending the press release to all media. After the piece has been placed, the press release can then be forwarded to all media to guarantee more coverage. This has a good probability of success, since Brazilian media is constantly competing to have the best, the first or the most complete news.

It is also advisable to liaise with all concerning venues, festivals and concert halls who have PR firms on retainers and can help in spreading news faster and more effectively.

A smaller tour package may cost something between \$415 to 830 CAD, which is negotiable and dependent on workload and the other usual factors. At that price, the artist is expected to brainstorm and motivate the press agency as much as possible.

### 6.2. Media and PR opportunities for Canadian content

#### PRESS

- Folha de SP has a cultural section (Ilustrada - daily) and a cultural guide (Guia da Folha — weekly), often featuring international artists’ concerts: <http://guia.folha.uol.com.br/>

- O Estado de SP: Cultural Section (Caderno 2 - daily) and a cultural guide: [Divirta-se: http://cultura.estadao.com.br/blogs/divirta-se/](http://cultura.estadao.com.br/blogs/divirta-se/)
- O Globo: <http://oglobo.globo.com/cultura/>

#### MAGAZINES

When approaching magazines for press, it is important to allow around a month and half of lead time. In the case of weekly magazines, around one or two weeks before the date should be sufficient.

*Revista Veja*: <http://veja.abril.com.br/>

*Revista Serafina*: <http://www1.folha.uol.com.br/serafina/2016/12/>

#### WEBSITES

**Vice, Noisy**: [https://noisy.vice.com/pt\\_br](https://noisy.vice.com/pt_br)

**Trabalho Sujo**: <http://trabalhosujo.com.br>

**MonkeyBuzz** (operating under MTV): <http://www.monkeybuzz.com.br>

**NOIZE**: <http://www.noize.com.br>

**dAdA radio**: <http://dadaradio.net>

**RockNBeats**: <http://www.facebook.com/rocknbeatssp/>

**Collector’s Room**: [www.collectorsroom.com.br](http://www.collectorsroom.com.br)

**Fita Bruta**: <http://fitabruta.com.br>

**Na Mira do Groove**: <http://namiradogroove.com.br>

#### TV

**TV Cultura**: Metr polis (<http://tvcultura.com.br/programas/metrpolis>) and Cultura Livre (<http://tvcultura.com.br/programas/culturalivre>).

**Arte 1**: <http://arte1.band.uol.com.br>

**Canal Bis**: <http://canalbis.globo.com>

### 6.3. Key media and PR contacts

All the journalists listed below are very influential in each specific niche they specialise in.

#### MEDIA

TALES MENEZES | SPECIAL REPORTER FOR FOLHA DE SP  
*Indie, Rock, Pop*  
[thales.menezes@grupofolha.com.br](mailto:thales.menezes@grupofolha.com.br)

LUCIO RIBEIRO | POPLOAD  
*Indie, Rock, Pop*  
[sitepopload@gmail.com](mailto:sitepopload@gmail.com)

Owner of Popload festival and staff writer at Popload (one of the biggest indie/rock blogs in Brazil). He often “discovers” the next hot band, and his endorsements generate considerable hype. Popload festival is one of the most famous indie festivals in Brazil and regularly books international bands.

JULIO MARIA (SP) | JULIO.MARIA@ESTADAO.COM  
*Jazz, Instrumental music, Soul*  
Email: [calado@uol.com.br](mailto:calado@uol.com.br)  
Carlos Calado (Journalist and critic of O Valor, Folha SP and Blog Música de Alma Negra)

IVAN FINOTTI | SÃO PAULO BASED | EDITOR AT FOLHA DE SÃO PAULO  
*Indie Rock, Pop, Jazz, Instrumental music, Soul*  
<http://www1.folha.uol.com.br/colunas/ivanfinotti/>  
Journalist, writer, and producer, Ivan is the editor of Ilustrada in Folha de S. Paulo, the biggest newspaper in Brazil. He writes about new music and culture.

CARLOS MESSIAS | REVISTA SERAFINA | FOLHA DE S. PAULO |  
*Indie Rock, Indie pop*  
Contact not available.

MAURO FERREIRA | RIO DE JANEIRO BASED |  
*Rock, Indie Rock, Pop, Indie Pop*  
<http://cultura.estadao.com.br/blogs/alt/mauroferreira2016@globo.com>

BERNARDO ARAÚJO (O GLOBO) | RIO DE JANEIRO  
[bbaraujo@oglobo.com.br](mailto:bbaraujo@oglobo.com.br)

RENATO VIEIRA | ESTADO DE SP |  
[renato.vieira@estadao.com](mailto:renato.vieira@estadao.com) | 11 3856 5958

PEDRO ANTUNES | ESTADO DE SP |  
[pedro.antunes@estadao.com](mailto:pedro.antunes@estadao.com)

MARCOS MACIEL - TV CULTURA / PROGRAMA METRÓPOLIS | SÃO PAULO BASED  
[mmlitran@gmail.com](mailto:mmlitran@gmail.com)  
[pautametro@tvcultura.com.br](http://pautametro@tvcultura.com.br)

Alexandre Matias | São Paulo based  
[trabalhosujo.com.br/](http://trabalhosujo.com.br/)

CLAUDIA ASSEF - JOURNALIST AND DJ |  
[claudia@musicnonstop.com.br](mailto:claudia@musicnonstop.com.br)  
Author of the only book ever written on the history of Brazil's DJ and electronic music scene (Todo DJ Já Sambou – A História do Disc-jóquei no Brasil), Claudia is a journalist and DJ. As a journalist, she currently writes special features for Brazilian DJ Mag, House Mag, maintains the blog Todo DJ Já Sambou and is the editor of Virgula, Brazil's biggest portal dedicated to youth culture.

Claudia has many radio shows including the webshow Todo Mundo É DJ, dedicated to exclusive interviews with DJs from all over the world. On Todo Mundo É DJ she has interviewed DJs such as QBert, Krafty Kuts, DJ Jazzy Jeff, DJ Marky, Nuts, Anderson Noise, Mau Mau and many others.

SERGIO MARTINS | VEJA SP |  
[smartins@abril.com.br](mailto:smartins@abril.com.br)  
*Indie Rock, Pop, Jazz*

JOTABE MEDEIROS | UOL |  
[jotabe.medeiros@grupoestado.com.br](mailto:jotabe.medeiros@grupoestado.com.br)  
*Jazz, Soul, Funk, Pop, Indie Rock*

**PR**  
NAMÍDIA  
[www.namidiacom.com.br](http://www.namidiacom.com.br)  
[mercedes@namidiacom.com.br](mailto:mercedes@namidiacom.com.br)

PERFEXX  
[www.perfexx.com.br](http://www.perfexx.com.br)  
[contato@perfexx.com.br](mailto:contato@perfexx.com.br)

MIKI MALKA  
[www.mikimalka.com.br](http://www.mikimalka.com.br)  
[daniela@mikimalka.com.br](mailto:daniela@mikimalka.com.br)

BINÔMIO  
<http://binomiocomunicacao.com>  
[binomio.imprensa@gmail.com](mailto:binomio.imprensa@gmail.com)

AGÊNCIA LEMA+  
<http://www.agencialema.com.br/>  
[lema@agencialema.com.br](mailto:lema@agencialema.com.br)

FERNANDA COUTO - SETE OITO COMUNICAÇÃO  
[fecouto78@gmail.com](mailto:fecouto78@gmail.com)

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[fabiana@inker.com.br](mailto:fabiana@inker.com.br)

BEBEL PRATES  
[bebelprates@uol.com.br](mailto:bebelprates@uol.com.br)

# 7. VISA SYSTEM, TAX WITHHOLDING POLICY AND OTHER PRACTICAL INFORMATION

Every foreign artist performing a paid job in Brazil must apply for an appropriate work visa. The visa for artists is called Temporary III, which can be granted for a period of up to 90 days and renewed for another 90. The work permit falls under the jurisdiction of the The Ministry of Labor and Employment (MTE - Ministério do Trabalho e Emprego). Once approved, the work permit is sent to the country's Brazilian consulate, which issues the visa.

To obtain the visa, the applicant must pay a consular fee, an amount that varies according to the artist's nationality and the Brazilian consulate in question.

In Brazil, the company booking the artist is obliged to collect ten percent of the artist's fee, based on a contract authorized by MTE and in accordance with the Brazilian law. This is due to the OMB (Ordem dos Músicos do Brasil) and the Sindicato dos Músicos (Musicians Union) (Law 3857/60). As this is an administrative procedure, it is advisable (but not mandatory) that the production agency hire legal help to help cover this and other contingencies, such as hidden extra charges by the OMB or the unions, problems at the Brazilian border, robbery or theft, force majeure that prevents the completion of the show and many other issues involving artists and local production.

The ideally estimated time to apply for the visa is around 45 days. All the bureaucracy prior to coming to perform in Brazil is complex and can take some time to be approved (i.e. work permit, visa delivery by the consulate and the journey itself).

**“...it is advisable (but not mandatory) that the production agency hire legal help to help cover this and other contingencies, such as hidden extra charges by the OMB or the unions, problems at the Brazilian border, robbery or theft, force majeure that prevents the completion of the show and many other issues involving artists and local production.”**

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\*Please note: The researcher has carried out research mainly from primary sources for this report. This original research has been combined with general information from previous Brazilian market reports that Sound Diplomacy commissioned the researcher to do.

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Opportunities for Canadian Independent Music Companies in the  
Chilean Music Market

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Researcher: *IMiChile*

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# 1. OVERVIEW

The present document is an analysis of the main trends that characterize the contemporary development of the music industry in Chile. The information presented was obtained from several public and private secondary sources, seeking to portray the main dimensions of development of the industry at the local level. The report was prepared by a research team led by researcher Simón Palominos, based on definitions, recommendations and advances developed by Chilean Music Industry - IMI Chile.

**“17% of the publishing sector revolves around indie netlabels (labels with exclusively digital content and content available for free download) and 43% from standard independent labels offering repertoires for sale in both physical and digital formats. This means most of the current Chilean music publishing sector (60%) is concentrated in this indie sector.”**

## 1.1 Market size and Dynamics

Over the last decade, Chilean record production has undergone great changes. The large-scale record industry represented by the local subsidiaries of transnational companies (majors) maintained an important participation in the repertoires of Chilean music published year-by-year, at least until the end of the 1990s. Six of these record labels monopolized the absolute majority of sales: EMI, Sony, Warner, Universal, BMG and PolyGram. Today, these have been consolidated to three global conglomerates: Sony, Warner and Universal.

Until four years ago, these labels only represented 5% of all annual productions of new Chilean music. During 2012, this would be limited to four reissues from EMI, one Warner phonogram, two from Universal and eight (of varying genres) from Sony Music, in addition to the participation of the labels Discos CNR and Leader Music, respectively of Dutch and Argentinian origins.

The independent record companies had to face up to this scenario, and therefore took control of the Chilean market. These latter indie labels are characterized by

autonomous management and the ability, in the most advanced cases, to establish effective alliances with various market players (state funds, brand sponsorships, deals with foreign producers, alliances with international independent labels, presence on global digital platforms, etc.) in order to develop their catalogues. 17% of the publishing sector revolves around indie netlabels (labels with exclusively digital content and content available for free download) and 43% from standard independent labels offering repertoires for sale in both physical and digital formats. This means most of the current Chilean music publishing sector (60%) is concentrated in this indie sector. These labels represent a wide variety of repertoires, from folk music, world music and “cantautores” to more niche variants and underground movements such as rap, electronic, experimental music, hardcore, metal and progressive rock, among others.

In addition to the staggering percentage of music affiliated with independent labels, a contingent of self-published creators has risen. The creators, who represent 27% of the country’s record production, are sometimes referred to as ‘musicians without labels’, their work referred to as ‘particular productions’ or ‘self-editions’. It is estimated that 87% of the music published in Chile is edited outside of the corporate music industry. Other, more recent, studies increase this percentage to 99.5%.

The importance of independent labels in Chile has changed the characteristics of the market, moving to a model called 360°, in which the various tasks of the production chain (from creation and production to publishing, booking and management) are overseen by a single entity.

In terms of physical sales revenue, figures have remained constant during the last three years: CLP \$ 8,208,947,000 (US\$ 12,400,327) in 2012; CLP \$ 8,325,178,000 (US\$ 12,575,904) in 2013 and CLP \$ 8,162,704,000 (US\$ 12,330,473) in 2014. In terms of units sold by genre, Anglo music stands out first (44.6%), followed by Latin music (37%) and local bands take third place (17.1%) .

Nonetheless, during 2014, there was a sharp fall in the number of physical units sold. This could be explained by the breakthrough in the digital sales market, which accounted for 60.23% of total sales during that year. This

represents a 1600% increase in digital sales over the last 5 years.

As for the Chilean Copyright Society (SCD), its records show that the annual collection amount has increased gradually but significantly between 2009 and 2014, with a positive variation of 46.2% during that period. During 2014, this organization raised a total of US\$ 22,439,767, of which 39.4% originated from permanent users, 23.2% from cable TV, 14.1% from sporadic users, 6.4% from radio and 3.6% from cinema.

Revenue from concerts and/or music festivals in recent years has amounted to about US\$ 125,000,000, with between 600 and 750 thousand tickets sold annually in the country.

Regarding the international market, the music sector's imports in 2011 amounted to US\$ 108,776,134, with a considerable emphasis on input for music creation (94.2%) over equipment for production (3.5%) and finished products (2.3%) (INE, 2014). China is the main supplier of musical goods to Chile. Their imports represent 68.72% of the total imported goods in this sector (IMI, 2016).

Exports from the music sector increased to US\$ 35,870,128 in 2011. Of these, 97.7% corresponded to inputs for creation, 1.6% to finished products and 0.7% to reproductive apparatus. The United States is the main destination for Chile's musical goods and services (32.59%), followed by Peru with 27.43%. Thus, North America is the continent with the greatest reception of exports from Chile in the musical field. Meanwhile, Prochile, a government agency for the promotion of productive exports of the country, has implemented for the first time the "Sectorial Plan for Music", a program aimed at boosting musical exports in Chile, thus integrating the country into the international market.

"The music sector is the one that has experienced the greatest growth in the period evaluated [when compared to the audiovisual, publishing and design sectors]. This is mainly due to the marked increase that the sector underwent between 2012 and 2013. " In total, the number of companies in the sector grew by 536% between 2005 and 2013. According to figures from the Servicio de Impuestos Internos (Internal Taxes Service), the number

of labels increased by 96% during the period between 2012 and 2015. Among dependent workers, the music area has the lowest average remuneration of the creative sector at US\$ 596,768.

Finally, it should be added that the independent music industry in Chile, despite being in a healthy state of growth, has only recently seen development and integration into the international market. This implies that the official data on this subject is scarce and poorly systematized. There are only a few variables that have had continuity.

### 1.2. How to Navigate the Marketplace

In Chile, the music industry has been experiencing tremendous growth since 2005, but particularly since 2012. Indeed, between 2005 and 2013, the total number of companies in the sector grew by 536%; sales grew by 460% and the number of dependent workers increased by 436%. Likewise, among the creative industries, music saw the greatest increase in profitability, from US\$ 346,187 in 2005 to US\$ 27,663,226 in 2013, which translates to a 377% growth.

According to figures released by the Consejo de Fomento de la Música (Council for the Promotion of Music) in 2013, the annual production of compact discs rose to 1,017 copies, an increase of 58.4% compared to 2012.

The two main supports for record production are the compact disc (CD), which maintains a 28% share in the overall market, along with mixed phonograms, digital and CD, which hold the same percentage. This corresponds to a considerable number of interpreters who choose this mixed option, making their music both freely available (on the Internet) and for sale (on CDs). This trend goes along with the increasing amount of music available for download from the internet.

Finally, we notice an incipient but striking rise of vinyl sales, mainly corresponding to those of independent record labels linked to rock or electronic music. Therefore, the labels usually offer this format in combination with a downloadable digital version as well as a compact disc version, such as in the case of the label Quemascabeza.

As for the format in which the population usually consumes

music, radio stations stand out with a 71% sector share. CDs and DVDs hold a 44.4% share, and digital files are preferred by 38.3%. The primary ways of obtaining recorded music among Chileans are: Internet download (40%); buying music on the street (29.1%); music obtained as a gift (22.6%), and purchased in music stores (21.1%). In relation to the above, it is important to stress the fact that, as the consumers' socioeconomic level increases, so does their tendency to download music free over the Internet.

### 1.3. Trade Conferences and Industry Gatherings

The conferences and industry meetings in Chile are relatively new, although there were some previous attempts. Pulsar Fair, which is celebrating its seventh edition this year, was the only meeting of music at a national level for several years. Pulsar operates in an 'expo' format, with stands of musical instruments and products as well as music services such as schools and universities. Today, as far as professional industry meetings are concerned, Imesur and Fluvial are rising events, but this is still a growing sector.

**“Feria Pulsar is considered the annual meeting of the Chilean music industry. For three days, the national music community meets to participate in dozens of concerts, conferences, masterclasses and more than 100 exhibitions from different sectors of the music market.”**

**IMESUR** is both a market and Latin American music festival aimed at the development of the music industry both nationally and internationally. It is based on academic education, network building and management structures, derived in the circulation and constant flow of musical expressions between the participating countries.

**Fluvial Música & Ciudad (Fluvial Music & City)** is held in the city of Valdivia. It offers an artistic showcase and a unique space of reflection to the national and international music industry, inviting artists, festival curators, labels, managers, bookers and press agents, among others. Its main objective is to trigger debates around the industry, its sustainability and its contribution to the configuration of cities and their cultural landscapes.

Fluvial's program is implemented in different public spaces

and areas of the city. It is divided into two great content fields: conferences and the festival. From talks, meetings, interventions and concerts, the music and river-urban landscape of the historic Chilean city all add up to a unique cultural experience, encouraging reflection, the exchange of ideas and entertainment.

**Feria Pulsar** is considered the annual meeting of the Chilean music industry. For three days, the national music community meets to participate in dozens of concerts, conferences, masterclasses and more than 100 exhibitions from different sectors of the music market. Feria Pulsar (translated to Pulsar Fair) has established itself as the largest platform for the development, discussion and analysis of the Chilean music industry, catalyzing new projects and national and international links.

**Nodo IMICHILE** aims to develop the Chilean music industry by promoting its professionalization and internationalization and supporting its production, promotion and commercialization. They seek to benefit the participating companies, as well as the music industry and its consumers, through the creation of workshops open to the public which reinforce different areas of industry, such as administration, accounting and communication.

**Premios Pulsar (the Pulsar Awards)** seek to recognize the best creations of the year in all musical genres. Other artistic manifestations linked to music are also awarded, thus expanding its scope to different forms and platforms for the dissemination of music. Various actors of the local musical circuit, called upon by the Sociedad Chilena del Derecho de Autor (Chilean Society of Copyright), participate in its conception, development and realization. They are the sole awards of the Chilean music industry.

**Amplifica**, organized by the Council of Culture and Arts of Chile, was one of the first spaces for 'Thinking & Speaking' about music, with rapporteurs of high international and local industry standings. After four versions (2011, 2013, 2014 and 2015), Amplifica was cancelled in order to fund other local conferences.

## 2. RECORDED MARKET

### 2.1 Sales

As already mentioned, the Chilean music sector has experienced a great amount of growth in recent years, with a significant increase in both sales and the profitability of the various companies in the sector. However, as can be seen on the graph below, there was a drop in the number of physical units sold during 2014, as well as a significant increase in digital sales.

On this last element, it is necessary to mention that PortalDisc is the main portal for music downloads in Chile. In 2014, the platform recorded a total of 25,081 downloaded albums, most of them in Chile (92.4%), while 7.6% were downloaded abroad.

**“...PortalDisc is the main portal for music downloads in Chile. In 2014, the platform recorded a total of 25,081 downloaded albums...”**

Additionally, during the period between 2009 and 2014, there was a 77.1% fall in cassette sales (which hold 0.2% of the total market) and a 55% fall in DVD sales. The latter could be explained by an increase in demand for Blu-Ray, whose sales increased by 500% during the same period.

It is also important to consider that 12% of record productions have been released by their authors and interpreters for free or as free Internet downloads, either informally or through the use of licenses such as Creative Commons.

As mentioned previously, revenue for concert and music recital attendance has been around US\$ 125,000,000, with between 600 and 750 thousand tickets sold per year. The Third Survey of Consumption and Cultural Participation reveals that 25.8% of respondents attended a concert in the 12 months preceding the survey, 70.3% did not and 3.9% acknowledged that they had never attended a concert. It should be noted that, of those who did attend a concert, only 21.2% went to see an international singer or band. Additionally, of this same group, 40.9% said they are willing to pay a little more to attend these kinds of events.

Although there is no data that distinguishes live shows by genre, in Chile, Anglo-oriented music (rock, indie, pop and folk, among others) has a great market penetration.

According to information provided by Altafonte, pop, rock and folk account for 54% of the music played on all platforms. In this regard, international festivals represent one of the main exhibition opportunities for English-speaking foreign artists. These festivals target audiences between 15 and 35 years of age from upper and upper middle class backgrounds.

### 2.2 Retail

Currently, there are no Chilean chain retail stores specialized in the sale of music. Its last and great exponent was FERIA Mix, which, due to increasing debts (since 2008) and the increase in downloads from the internet, went bankrupt. On January 28, 2014, it announced the definitive closure of its premises.

Nevertheless, in the last few years, specialized music stores selling CD, cassette and vinyl formats have reappeared, with the trends of the underground movement. Vinyl, especially, has seen a great boom since 2010. Despite this, these stores are small businesses, and there is currently no chain of stores as such, meaning independent labels have assumed the role of distributors.

On the other hand, there are no digital stores dedicated exclusively to the sale and distribution of physical discs. However, there are some cases where these small localities also have their catalogue available online for national distribution, such as La Tienda Nacional or Needle. This is because, due to the inexistence of a national record store chain and the local shops concentrating in Santiago, music in physical formats is not easily accessible for the whole country. PortalDisc, the main Chilean music download channel, is a good example of a service which also offers physical distribution for the whole country.

Stores that do not only sell records, such as supermarkets, are mainly focused on the sale of “classic” discs, which have a target audience of 50 years of age and older. The production and distribution of these discs is mainly carried out by the companies Multimúsica and CNR.

The larger stores target mass market audiences, so their focus is on popular music and mainstream tastes such as Latin American folklore, Latin pop, ballad, classics and hits. Therefore, the most favorable spots for selling Canadian independent music are through the circuit of small boutique

## 2. RECORDED MARKET *Opportunities for Canadian Independent Music Companies in the Chilean Music Market*

shops, which cater to music lovers which are young and open to discovering new artists.

### 2.3 Mobile

There is no data regarding telephone companies that have specialized services or services focused on musical content, as this service is very recent in the country. The four main mobile companies in Chile are Claro, Entel, Movistar and WOM, all of whom have been investing very little time on this matter. It was only this year that some companies opened their own music portals, such as Claro Music and Movistar

Music. Entel incorporated unlimited access to Spotify, and WOM, after an agreement with TIDAL, is the first company to launch a multimedia content application in Chile.

### 2.4 Streaming

In Chile, both the free and premium streaming models have been recently been incorporated. In 2014, 83% of the albums released in Chile were broadcast and marketed via streaming. Currently, the main players in this area are Apple Music, Spotify, Google Play Music, Tidal, Napster and Deezer. The main stats and characteristics for the Chilean versions of the platforms are as follows:

	APPLE MUSIC	SPOTIFY	GOOGLE PLAY MUSIC	TIDAL	NAPSTER	DEEZER
<b>PRICE PER MONTH</b>	USD \$4.99	USD \$4.61	USD \$5.02	USD \$4.61 (Premium) USD \$9.22 (Hi Fi) USD \$9.22 (Hi Fi)	USD \$5.34	USD \$5.34
<b>FAMILY PLAN</b>	USD \$7.99 (6 people)	USD \$6.92 (6 people)	n/a	USD \$6.92 (Premium) USD \$13.83 (Hi Fi)	n/a	n/a
<b>FREE</b>	3-month trial and Radio Beats 1	Free option on mobile phones and computers, with ads and radios	Digital locker (you can upload music from your computer to listen to it on other devices)	30-day trial	7-day trial	Unlimited music on computers and tablets. Radio only on mobile phones
<b>CATALOG</b>	Over 30 million songs	Over 30 million songs	Over 35 million songs	Over 32 million songs	40 million songs	Over 35 million songs
<b>OS</b>	iOS, Android, Windows, Mac OS X, and Apple TV	iOS, Android, Windows, Mac OS X, Playstation, web player	Android, iOS, web player	iOS, Android, Windows, Mac OS X, Smart speakers	iOS, Android, Windows Phone	iOS, Android, Windows Phone, Blackberry, Windows, Mac, web player
<b>OFFLINE OPTION</b>	Yes	Yes	Yes	Yes	Yes	Yes
<b>RADIO</b>	Thematic stations and Beats 1	Yes	Yes	Yes	Yes	Yes
<b>EXTRA</b>	Connect and recommendations based on taste	Podcasts, videos from content partners, running sync, lyrics (on computers)	Integration of Songza to create playlists, radios, and podcasts	Exclusive content, live concerts, high res music	Kids, Car Mode	Podcasts, lyrics

Table 1: The music streaming market in Chile. Source: EMOL (2016)

## 2. RECORDED MARKET *Opportunities for Canadian Independent Music Companies in the Chilean Music Market*

As for the most popular music genres, according to data provided by Altafonte and its users on all platforms, the distribution, or percentage of use, is as follows:

### PERCENTAGE OF USE

GENRE	2012	2013	2014	2015	2016
Latin	10,34	39,26	31,25	14,05	10,46
Pop	45,03	21,97	27,01	42,90	41,87
World	6,11	5,92	6,36	7,16	3,95
Salsa y Tropical	4,76	4,87	5,57	6,00	9,72
Folk	7,79	3,52	3,67	2,80	2,64
Rock	8,29	4,66	6,59	7,41	7,31
Singer/Songwriter	4,33	1,50	1,51	1,53	0,94
Children's	7,36	8,39	3,15	0,01	0,01
Alternative	0,09	5,84	3,15	2,75	3,56
Hip-Hop/Rap	4,39	1,91	4,70	5,37	6,88
Baladas y Boleros	0,14	1,33	0,77	0,80	0,42
Holiday	0,15	0,12	0,09	0,07	0,00
Reggae	0,16	0,08	0,43	0,30	0,32
Jazz	0,04	0,01	0,02	0,02	0,02
Classical	0,39	0,14	0,11	0,10	0,06
Electronic	0,07	0,03	0,08	0,12	0,34
Vocal/Nostalgia	0,00	0,17	0,21	0,14	0,17
Soul	0,56	0,20	0,33	0,24	0,17
Alternative Rock	0,00	0,00	0,01	0,74	0,84
Alternativo & Rock Latini	0,00	0,05	0,32	3,50	4,31
Pop Latino	0,00	0,01	2,81	0,70	0,61
Blues	0,00	0,00	0,00	0,00	0,00
Opera	0,00	0,00	0,00	0,00	0,00
Latin Jazz	0,00	0,00	0,00	0,00	0,00
Contemporary Latin	0,00	0,00	1,14	1,18	1,19
Punk	0,00	0,00	0,72	0,91	0,73
Instrumental	0,00	0,00	0,00	0,03	0,04
Experimental	0,00	0,00	0,00	0,08	0,08
Metal	0,00	0,00	0,00	0,02	0,01
Reggaeton y Hip-Hop	0,00	0,00	0,00	1,06	3,34
Regional Mexicano	0,00	0,00	0,00	0,01	0,01
Raíces	0,00	0,00	0,00	0,00	0,00
R&B	0,00	0,00	0,00	0,00	0,00
Dance	0,00	0,00	0,00	0,00	0,01
Indie Dance	0,00	0,00	0,00	0,00	0,00
House	0,00	0,00	0,00	0,00	0,00
Spoken Word	0,00	0,00	0,00	0,00	0,00
Brazilian	0,00	0,00	0,00	0,00	0,00
<b>TOTAL</b>	<b>100,00</b>	<b>100,00</b>	<b>100,00</b>	<b>100,00</b>	<b>100,00</b>

Figure 1: Percentage of distributed music by genre, 2012-2016. Source: Altafonte

No data was found that identifies which digital platforms are most used in Chile. However, the General Manager of Spotify Latin America, Gustavo Diamen, said that Chile is the country that uses Spotify the most in the region.

### 2.5 Physical and Digital Distribution

For physical distribution in Chile, there is currently no network or company that provides 100% coverage, hence each label oversees the management of its discs. In terms of digital distribution, the international actors Altafonte and Believe Digital stand out. At a local level, PortalDisc is the largest and only digital music store. It is mainly focused on Chilean music, although it is also open to other styles and languages.

**“...due to the inexistence of a national record store chain and the local shops concentrating in Santiago, music in physical formats is not easily accessible for the whole country.”**

Chilean labels and musicians preferentially use the international aggregators Altafonte, Believe Digital and, to a lesser extent, CD Baby. Recently, the first national aggregator, Push, was created. This aggregator, in agreement with the main streaming platforms and online stores, represents a relevant opportunity for the Canadian industry because it is a local aggregator with national networks and an exclusive dedication to the territory.

In terms of promotion, another format that is being used in Chile is the Label Services that the independent labels provide to foreign artists or labels. Although it can mean a slightly higher cost, it allows artists to effectively promote their diffusion in the country via the networks, media and contacts that each label handles.

### 2.6 Industry players

**AGEM**, La Asociación Gremial de Editores Musicales de Chile (The Association of Music Editors of Chile), is the guild of musical publishers. Among its members are the local variants of Sony, EMI, Warner and Universal. Its objective is to establish and consolidate the management bases in Chile, which will then allow the promotion and collection of the copyrighted works of both national and foreign artists.

**AGEPEC**, La Asociación Gremial de Empresas de Entretenimiento y Culturas (The Association of Companies of Entertainment and Cultures), aims to strengthen each area of the music entertainment industry in Chile. Its objective

is to professionalize the industry as much as possible, build reputation within its actors and maintain a permanent and fruitful bridge with all market players, from the authorities to the suppliers and the public.

**ANC**, La Asociación Nacional de Compositores (The National Association of Composers), is the main group of composers in the country. Its objective is to bring together Chilean composers, stimulate their artistic production through better knowledge and dissemination of their works, and contribute to the development of music collaborations at national and international levels, preferably with North American countries.

**CASI**, Las Compañías de la Escena Independiente Chilena (The Companies of the Chilean Independent Scene), is an association of Chilean labels whose purpose is to internationalize the activity of the local agents.

**CNCA**, El Consejo Nacional de Cultura y las Artes (The National Council of Culture and the Arts), is the state institution in charge of implementing the public policies for cultural development. It aims to promote a harmonious, pluralistic and equitable cultural development among the inhabitants of the country, through the promotion and diffusion of the national artistic creation as well as the preservation, promotion and dissemination of Chilean cultural heritage.

**IFPI Chile**, La Asociación de Productores Fonográficos de Chile (The Association of Phonographic Producers of Chile), is a non-profit trade association whose primary purpose is to protect activities aimed at the production and publication of phonograms and music video recordings on different material and immaterial supports.

**IMCHILE**, La Industria Musical Independiente de Chile (The Independent Music Industry of Chile), is the first union association which groups the independent sector of Chilean music. Among its associates are labels, promoters and distributors, which together have the largest independent musical repertoire in Chile. The goal of IMICHILE is to contribute to the development of the independent music industry through associative work and encourage cooperation to promote the production, promotion, marketing and export of phonographic productions.

**MIV**, Los Músicos Independientes de Valparaíso

(Independent Musicians of Valparaiso), is a group of musicians from the region of Valparaiso whose aim is to promote the independent music industry of that region, in all its related fields, from training and mediation to production and diffusion.

**PROCHILE** is the Institution of the Ministry of Foreign Affairs, responsible for promoting the exportable supply of Chilean goods and services and contributing to the diffusion of foreign investment and the promotion of tourism. It has 15 offices located in each of the country's regions and an external network of more than 50 commercial offices located strategically in the most important markets of the world, including Toronto and Montreal in Canada.

**PROFOVI** is a private non-profit corporation that represents and defends the intellectual property rights of the producers of music phonograms and videograms, functioning as a Collective Management Society of intellectual rights.

**SCD**, La Sociedad Chilena del Derecho del Autor (The Chilean Society of the Rights of the Author), is a private organization formed with the fundamental purpose of administering the rights for the public communication and reproduction of the musical works of its associates. This includes: (1) The granting of a license (authorization) to users, whenever the music is communicated to the public or recorded on audio or audiovisual media; (2) The collection of the rights generated, and (3) The distribution of these rights to their respective authors or rights holders.

Among the actors mentioned above, CNCA and ProChile are particularly good contacts if seeking to generate commercial alliances at the governmental level on small, medium and long term bases. In order to consolidate and create export relations for Chilean music, both institutions are open to conversing and seek allies in foreign markets such as that of Canada. Generating alliances with associations of local companies or musicians, or with a particular Chilean company or artist, is also a very good way to penetrate the Chilean market. This can be done under the concept of "sponsorship" by an agent recognized in the local industry, one who will support and present the artist to his/her peers and other key actors in the national scene.

### 2.7 Trends

Currently, Chile can be seen as undergoing a boom in its music market, which has grown by 377% in the last year. This runs hand-in-hand with a trend of massive music festivals of different genres, from rock to electronic. Despite the rising popularity of festivals, there is a great turnover rate. That is to say, festivals are created for a couple of editions and then disappear, only to be replaced by others. Two festivals have remained during the last few years: the acclaimed Lollapalooza Chile and Fauna Primavera.

Concerning the origin of the music, the Second National Survey of Participation and Cultural Consumption revealed that 47.7% of the population prefers music from Latin America, followed by national Chilean music (24.2%) and music from the USA (13.7%). Likewise, there is a tendency to prefer music from greater Latin American and Chile as the age of the respondents increases. More specifically, genre-wise, the same study revealed that 45.1% preferred romantic music, followed by tropical (27.1%), folklore (26.4%) and rock (21.5%).

**“Despite the rising popularity of festivals, there is a great turnover rate. That is to say, festivals are created for a couple of editions and then disappear, only to be replaced by others.”**

### 2.8 Strategies

Phonographic production in Chile has been increasing in recent years. Given the easier access to recording technologies, artists are now guaranteed products with a high level of professionalism for a low cost. 1,021 albums were produced in Chile during 2014 (versus 642 in 2012 and 1,017 in 2013), confirming that there is a broad talent base and a healthy creation index.

Chilean music has been the focus of attention from powerful musical foreign markets in terms of size and turnover. The high rate of phonographic production and the improvement of its quality standards have made it a diverse and tempting offer for the international scene, which already speaks of a boom in Chilean music.

Although it is a small and limited market, users and



consumers of music products have high levels of permanence and fidelity. It is a captive market that, being reinforced by normative factors, should see a progressive growth. The newest addition to regulation in music is the 'Law of the 20%', an amendment to the Music Promotion Law (Ley de Fomento a la Música) passed in April 2015. This would impose a local content quota of 20 per cent of music broadcasted on the radio. Additionally, 25% of that local content would have to be made by emerging artists (published in the last 3 years).

Colombia, Mexico, the United States, Germany and Spain are the most important potential markets for expansion of Chilean musical products. They extend the field of action for national agents of the sector and present development opportunities which offer sustainable and dedicated activity from musicians and mediators.

The distribution of intellectual property rights in the field of music (copyright, related interpretation and production) has historically been conditioned by the difficulty of implementing reliable measurement systems. Intellectual property represents one of the main resource points for the agents of the sector. Today, a system has been implemented to identify public communication of works via a "digital fingerprint". This predicts the possibility of fine-tuning mechanisms to distribute the rights, doing so in a fair manner and according to the current legislation.

For artists in the Canadian independent music industry, the best way to enter the recorded music market is to license their records with Chilean labels to develop PR work and promotion locally. In this regard, it would be beneficial for Canadian and Chilean artists to develop alliances or reciprocity agreements through their labels and representatives.

The previously-mentioned promotional work that Chilean independent labels could develop would consist of distributing the work on certain platforms, such as PortalDisc, which has a distribution service reaching more than 1,000 radios. The labels can also ally social networks for short periods of time to generate expectations. Another suggestion is to hire press agencies such as La Union, Harmonica or Pencil and Paper.

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## 3. LIVE MARKET

As mentioned above, the annual turnover of the live market is estimated around US\$ 125,000,000 with bounded margins ranging between 7% and 15%.

Concerning attendance, the results of the Public Performance Survey (Encuesta de Espectáculos Públicos, or EEP) show that, in 2014, 3,331,671 people attended music shows in Chile, of which 54.3% paid admission and 45.7% attended free of charge. The Third National Survey of Cultural Participation and Consumption revealed that 25.8% of the urban population aged 15 and up reported having attended concerts or recitals in the 12 months prior to being surveyed, compared to the 70.3% who acknowledged not having done so (in the last year) and the 3.9% who had never attended one of these shows.

Also, among those attending concerts in the last year, 21.2% did so to see an international act. It is important to note that the percentage of concert attendance for international artists increases as the socioeconomic level of those surveyed increases (CNCA, 2013).

Notwithstanding the above, the number of concerts occurring in Chile has declined. In fact, the 4,479 musical performances in 2013 represented a decrease of 4.3% compared to 2012.

**“It should be noted that there is a greater presence of these spaces in the south central area than towards the north of the country. The regions with the greatest number of concert venues are: Metropolitan (28.4%); Valparaíso (19.9%) and Bío Bío (9.9%).”**

### 3.1 Promoters

In Chile, the major promoters focus on the production of concerts by prominent artists or international festivals, betting on an audience of over 20,000 people and whose prices per entry can range from US\$ 30-150 or higher. Mid-range promoters target an audience of 1500-2000 people, with shows selling tickets for US\$ 15-40, while the small promoters offer productions for 200-500 people, whose tickets sell for US\$ 7-10.

**Bizarro** is the largest operator of Latino shows in Chile, with annual sales of about 220,000 tickets and more than 25

international shows every year. It is also the largest content provider for the Viña Festival in the last 3 years. Today, this production company has been integrated into Time 4 Fun, creating T4FBizarro, now one of the main promoters of the country. It maintains the editorial line focused on pop and mainstream music.

**DG Media** is a major producer of events in the country. In 2016, they were in charge of concerts by The Rolling Stones, Guns n Roses and Selena Gómez, among others. It should be noted that DG Media has not ventured into the production of festivals.

**Fauna** presents a new concept of parties and live music. Fauna is an independent music diffusion platform that has its own aesthetic and recognizable style. It aims to bring together the best bands and national and international DJs from the underground scene. Among its projects is the festival Fauna Primavera, which has seen six editions. In 2016, Fauna produced concerts by Mac de Marco, Pet Shop Boys, Kaiser Chiefs and Crystal Castles, among others.

**Fenix** was created in the late 80's, and today, Fenix Entertainment Group is one of the leading companies of integral entertainment for the Latin American markets. In 2016, they were in charge of producing concerts by Mariah Carey and Cypress Hill, among others.

**La Clave** is a smaller producer. It is in charge of events for all kinds of national artists, emphasizing the musical and humorous scenes. Today, it runs a booking agenda for artists mainly in the alternative rock scene, which caters to teenagers.

**Lotus** is one of the main producers in the country, mainly responsible for mega concerts and festivals. It is the producer in charge of Lollapalooza and Sonar Chile, as well as big concerts by artists such as Black Sabbath and Pearl Jam. It has a strong focus on alternative and Anglo music.

**Multimúsica** is a producer of events focused mainly on managing shows by great Spanish-speaking artists. In 2016, they managed the production of the concerts by Ricky Martin, Miguel Bosé and Prince Royce, among others.

**Swing** is a producer of events of all kinds, from big concerts to children's shows. In 2016, music-wise, they were responsible for the concerts of Marco Antonio Solís and Paul Anka.

**The FanLab** is a recently-established promoter with a growing position in the market. It is mainly associated with rock and metal concerts. In 2016, they were in charge of managing the concerts of Aerosmith and Joe Satriani, among others.

Time 4 Fun (T4F) is the largest promoter in South America and the fourth-largest in the world. It is also the first company of its kind that is publicly traded. With a global turnover of over US\$ 150 million per year, T4F operates in Brazil, Argentina, Chile and Peru. This producer is especially dedicated to developing great pop and Latin pop concerts, although it has also expanded to include classical music shows and large alternative music concerts.

Transistor is another great promoter in the country. Its events are mainly associated with the Teatro Cariola, where they do a lot of promotion. Transistor has also been part of the creation realization of music festivals including the Frontera Festival and the Rock Out Fest. Its main focuses are in rock, hip-hop, reggae and other black-roots genres.

#### 3.2 Booking agents

In Chile, there are 27 booking agencies, 21 of which are located in the Metropolitan Region. Most of the live performance organization and booking work is done by the independent labels.

There are many independent booking agencies, such as Harmonica and La Unión, that include foreign artists in their repertoire, which they represent and promote in Chile. The independent scene, especially, presents a space for foreign bands to generate international alliances for commercial exchange. It is essential for artists to have a local ally in any new market they are seeking to penetrate. In this sense, there is an opportunity for Canadian independent music.

#### 3.3 Festivals

Until the last decade, Chile only had one major festival, “Festival Internacional de la Canción de Viña del Mar”, which opened in 1960 and has since had over 50 editions. On the other hand, there has been a custom of small

traditional festivals in the non-capital regions of the country. These are currently maintained in the format of “Semanas” (“Weeks”), of which there are more than 1000. These community festivals are part of local holidays and feature Chilean and international artists, usually of dance genres such as cumbia, salsa and ballad.

However, since 2010, new festivals have emerged that seek to open spaces for musical diversity, and they have successfully registered with a Chilean public that increasingly consumes diverse musical styles. These festivals represent an excellent opportunity to promote developing artists to specific audiences, according to genres. It should be noted that this trend goes hand in hand with the growing popularity of Anglo genres in the national market, with Anglo-oriented indie music being one of the most popular genres among the youth. Some of the festivals with these characteristics are: Lollapalooza, Fauna Primavera and Frontera.

#### Showcases

The showcases in Chile are very recent and, for that reason, very few have been done within the national territory. In fact, until now, they have only been carried out in the context of IMESUR, Día de la Música, Feria Pulsar and Fluvial. IMESUR, completely focused on Latin music and World Music, has seen two editions and is already positioned as one of the relevant milestones of industry meetings in the city of Santiago. On the other hand, Pulsar, although it does not have a specific genre market and covers a great diversity of genres and styles, is developed in a fair-style format. It has a lot of content for the public to engage with, such as products and services associated with music, including instruments, music schools, instrument brands and DJs. Its latest versions have been incorporating networking and conference activities, aiming to make it more attractive to industry players. It can be an opportunity when considering it along with tours, concerts or complementary shows.

#### Summer

Unfortunately, there is little data available and there is no single systemized record of attendance at festivals. It is worth mentioning, however, that this lack of information has been detected by the industry, and the government has now defined the generation and systematization

### 3. LIVE MARKET Opportunities for Canadian Independent Music Companies in the Chilean Music Market

of this information as a strategic objective for the development of the national industry.

#### City

Although great festivals can be seen throughout the national territory, most tend to concentrate in the metropolitan region and in the region of Valparaíso. Below is a list of cities by region and the number of shows held there during 2014 and 2015, along with the main festivals of each city.

**“...in economic terms, concerts in outlying regions offer lower fees, smaller venues and greater transport costs, both for the artist and the technical equipment. All of the above can make the shows not economically profitable in other cities.”**

CITY	REGION	2014	2015	MAIN FESTIVALS
ANTOFAGASTA	Antofagasta	13	7	Festival Chile Jazz; Festival de Antofagasta
LA SERENA	Coquimbo	45	23	Festival de La Serena
VALPARAÍSO	Valparaíso	473	374	Rockodromo; Festival de Viña del Mar
SANTIAGO	Metropolitana	1957	2065	Lollapalooza; Primavera Fauna; Día de la Música; Frontera Festival; En Órbita; Neutral; Rockout; Spring Festival; The Metal Fest
CONCEPCIÓN	Bío Bío	349	408	Rock en Concepción
VALDIVIA	Los Ríos	25	21	Valdivia Fluvial; Relincha; Marea Rock; Festival de Jazz de Valdivia

Table 2: Number of festivals per Chilean city, 2015-2015. Source: IMIChile

Accordingly, spaces or rooms equipped for recitals or concerts tend to present a similar distribution of existence, with the regions of Santiago and Valparaíso concentrating 44% of the venues in the country. It should be noted that there is a greater presence of these spaces in the south central area than towards the north of the country. The regions with the greatest number of concert venues are: Metropolitan (28.4%), Valparaíso (19.9%) and Bío Bío (9.9%).

Finally, it is important to consider that the results of the Encuesta de Espectáculos Públicos (Public Shows Survey), show that the regional distribution of musical events is concentrated in the metropolitan regions of Santiago (54%), Valparaíso (11.4%) and Biobío (7.3%). As for the regions in the extreme north and south of Chile, their attendance percentages do not exceed 1% of the total.

#### **Multi-Arts**

In Chile, there are not many mixed festivals or instances of encounter between the artistic disciplines in the same event. However, there are exceptions, such as the Festival Internacional Santiago a Mil and el Carnaval Mil Tambores in which music, dance, and circus activities are celebrated.

Festival Santiago a Mil

[www.fundacionteatroamil.cl/santiagoamil/](http://www.fundacionteatroamil.cl/santiagoamil/)  
[info@fundacionteatroamil.cl](mailto:info@fundacionteatroamil.cl)

The first edition of Santiago a Mil back in 1994 launched as a new space for the performing arts. Produced by Carmen Romero and Evelyn Campbell, it has grown to become a national referent in the sector. Since 2012, the festival has included musical activities under the name 'Tocatas a mil', mainly performances in symbolic venues in Santiago. Their next edition in 2017 will present 30 local and international artists across the capital's venues.

Carnaval Mil Tambores

[www.miltambores.cl](http://www.miltambores.cl)

Since 1999, this Valparaíso carnival takes place during the first weekend in October, lasting 3 days. Music, dance, sports, poetry, talks and art are mixed with the port city's bohemian character.

**Contact:** Chago Aguilar, Director  
[chagoaguilar@miltambores.cl](mailto:chagoaguilar@miltambores.cl)

#### **Genres**

Concerning the genre of concerts represented, the Second Survey of Participation and Cultural Consumption, reveals that rock concerts congregate more than a quarter of concert attendees. Folk music is in second place, with 15.6% of attendees, and the romantic ballad is in third place, with 11.9%.

### **3.4 Touring Structure**

Chile is generally a safe country with a very good road infrastructure, which allows visitors to transport themselves calmly and on time. The hotel infrastructure generally offers everything from backpacking hostels (US\$ 25 per day) to 5 star hotels (US\$ 200 per day). Given the rate of artists fees and box office tickets for a promotional tour, most tend to use low-cost accommodations: hostels or 3 star hotels with shared rooms. Most of these can be browsed through international booking platforms such as Booking.com, which usually do not administer a significant price surcharge.

Although there are numerous festivals throughout the national territory, the structure of the tours, especially of international artists, is extremely centralized. Santiago and Viña del Mar / Valparaíso are almost exclusive destinations.

This is due in part to the lack of infrastructure, recording studios and venues in regions that allow for decentralization and the generation of strategic locations for national and international audiences. This gap at the regional level can also be seen by the shortage of technical teams capable of managing this infrastructure.

**“...there could be a small tour route to the south, specifically between Santiago and Puerto Montt. To the north, the distances become too long between cities, which makes it difficult to establish a tour.”**

## NUMBER OF FESTIVALS BY REGION

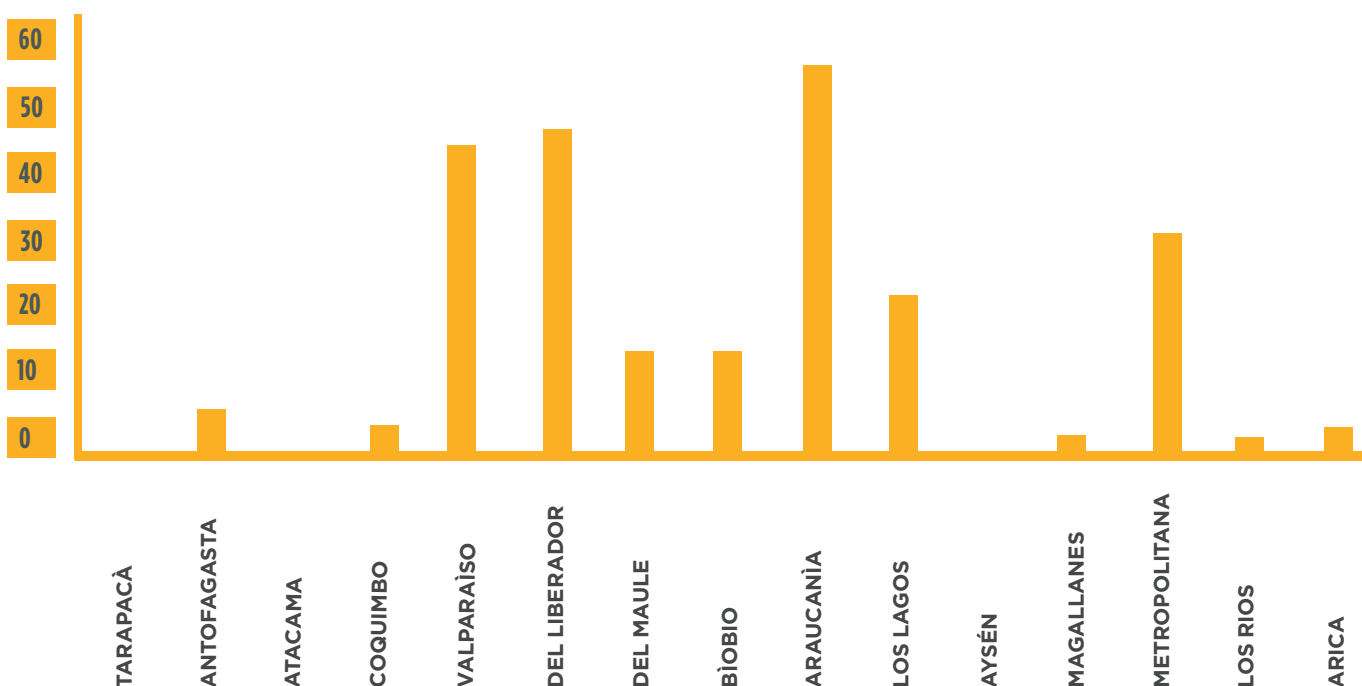


Figure 2. Number of venues per region. Source: CNCA (2015b)

In addition to the above, in economic terms, concerts in outlying regions offer lower fees, smaller venues and greater transport costs, both for the artist and the technical equipment. All of the above can make the shows not economically profitable in other cities.

Notwithstanding the above, there could be a small tour route to the south, specifically between Santiago and Puerto Montt. To the north, the distances become too long between cities, which makes it difficult to establish a tour.

As indicated, due to its long distances, touring Chile is not exactly easy. Furthermore, there are only two airlines that make national trips and only one considered low budget (SKY). Usually, indie bands must travel by bus, and there are multiple companies that reach the whole territory while offering first-class services. Among the most popular are Cruz del Sur, Pullman Bus, TurBus, Condor Bus, Bus Norte and Buses JAC. The website [www.recorrido.cl/es](http://www.recorrido.cl/es) is very useful to plan a bus trip in advance.

Another alternative is the van, as it allows mobility within cities, although for long journeys it is usually a very uncomfortable alternative.

The price of a plane ticket within Chilean territory ranges from US\$ 60 to 240, depending on the dates of purchase and travel. The two domestic airlines in Chile are LaTam

([https://www.latam.com/es\\_cl/](https://www.latam.com/es_cl/)) and Sky Airline (<https://www.skyairline.cl/es/index.aspx>).

The prices of a bus ticket for the same destination range from US\$ 30 to 90. Usually, the date of purchase is not mandatory to secure a certain journey, but the date of travel when purchasing is.

A 15-person capacity van, for a full day's hire, would be around US\$ 150 per day, plus gas.

It is always recommended that artists work with a local producer that can organize such arrangements, as there are usually hotels, bus lines, backline and technical suppliers that maintain alliances with producers in order to obtain low costs and reliability.

**“Another important element to consider when organizing concerts or festivals is the recent “Teloneros Law”, which is still in the process of elaboration and discussion (it was dispatched by the Chamber of Deputies in March of this year). This law would oblige international concert producers to incorporate, as a prelude to the headlining act, the presentation (face-to-face participation) of one or more Chilean artists.”**

### 3.5 Fees and logistics

Concerning main concert venues in the country, the Second Survey of Participation and Cultural Consumption reveals that 41.3% of concerts take place in dedicated and equipped music spaces, such as stadiums, theaters or cultural centers. The second most-preferred venue category is that of public spaces, streets or squares. Another important

element to consider when organizing concerts or festivals is the recent “Teloneros Law”, which is still in the process of elaboration and discussion (it was dispatched by the Chamber of Deputies in March of this year). This law would oblige international concert producers to incorporate, as a prelude to the headlining act, the presentation (face-to-face participation) of one or more Chilean artists.

## CONCERT ATTENDANCE: SPLIT PER VENUE (%)

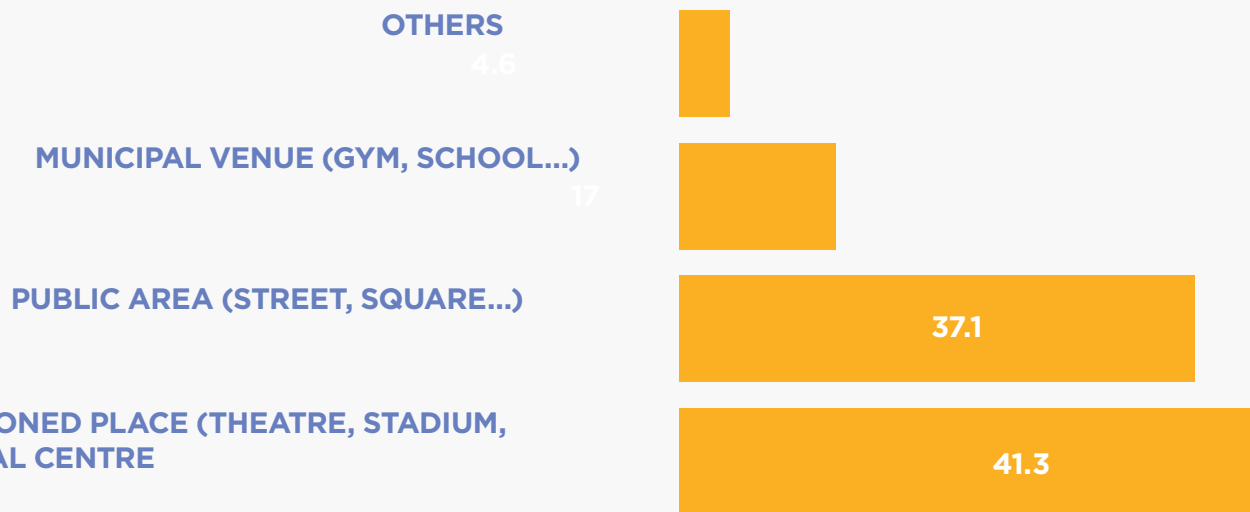


Figure 3. Concert attendance: split per venue (%). Source: CNCA (2013)

As for the payments, there is a great diversity of deals, mainly due to the fact that there are 3 fundamental types of festivals/concerts: private with brands, private with no brand and those financed by the government. The latter tend to see the best payments but also tend to embrace Chilean or Latin American musical genres. Brand-sponsored events tend to lean towards niche programming, and there is a strong interest by these sponsors to present Anglo and alternative music, which has become important in the world of marketing.

Fees for a rising artist are often low, from about US\$ 500 to about US\$ 1000. The fees are generally negotiated to generate deals at the box office, but in the case of developing artists, generally that box office fee will be distributed among more than one artist.

On the other hand, a fairly established artist gets payments ranging from US\$ 1100 to 3000.

## 4. PUBLISHING

### 4.1 Collection Society Regime

**Sociedad Chilena del Derecho** de Autor (Chilean Copyright Society), or SCD, is the first and only society to collect rights, and, although it has received strong criticism from the most emerging musicians, it is an organization that works well and is reliable.

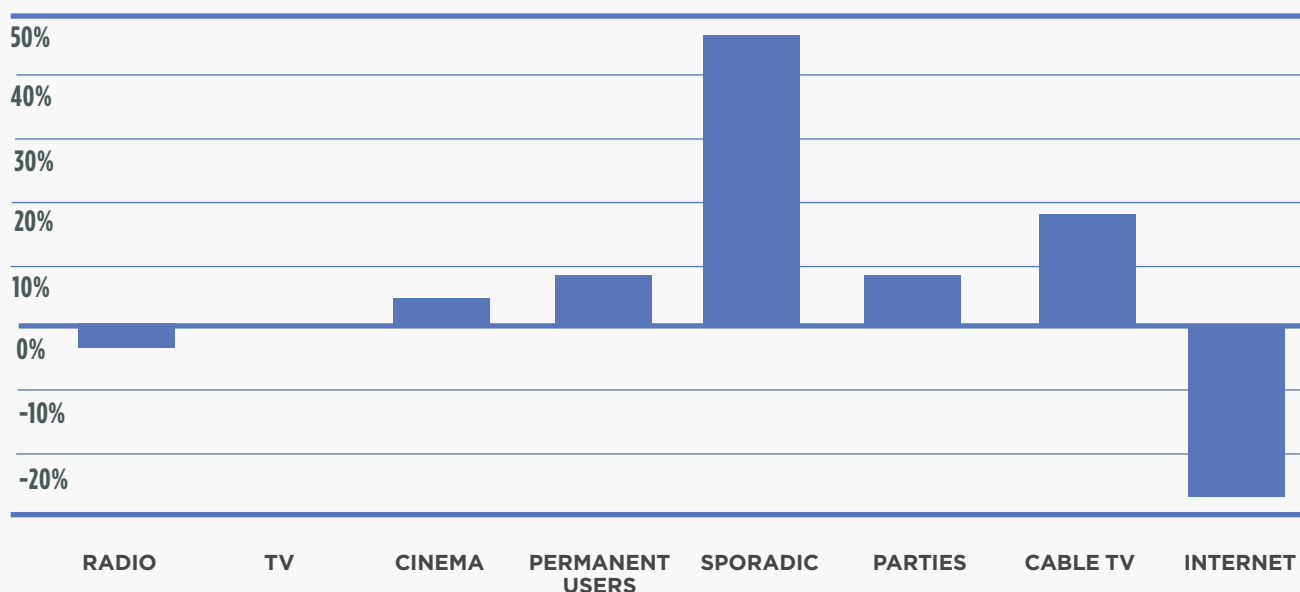
In practise, all events with live music and all commercial premises that use packaged music (either by radio or through music players) must pay a fee for copyright in addition to the one collected by radio passes. The rates depend on the type of show and the type of space or venue. Rates range from 4%, in the case of small parties, to 8% (from ticket revenue) in the case of dance events with live music.

These collections are taken from the producer a few days after the event, but the producer must provide a list of songs that were performed or played. When the show is paying their fees based on a box office percentage, the discount is usually made at the time of the collection calculation.

It is also important to point out that every transaction in Chile is affected by VAT, which amounts to 19%. For the smaller events, it is possible to secure a tax exemption per show, especially if it does not sell or promote alcoholic beverages.

**“In 2014, the SCD distributed US\$ 16,668,915, of which slightly more than half corresponds to foreign companies (51.1%), almost a third to local publishers (32.2%) and 16.7% to national authors.”.**

**VARIATION IN % OF THE AMOUNT OF AUTHOR RIGHTS COLLECTED BETWEEN 2013 AND 2014**



As already mentioned, SCD records show that the annual amount of authors rights collection has increased gradually but significantly between 2009 and 2014, with a positive variation of 46.2% during that period. Over the last year, the organization raised a total of US\$ 22,439,767, 39.4%

of which was collected from permanent users; 23.2% from cable TV; 14.1% from sporadic users; 6.4% from radio and 3.6% from cinema, among other, less significant, categories. However, when analyzing the amounts collected between 2013 and 2014 in accordance with each category, there is a



positive variation for festivals, cinemas, permanent users and, especially, sporadic users (44.1%), while radio, television and the Internet show a decrease compared to 2013.

The systematic increase in the collection of copyright royalties between 2009 and 2014 coordinates with the systemic increase in the total amount of distribution for these rights, both for national authors and local publishers, as well as for foreign companies. Thus, in 2014, the SCD distributed US\$ 16,668,915, of which slightly more than half corresponds to foreign companies (51.1%), almost a third to local publishers (32.2%) and 16.7% to national authors.

Distribution of rights should tend to become more accurate with the incorporation of the airplay measurement system (Bmat) by management entities. However, it is still uncertain as to when the effective use of this technology will begin and what its exact consequences will be on the process of rights distribution.

### 4.2 Industry standards

Like other sectors, the publishing sector is fairly incipient in Chile. Historically, it was dominated by the majors, but after the crisis of physical sales, these retired in Chile, closing their offices in 2006. This sector has still not really taken off, and at the moment there is only one publisher dedicated exclusively to its role: SoundMachine. This loss has been exploited by the independent sector, whose labels are currently carrying out the country's publishing work. According to the last census, there are 206 labels in Chile, of which an important but indeterminate part works on alternative and indie music. This, coupled with the desire of the Chilean labels to export their content and thereby generate links with the global markets, makes it clear that these connections with the independent labels are the best opportunity for Canadian artists to enter the Chilean market.

It is worth noting that, today, it is the independent labels that play the main role of intermediaries and diffusers of both Chilean and foreign alternative music. According to the study developed by IMICHILE, of the 15 labels surveyed, all of them carry out three or more industry activities (booking, press, production, touring, editing, recording, etc). Significant changes in the standards for recording and producing albums seem to be at the basis of this picture. 55% of the

albums published in Chile during the studied year are works that demanded less than one million pesos to finance (US\$ 1,500).

A significant percentage corresponds to discs in the budget range, which accounts for those between one and five million pesos (US\$ 1,500-7,500). There is a large bulk of works edited by independent labels, who have more concentrated means, which range from five to ten million pesos (5%). Only 1% of phonographic productions cost more than ten million pesos (US\$ 7,500-15,000+), and those have the budget support of the multinational labels.

This is a reflection of how the local music industry has changed, in this case regarding the introduction of new resources that allow the musicians to record using home software, thereby overcoming the expense of recording studios. With the rise of downloadable music, the internet also allows artists operate without the duplication and manufacture of discs, as well as the printing of covers. The same network, in the current age of social networks, completes the virtuous circle by providing free tools for dissemination, press and public relations (CNCA, 2012). This allows artists to manage every element of creation and distribution at minimal cost.

### 4.3 Sync Opportunities for English Catalogues

As pointed out in preceding sections, in Chile, there are very few companies dedicated to synchronization. However, those that exist are open to foreign music, considering the arrival of Anglo music in the country, as well as its global popularity. Companies such as KLI Records boast many international clients in addition to Chilean artists, and they are always eager for new content to include in their catalog.

As for the licensing of music for advertising, it should be noted that there is no direct mechanism or dedicated company except Soundmachine, the only company dedicated exclusively to publishing.

## 5. SECONDARY MARKET

### 5.1 Gaming

The video game market in Chile, although recent, has had an explosive growth. Recently, the association of video game companies, VG CHILE, has been created, bringing together 29 companies in the sector and representing 85% of the total market. Although also incipient, this growing sector may represent an opportunity for Canadian music, especially for finding familiar international sounds at a lower cost.

### 5.2 Merchandising

Over the last couple of years, the sale of merchandise in Chile has been reborn, from t-shirts to handbags and accessories, which are the favorites of the public. Again, since it is a relatively new service in the country, there is no data or specific supporting information available.

### 5.3 Brand engagement

There are currently several brands that sponsor and / or organize music events and recitals. Among the main ones are::

BRAND	PRODUCT	EVENT
Ballantine's	Whisky	Owner of Ballantine's Records Sponsors Primavera Fauna
Corona	Beer	Organizes: Corona Sunsets Sponsors Lollapalooza
Escudo	Beer	Organizes Escudo Power Party Sponsors Santiago Gets Louder; Frontera Festival; Rock en Concepción
Crush	Drink	Organizes Crush Power Music
Mistral	Pisco	Sponsors Fauna Primavera; Frontera Festival
Pepsi	Drink	Sponsors Lollapalooza; Frontera Festival

### 5.4 Other Players

The secondary market for music is limited in Chile. The agents and companies already mentioned elsewhere in this report are the most relevant players in the industry in this regard as well.

### 5.5 Publishing for Record Music

The following are the most important publishers working with independent music artists in Chile:

#### Majors

Major labels have established offices in Chile dedicated to publishing and began working with the independent music sector about 10 years ago. Direct contacts to specific people within the companies' publishing departments could not be obtained. However these are the most relevant players: Warner Chappell, Universal Music Publishing, Sony ATV, Kobalt and peermusic Publishing.

#### Independents

The independent publishing sector in Chile is fairly young. Most companies have been in business for around 5 years and generally work in synchronisation. The most relevant companies are:

**Soundmachine.** This company focuses on protecting an author's rights through special monitoring software.

**Contact:** Maka Arranka, Creative director ([arranka@soundmachinemusic.com](mailto:arranka@soundmachinemusic.com))

**KLI Records.** Despite being an independent company, Chilean KLI Records has worked with networks such as ABC, MTV, CBS, CW and Lifetime. It has secured sync deals in feature films, TV shows and runways. The company has also produced 360° international artist tours including gigs in venues, music festivals and appearances on radio stations around the world.

**Contact:** Daniel Endrei, Managing director ([dani@klirecords.com](mailto:dani@klirecords.com))

### 5.6 Film, Radio, Gaming (Auxiliary Opportunities for Licensing Recorded Music)

The main audiovisual production companies in Chile are: Fábula, Giraffe, Stranger Curation, and The House Films.

As for radio, it is most often listened to via dedicated radio apparatus (80.5%), followed by mobile phones (29%) and computers (28.2%). It is also important to consider that there are 88 online radios in Chile and 1603 broadcasting signals, of which 694 are repeaters. Additionally, a law was approved recently requiring all radio stations to have a minimum of 20% national artists within their broadcast content.

**“It is worth noting that, today, it is the independent labels that play the main role of intermediaries and diffusers of both Chilean and foreign alternative music. According to the study developed by IMICHILE, of the 15 labels surveyed, all of them carry out three or more industry activities (booking, press, production, touring, editing, recording, etc.)”**

## 6. MEDIA AND PUBLIC RELATIONS

### 6.1 How the PR network works

**“In Chile, it is not possible to pay for placement in editorials. Publication or appearance in a medium goes hand in hand with the interest of the journalist or publisher to publish it.”**

To promote a new artist in Chile, whether Chilean or foreign, it is essential to have at least one month of work before promotion can be successful. Communication and planning is fundamental, and having the time to develop it is ideal. After collecting all the material, artists should prioritize key, simple messages and ideally identify a clear aesthetic line. Then, they should send basic information (EPK, photos, graphics and links) to the main national music journalists, where they are briefly presented with the new music and invited to listen to it. Depending on the preference of the journalist, even physical copies of the music can be sent. Afterwards, artists can begin to calculate how to develop according to the interested media, or they can plan objectives to disseminate the project. Although there are media personalities that copy the pieces as they are sent by the agency, it is proven that the most efficient promotion is the one that arises from its own exclusive content, where each journalist develops the news independently.

In Chile, it is not possible to pay for placement in editorials. Publication or appearance in a medium goes hand in hand with the interest of the journalist or publisher to publish it. For this reason, contacts are fundamental when presenting a new artist. Knowing the journalists, and having the backing of a communications agency or a recognized and respected PR team, is fundamental to achieving good results. Another very important point is knowing how to present the information in a way that makes it very attractive for the media. Therefore, it is fundamental to study target journalists or editorials and analyze their interests. If the above steps are not adhered to, it is very difficult to get into some Chilean media.

### 6.2 Media and PR Opportunities

In Chile, there are currently 107 websites dedicated to music, of which 30 exclusively cover Chilean content and the remaining 77 present a combination of both national and international artists.

Unlike other countries, in Chile there are not many non-digital media platforms focused 100% on music. Magazines such as Rolling Stone ceased printing a couple of years ago. The low sales of advertising and physical copies mean that, today, there are almost no music magazines printed in Chile.

Newspapers, however, have recently opened a space for national and international independent music. Interviews, reviews of albums, tours and record releases attract the attention of journalists, who are increasingly apt to write about emerging and unheard-of artists. In order to be featured among this content, as a foreign independent band, is to conduct some important local activity or to build on a national hit.

Like the written press, open television caters to national independent music, but remains difficult to access for new national and international artists.

After internet, radio is the second most open medium to the independent music industry. Curation in radios, thanks to Chilean music's place in the public's interest, has featured more independent artists. The radio is more daring in presenting new music and artists and could therefore be very accessible for Canadian musicians. At the same time, the scope and importance of digital radio is growing every day in Chile, and these are the most likely to support national or international independent music.

According to the above, it can be determined that the main way to enter the Chilean market is through the promotion across digital mediums. In Chile, there are important music blogs, such as Super45 and Potq, which are characterized by their presentations of new music and their support of the music scene in general. They can be a great promotional tool for foreign bands, considering that they are one of the main doors of entry to the Chilean public.

On the other hand, social networks are fundamental to maintain and encourage an artists' connection with their followers. This is especially true in Chile, where the use of digital media is very important for all spheres, as it is a very connected country with the largest broadband in Latin America.

### 6.3 Key Media and PR Contacts

The best entry points for Canadian independent artists into the Chilean market are social networks, radio channels and digital media. Television and printed press are not particularly recommended for promotional activities for emerging artists.

Promoting through traditional media poses tough challenges to independent artists. Printed music magazines are a defunct resource, with the Chilean music press based online.

**“...the scope and importance of digital radio is growing every day in Chile, and these are the most likely to support national or international independent music.”**

Local Music PR agencies have experience in promoting international artists in the domestic market. Hiring a local PR is especially useful for bands entering the market, since the Chilean media operates largely on contacts and good working relationships.

**La Unión** ([www.launionagencia.com](http://www.launionagencia.com)).

**Contact:** Francisca Sandoval, Communications manager  
([francisca@launionagencia.com](mailto:francisca@launionagencia.com))

**Lapiz&Papel** ([www.lapizpapel.com](http://www.lapizpapel.com)).

**Contact:** Francisca Wienecke, Partner  
([francisca@lapizpapel.com](mailto:francisca@lapizpapel.com))

**Songbird** ([www.songbird.cl](http://www.songbird.cl)).

**Contact:** Natalia Díaz, Press manager  
([nataliadiaz@songbird.cl](mailto:nataliadiaz@songbird.cl))

<sup>2</sup> Armónica ([www.armonica.cl](http://www.armonica.cl)). To this day they have only promoted Spanish-speaking indie artists, but they have a good network of contacts.

**Contact:** [comunicaciones@armonica.cl](mailto:comunicaciones@armonica.cl)

Bands that do not have the budget to develop a media & press strategy can still contact journalists and independent digital media outlets for promotional opportunities. The following media outlets are eager to collaborate with new independent artists:

**Blogs / Online magazines:** Rockaxis.com, Super45.cl, potq.net, Disorder.cl, Mor.bo, joiamagazine.com and humonegro.com.

**Broadcasted radio:** Rock&Pop ([www.rockandpop.cl](http://www.rockandpop.cl)), Zero ([www.radiozero.cl](http://www.radiozero.cl)), La Clave ([www.radiolaclave.cl](http://www.radiolaclave.cl)) and Usach ([www.radio.usach.cl](http://www.radio.usach.cl)).

**Digital radio:** Rinoceronte ([rinoceronte.fm](http://rinoceronte.fm)), Súbela ([www.subela.cl](http://www.subela.cl)) and Molécula ([www.molecula.cl](http://www.molecula.cl)).

**Press:** El Mercurio y La Tercera, Revista Paula, Revista Ya and Finde y Vida Actual.

# 7. VISA SYSTEM, TAX WITHHOLDING POLICY AND OTHER PRACTICAL INFORMATION

As in many other countries, to work in Chile as a foreigner, it is necessary to comply with certain legal requirements related to work visas. First and foremost, it is of great importance to secure an artistic representative or producer, since they will be the one who must apply for a tourist visa at the Chilean Consulate and prove the artistic quality of the applicant. It is the same representative who subsequently (and before any shows conducted by the artist) must apply for a work permit at the Department of Foreign Affairs of the Ministry of Interior in Chile, Sección Atención de Público, ubicada en San Antonio N° 580, Piso 3.

### The required documentation for foreigners is as follows:

- Passport in original and legible photocopy to portray identification sheet, passport number, date of issue, expiration date and, if applicable, the page with the stamp of the last entry to Chile. In the case of entering with another identification document (Identity Card, DNI, etc), visitors must provide original and photocopy version.
- Legible photocopy of the Tourist Card of each foreigner, when he / she has entered the country, otherwise he / she must present them the following business day.
- Letter requesting this authorization where stipulated: Name and RUT (Rol Único Tributario) of the employer or producer, the activity to be performed, dates and times of the acts, venues where they will take place and fees that will be received.
- Work contract, which must be signed by both parties with a notary (submit photocopy)
- Settlement of contract signed by both parties with a notary (submit a photocopy)
- Photocopy of resolution approving the registration in the category of artistic entrepreneurs, granted by the Ministry of the Interior
- List of foreigners, with full name, nationality, and passport and / or document of entry to the country.
- Paid work permit for each foreigner, equivalent to 150% of the value of the visa. This is subject to contract, according to nationality, through a postal/remittance order (“Orden de Giro”) granted by the Department of Immigration, which can be submitted at any commercial bank.

In addition to the corresponding permits to work in Chile it is also necessary to consider the tax on payments received and profits of events held in Chile. In legal terms, the country’s Income Tax Law, Article 60, provides as a general rule that natural persons who do not have a residence or domicile in Chile and companies or legal entities incorporated outside the country (including those that are set up in accordance with Chilean laws, which receive or accrue income from Chilean sources that are not subject to tax) will pay an additional tax of 35%.

**“...it is of great importance to secure an artistic representative or producer, since they will be the one who must apply for a tourist visa at the Chilean Consulate and prove the artistic quality of the applicant.”**

However, in paragraph 2 of the same article, an exception is made to remunerations derived exclusively from scientific, cultural or sports work or ability of foreign persons. For foreigners working in the Chilean cultural field for less than 90 days (and who do not have a residence), the employer must deduct 20% of their remuneration as Additional Tax. The discount and payment of this tax must be made by the producer of the event in Chile (employer) before the foreigner leaves the country.

As a summary, to work as a foreign artist in Chile, it is necessary to have tourist visa and file the permit in the Department of Foreign Affairs. All of these procedures are generally performed by a representative of the artist or producer, since it is they who must prove the quality of the artists involved.

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## Opportunities for Canadian Independent Music Companies in the Colombian Music Market

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**Researcher:** *Tantaka*

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# 1. GENERAL OVERVIEW

**“All national distribution media, such as television channels, newspapers and radio stations, are headquartered in Bogotá. Due to this media concentration, most other regions tend to follow what happens in the capital. Therefore, it is important to focus a great part of Colombian efforts on Bogotá in order to be in the right venues and places, as what happens in this city will help build the band’s prestige in the rest of the country.”**

Colombian music has been appreciated by the public both in and outside the country. Composers and national musicians enjoy local recognition while successfully projecting themselves on different stages across the world. The scope of the country’s music genres has consolidated Colombian music as a symbol of national identity and a cultural product that has broken boundaries in terms of industry and musical taste.

Colombian music has travelled parallel to the migration of the national musicians, who were forced to record abroad due to the national record industry’s lack of infrastructure. The music also reached far markets when Colombian companies requested vinyl be pressed abroad for domestic and international sales. This national music environment created an expansion of Colombian rhythms across borders, from the early bambuco rhythms to vallenato and the present-day “Pacific Coast” rhythms. Visitors and foreigners will often also associate cumbia and salsa to Colombia as Latin genres.

After over ten years of continuous decline, the Colombian music market is back on the rise. Both the international consultancy firm Price Water Cooper and the last IFPI report remark that the market is growing, primarily the digital recorded music sector and the live music sector.

Colombia has become an obligatory destination for international artists visiting the region. Its variety of music genres, encouragement to fuse with international rhythms and its geographic location are the biggest attractions offered by its national market.

It is no surprise that Colombia’s artists have been globally celebrated, including Carlos Vives, who holds the record

for greatest number of Latin Grammy nominations, and Shakira, who has received over 100 awards since launching her music career. The Colombian music industry is one of the most envied and desired by many independent artists who recognize the country in its accelerated state development.

Colombia boasts a great variety of artists, genres, musical expressions and, above all, a prolific creation of musical works. However, this is still very centralized in the big cities of Bogotá and Medellín, and, at a lesser level, Cali. Nevertheless, globalization has permitted many intermediate cities, such as Cartagena, Bucaramanga, Santa Marta and Barranquilla, to become important places for a growing music industry.

As is a global trend, live music shows are becoming more popular. This increase in audiences translated to an increase in revenue for the greater national music industry.

## 1.1 Market size and dynamics

According to PWC, global music expenditure is expected to grow from US\$ 49.9b dollars in 2012 to 53.8b by 2017, with a year-on growth rate of 2%. Revenues derived from downloading, subscription services, live music video broadcasting, digital radio services, public performance rights and synchronization contracts are growing. The trend in Colombia is not far from that of global behaviour. Data from the Cuenta Satélite de Cultura (Culture Satellite Account), CSC, identified a music business model reconfiguration characterized by sustained revenue growth coming from live music shows, whereas the revenue from the phonographic industry has decreased.

The growing access to the internet and the saturation of mobile devices provides thousands of possibilities to download data, music and videos in real time, provide access to blogs and free programmes and mix and produce sounds. Most notably, social networks provide a platform through which all kinds of music and promotional activities are broadcasted. These dynamics currently prevail in the music industry.

Some of Colombia's biggest independent artists today, such as ChocQuibTown, Bomba Estéreo or Monsieur Periné, used to play a plethora of small concerts to spread their music, but now they play the leading role in their country's music industry. Today, these artists have signed with major labels (those listed are all under Sony), but they arose from an intense independent movement in the country. This movement took advantage of the new technologies that allow creators and consumers to talk about a lively independent scene.

### 1.2 How to navigate the market

Colombia is a centralized country. All national distribution media, such as television channels, newspapers and radio stations, are headquartered in Bogotá. Due to this media concentration, most other regions tend to follow what happens in the capital. Therefore, it is important to focus a great part of Colombian efforts on Bogotá in order to be in the right venues and places, as what happens in this city will help build the band's prestige in the rest of the country. Currently, Colombia offers a setting of music effervescence, big challenges to consolidate a solid industry and a sector committed to making the music profession profitable.

The music industry in Colombia is in development, and with an accelerated growth that has increased competition, it is important to first acknowledge relationships and competitors. Networking in Colombia can be a very delicate matter, as competition is taken in a quite personal way, and in some cases one business relationship may invalidate another.

### 1.3 Trade conferences and industry gatherings

Globally, music is approached as a completely profitable business where creativity is the basic element for its development. The music market in Colombia has grown in different ways, one of which is seen in the submarkets that have risen, such as networking platforms, platforms for socialization, and collaboration and assistance between projects at different stages, such as that of merchandising and live production.

Comparing the number of gatherings and their sizes to

other Latin American countries, Colombia is one of the countries taking full advantages of the platform. The country has generated many events to stimulate the national industry and facilitate an exchange with the international one. Artists and entrepreneurs in the sector have found within the "cultural market" a platform for the exchange of cultural products and services. Almost all of them work under the same logic, although with different approaches depending on their genre and level of internationalization. They all have a component of frequenting trade conferences, showcases and artistic shows where important transactions have been made. Such diversity, due to the "trend" of identifying and championing cultural markets, has served to strengthen and develop the national music industry, based on a constant dialogue with other sectors such as cinema, videogames, scenic arts, literature and television.

**"Bogotá Music Market (BOMM) is one of the most important in the country. It aims to offer artists the support and education that they need in order to exploit their talent and structure profitable and sustainable music projects."**

Due to the push coming from arts forces as well as both private and public initiatives, several music markets take place in Colombia, such as:

#### **BOMM: Bogotá Music Market**

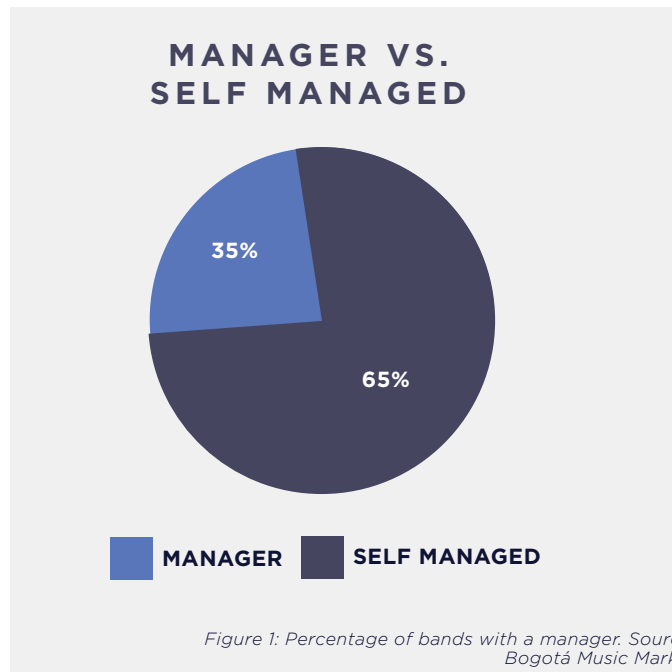
Bogotá Music Market (BOMM) is one of the most important in the country. It aims to offer artists the support and education that they need in order to exploit their talent and structure profitable and sustainable music projects. Its mission is to increase the sector's competitiveness through updates on international trends, primarily in relation to the successful monetization of digital platforms. Therefore, BOMM emphasizes artist education through workshops, training and 1-to-1 counseling. It is carried out by the Chamber of Commerce of Bogotá, and during its 2016 edition, registered over 3000 business meetings between Colombian artists and national and international buyers. Band deals increased from 55% (in the 2015 edition) to 95% (in the 2016 edition) for national bands and from 67% to 82% for the international ones. Meetings increased 53% with respect to the 2015 edition.

2016 was also important to BOMM, as over 44% of its guests were international. The foreign countries with the largest number of representatives are Mexico, the US and United Kingdom. 28% of BOMM guests are festival representatives, while between 8-10% are bookers, managers or record labels. This translates to a marked trend to have guests focused on live music, as it is currently a sector showing growth, and to a lesser extent on content. The estimated worth of transactions from these meetings exceeded 1.8 million dollars.

The event's dynamic consists of talks by experts interspersed with 15-minute concerts performed by bands specifically selected to showcase their music in front of the attending promoters, buyers and journalists.

During 2016, artists such Systema Solar, Mónica Giraldo, Los Rolling Ruana, Urabá Conexión, Aerophon, Árbol de Ojos, Esteban Copete y su Kinteto Pacífico, Oh'laville, Toño Barrio, Cero39, El otro grupo, Okraa, Carlos Elliot Jr and Carmelo Torres were presented. They were chosen from the more than 1,200 bands that applied for the invitation.

BOMM is focused on supporting and furthering artists. It analyzed 200 of the bands preselected by the jury for business training seminars, advising on operations in a cultural market. Out of the total amount of advised artists, 56% have already attended a trade conference, and bands are showing an increased interest in becoming their own managers in order to promote and sell their music more efficiently.



The Bogotá Music Market created a positive balance for national talent. Many international buyers proved to be pleased with the richness and diversity of proposals from the Colombian music industry. One band, Cero 39, will be featured at Glastonbury in 2017 after building a contact with Steve Stavrinides, the programmer of the "The Common" area in the festival. Burning Caravan is another band that found success at BOMM, settling a deal with Andrés Sánchez, the director of Rock in Spanish in Ocesa (México), which saw the band play at the Emir Kusturica concert during the Balkan Fest in Mexico City.

The Ministry of Culture, an important actor in the national industry, through its policy to support musical entrepreneurship, has intensified efforts to coordinate professional meetings with more inclusion of peripheral cities. These cities often struggle to find a place in the capital scenes, and therefore the Ministry has been organizing three professional markets focused on certain regions in the country.

**Contact:** Gareth Gordon (Leader of Platforms, Cultural and Creative Industries and Bogota Chamber of Commerce) at [gareth.gordon@cbb.org.co](mailto:gareth.gordon@cbb.org.co)

**“28% of BOMM guests are festival representatives, while between 8-10% are bookers, managers or record labels. This translates to a marked trend to have guests focused on live music, as it is currently a sector showing growth, and to a lesser extend on content. The estimated worth of transactions from these meetings exceeded 1.8 million dollars.”**

### **MINEC: Mercado Insular de Expresiones Culturales (Cultural Expressions Insular Market)**

MINEC takes place on the island of San Andrés in April. It has seen six editions, seeking to link artists with programmers, businessmen and managers. The event caters especially to reggae, mode up (an urban-style local sound), calypso, mento, dub, ska, zouk, dancehall, soul and R&B. Usually, participants come from the Laso program (a Ministry of Culture program that grants recording and training equipment to communities), as well as from the Caribbean Cultural Market. According to the Ministry, the niche approach around the insular genres and the new urban fusions has proved a “50% effectiveness (...) [where] artists in the 2013 edition received contracts amounting to about 400 million pesos, which benefitted the musicians of the islands”.

Among the achievements mentioned for 2014 are the programming of artists such as Job Saas and Élkin Robinson at Rock al Parque 2014, along with the Noche de Río festival in Barranquilla and the Flower Fair in Medellín. In the 2013 edition, the island received nearly 30 bands from across the country, several experts in Antillian genres, around 20 concert businessmen, managers, producers and agents. Also in attendance were several media representatives, which emphasized the importance of these spaces for artists.

**Contact:** Heidy Freitas, Director at [info@minec.com.co](mailto:info@minec.com.co)

### **MCC: Mercado Cultural del Caribe (Caribbean Cultural Market)**

The MCC is a space to develop a cultural platform. It has seen nine editions in Cartagena and hosted numerous bands with different aspirations and origins. Many trends and fusions converge there, from traditional to urban. While MCC includes many disciplines, it focuses on live music and dance displays as well as the fusion

of the native and afro knowledge, hosting workshops, conferences, panels and management tables. The latest edition played host to the likes of Afrojazz, Bambazulú, Bazarro All Stars, DJ Knox, DJ Sisa, El Caribefunk, Ensemble de Tambores, Irka Mateo, Keemba, La Jagua, Nueva Música Colombiana, Luis Egurrola y Franklin Moya, Open Mind Groove, Quinteto de Cuerdas Babalú, Sinú Sax Quartet, Sonido Libre Colectivo, Tubará, Yeison Landero and Yembelé. The event boasted 4,300 meetings during the trade conferences, 163 showcases, 68 conferences and workshops, 225 national and international delegates representing 24 countries and almost 53,000 spectators.

**Contact:** Rafael Ramos, Director at [mercadoculturaldelcaribe@gmail.com](mailto:mercadoculturaldelcaribe@gmail.com)

### **MMP: Mercado Musical del Pacífico (Pacific Music Market)**

The MMP is a platform that seeks to strengthen the circulation of music in the region and takes place within the context of the Petronio Álvarez Pacific Music Festival. It is organized by the Ministry of Culture and has several national and international partners, such as the United States Agency for International Development (USAID).

During three years, the MMP has provided a setting for meetings and negotiation between artists, managers, programmers and other relevant actors in the sector. It takes place in Santiago de Cali, the capital of the Cauca Valley, one of the four events that integrate the Colombian Pacific region and seek to promote the negotiation, circulation and exchange of experiences between music actors in the Pacific Region. During the latest edition, it hosted 26 bands representing all genres coming from Cauca, Chocó, Nariño and Cauca Valley.

**Contact:** Alexander Jaramillo, Director at [info@mercadomusicaldelpacifico.com](mailto:info@mercadomusicaldelpacifico.com)

### **CIRCULART in Medellín**

CIRCULART is probably one of the first events gathering music professionals. During its seven-year run, it has become one of the most anticipated musical events of the year, a space for networking and knowledge exchange. CIRCULART fills Medellín with music such as jazz, fusion and rock, as different spaces in the town open to the public. This has also extended the event's role beyond a professional meeting point to a space of coexistence, bringing music to uncommon places.

Its latest edition boasted guests such as Robert Singerman, who has represented artists from James Brown to R.E.M. and Fela Kuti. Also in attendance were Camilo Lara from the Mexican Sound Institute and Seymour Stein, founder of Sire Records and a vice president of Warner Bros Records.

**Contact:** Octavio Arbelaez, Director at [octavioarbelaez@gmail.com](mailto:octavioarbelaez@gmail.com)

### **Mercado de Industrias Culturales del Sur (Cultural Industries of the South Market)**

MICSUR took place for the second time in Bogotá and aims to create and consolidate a platform for knowledge diffusion, promotion, circulation and the commercialization of goods and services generated by the cultural and creative industries of South America.

MICSUR is not exclusively musical, instead working with six sectors of the cultural industries:

- Scenic Arts
- Audiovisual
- Design
- Editorial
- Music
- Videogames

Its second edition saw over 3,000 people in attendance representing 12 South American countries, as well as buyers from North America, Europe, Asia and Africa.

According to the Bolivia's Director of Cultural and Artistic Promotion (from its Ministry of Culture and Tourism), the Bolivian delegation generated more than 40m BOB (equal to CAD 7.6m) from its activities at MICSUR. Another immediate achievement of MICSUR was the signing of a frame agreement between the Association of Audiovisual Producers of Cordoba (Argentina) and the Paraguayan Chamber of Cinema and Television Producing Companies (Paraguay).

Statistics for music growth effects are yet unknown, since the 2016 edition just took place in October. The edition featured many Latin American artists, including Miss

Bolivia and Sig Ragga (Argentina), Fernando Milagros and Beatriz Pichi Malán (Chile), Pablo Trujillo (Colombia), Kalamarka and Efecto Mandarina (Bolivia), Bueyes de Madera and Swing Original Monks (Ecuador), Bohemia Urbana, Sixto Corbalán and Pedro Martínez (Paraguay). There was also a contemporary show of Venezuelan sounds presented, featuring the likes of Mónica Navarro and Cuatro Pesos de Propina (Uruguay), Lucho Quequezana (Peru) and the Colectivo Circo Band (Peru).

**Contact:** Adriana González Hassig, Coordinator of the Cultural Entrepreneurship Group of the Ministry of Culture at [agonzalez@mincultura.gov.co](mailto:agonzalez@mincultura.gov.co)

For Canadian independent music companies, especially those more oriented towards indie and indie rock, the gatherings that offer the most opportunities are certainly BOMM and CIRCULART, as they feature a higher concentration of programmers focused on English-language and Anglo-oriented music than similar events.

## 2. RECORDED MUSIC INDUSTRY

Opportunities for Canadian Independent Music Companies in the Colombian Music Market

# 2. RECORDED MUSIC INDUSTRY

### 2.1 Trends

**“According to the Cultural Consumption Survey 2013, 66% of Colombian Internet users usually watch online music videos, and 60% listen to music online. On the other side of the coin, as the survey shows, only 5% of all internet users pay for the music content they access.”**

#### Music taste trends

According to a study of 17 countries (including Colombia) conducted by Havas Sports & Entertainment, Latin pop could be the mostly widely-consumed genre in terms of age ranges. Tropical music, which would include urban scenes such as hip-hop and reggaeton, would come second, followed by electronic music.

According to Jorge Contreras, director of the Colombian division of Havas, streaming and online downloads have provided the increased consumption and variety in means of consumption that have brought in the so-called “Shuffle

Era”. This era is characterized by passionate listeners who consume a wide range of music genres and are eager to discover new music and experiences. This trend towards multi-genre music consumption is so common that 56% of fans listen to at least ten genres. The meaning of music and its place within culture greatly differs for fans depending on their country and age group.

According to the 2015 Spotify charts, in Colombia, Carlos Vives was the most listened to artist, followed by Shakira and Andrés Cepeda. The song “Bailando” by Enrique Iglesias was the most-streamed, followed by Pharrell Williams’s “Happy”.

Bogota listened to more music than any other Colombian city, followed by Medellin, Cali and Bucaramanga. The preferred genres are pop, Latin pop, reggaeton and pop rock.

According to the Cultural Consumption in Colombia Survey, there is still a prevalent percentage of people who listen to vallenato in Colombia, despite a small decrease registered

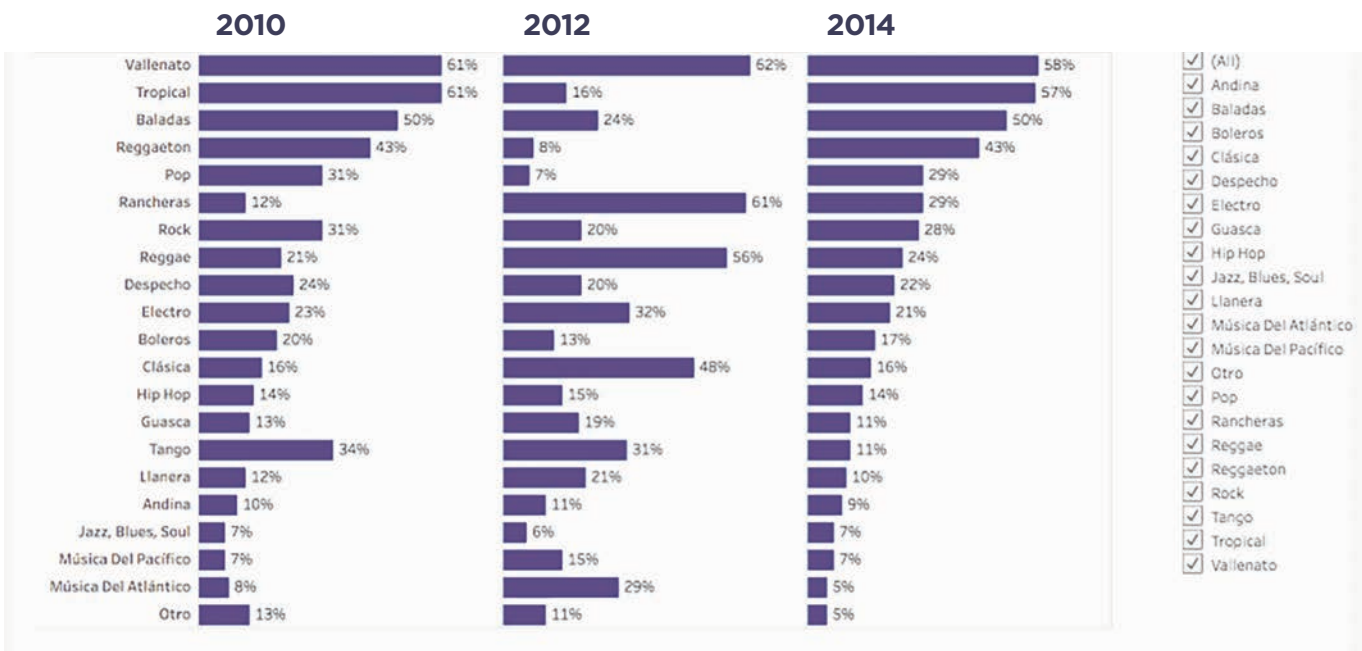


Figure 2: Genre consumption as percentage of listenership-market Source: DANE (2014)



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According to the Cultural Consumption in Colombia Survey, there is still a prevalent percentage of people who listen to vallenato in Colombia, despite a small decrease registered between 2010 and 2014 (61% to 58%). Tropical music consumption also decreased, but a significant rise in pop music should be noted. Exempting a small decrease in 2012, pop consumption jumped from 7% to 29%. Electronic and rock music have kept a steady listenership of between 20%

and 30% of consumers, whilst listenership of traditional Colombian music, such as tango and ranchera, has decreased.

##### Trends in listening habits

Internet use is widespread in Colombia. Its primary functions are for communication and social activities, but accessing entertainment follows shortly after that as the most common activity for Colombian users. Within entertainment, music is the most-accessed content. According to the Cultural Consumption Survey 2013, 66% of Colombian Internet users usually watch online music videos, and 60% listen to music online. On the other side of the coin, as the survey shows, only 5% of all internet users pay for the music content they access.

Another aspect that explains the results of this survey is the fact that listening to music is no longer an activity exclusively carried out through analogue formats such as radio and physical records. Those who are connected to the Internet often mix the Internet and traditional means in order to consume music. In fact, in 2013, 21% of users accessed music exclusively through the Internet, while 57% of users listened to music mixing both the traditional and the virtual means.

Demographically, 53% of people listening to recorded music were female and 47% were male. By age bracket, the group of people who listened to recorded music the most ranged from 15 to 25. Working people listen to recorded music the most, while disabled people listen the least.

#### 2.2 Sales

Colombian bands have started to place their music onto international digital platforms such as iTunes, Spotify and Deezer, among others. Digital music consumption grew 12% in Colombia, according to IFPI.

Recorded music revenue in Colombia grew 16.4% to US\$ 34.1m between 2014 and 2015. This growth can be attributed to the digital sector, which jumped from US\$ 14.3m to US\$ 17.1m during the same period, an increase of 24%. However, physical sales dropped 14% from US\$ 5.7m to US\$ 4.9m, in keeping with global trends.

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## 2. RECORDED MUSIC INDUSTRY

*Opportunities for Canadian Independent Music Companies in the Colombian Music Market*

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**“Recorded music revenue in Colombia grew 16.4% to US\$ 34.1m between 2014 and 2015. This growth can be attributed to the digital sector, which jumped from US\$ 14.3m to US\$ 17.1m during the same period, an increase of 24%.”**

In 2013, the Colombian music market was monopolized by Sony Music, who held at least 70% of sales and is still a truly important actor in the national scene. Between 2011 and 2015, their share grew 380%. Physical sales decreased 6%, but digital was up 120%. Sony Music currently holds the record for the most successful artists in the country and has operated as an entertainment agency for branding opportunities, serving different brands that identify experiences surrounding music as an interesting point of contact with consumers.

In fact, they recently signed an exclusivity contract with Aterciopelados to re-record the classics of El Dorado, an album which made them an international band. They also hold within their catalogue select rights to the works Monsieur Periné, Fonseca, Maluma, Vicente Fernández, Silvestre Dangond and Maluma.

Due the label's efforts in relations and promotion, Sony artists have received many important recognitions such as sales status of gold, platinum and diamond records (10,000; 20,000; and 200,000 copies sold, respectively).

Monsieur Periné boasted a gold record in 2012 with the sales of their album Hecho a Mano and again in 2016 with Caja de Música. ChocQuib Town received a platinum record in 2015 for the sales of their album El Mismo. Bomba Estéreo received a gold record in 2016 for the sales of Amanecer, as well as one in 2013 for Elegancia Tropical. The singles “Somos Dos” and “Fiesta” feat. Will Smith earned a GRAMMY nomination for Best Latin Rock, Urban or Alternative Album and two Latin GRAMMY nominations for Best Alternative Music Album and Recording of the Year.

J Balvin, a reggaeton artist from Medellín, holds one of the most successful sales careers. In 2015, he received a platinum record for the fifth time with the album La Familia, having also been awarded platinum status in Peru and gold status in Argentina, Venezuela, Chile, Ecuador,

Central America and Romania. Manuel Medrano, from Warner Music Colombia, also reached platinum status and has one of the largest artistic projections in the Colombian music scene.

International artists have also been certified with huge sales in the country. Lady Gaga's fourth album, Artpop, received gold status in 2014. Additionally, her single “Applause” reached the top ten list of non-Latin pop songs in Colombia and held the number one position on iTunes in the Andean region for over two weeks. *Sirope*, by Spain's Alejandro Sanz, received a gold sales certification in Colombia in 2015, probably fueled by the four Latin GRAMMY nominations obtained that year.

Austin Mahone was also awarded a gold certification by Colombia in 2016 for his debut album, The Secret. His single “What About Love” achieved huge success in the country, reaching the top 15 global pop charts. “Mmm Yeah”, his collaboration with Pitbull, also boasts a large amount of visits on Youtube and downloads on iTunes, reaching number one in the singles charts of Colombia, Peru and Ecuador. Mexican rock band Maná also reached platinum status in 2016 and were subsequently invited to the Vallenato Festival in Valledupar. As an entity, Universal Columbia awarded five platinum records to the American pop rock band Maroon 5 for the sales of their album “V”.

### Major Label Contacts in Colombia:

Sandra Calle  
Label Manager, Latin Product Andean Region  
Universal Music Colombia  
**Contact:** [sandra.calle@umusic.com](mailto:sandra.calle@umusic.com)

Ximena Vargas  
Latin Label Manager  
Sony Music Colombia  
**Contact:** [ximena.vargas@sonymusic.com](mailto:ximena.vargas@sonymusic.com)

Ángela Sarmiento  
Label Manager, Marketing  
Warner Music Colombia  
**Contact:** <https://www.linkedin.com/in/angela-sarmiento-47a68228>

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#### 2.3 Retail

Physical sales through dedicated music retailers have dropped considerably in comparison to previous years. Although they continue to sell, the arrival of the digital format has extended the sales options and it is very clear that digital sales have increased and physical sales decreased. The national revenue corresponding to the sales of records, tapes and other similar recorded materials significantly decreased between 2005 and 2010. In this period, revenue dropped from \$100 million to \$81 million, which translates to a year-on-year decrease of 19% over the five years.

Nevertheless, record stores continue to survive in Colombia. Spaces like Tango Discos and Discos La Música, stores opened in the eighties, are still selling, although they certainly have needed to diversify their business and commercialize through digital platforms. According to Music Economy Cluster, a nonprofit private entity project of the Chamber of Commerce of Bogota to support businesses, CD units sold in 2011 amounted to 2m, a number which dropped to 1.6m by 2015. However, while other physical formats of music dropped from 400,000 units 2011 to 300,000 in 2012, they then more than doubled in 2014, reaching 1m. They finally stabilized in 2015, with around 700,000 units sold. These physical formats encompass the sales of LPs, cassettes and DVDs, which sheds light on a market of collectors returning to physical formats.

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### PHYSICAL FORMAT SALES

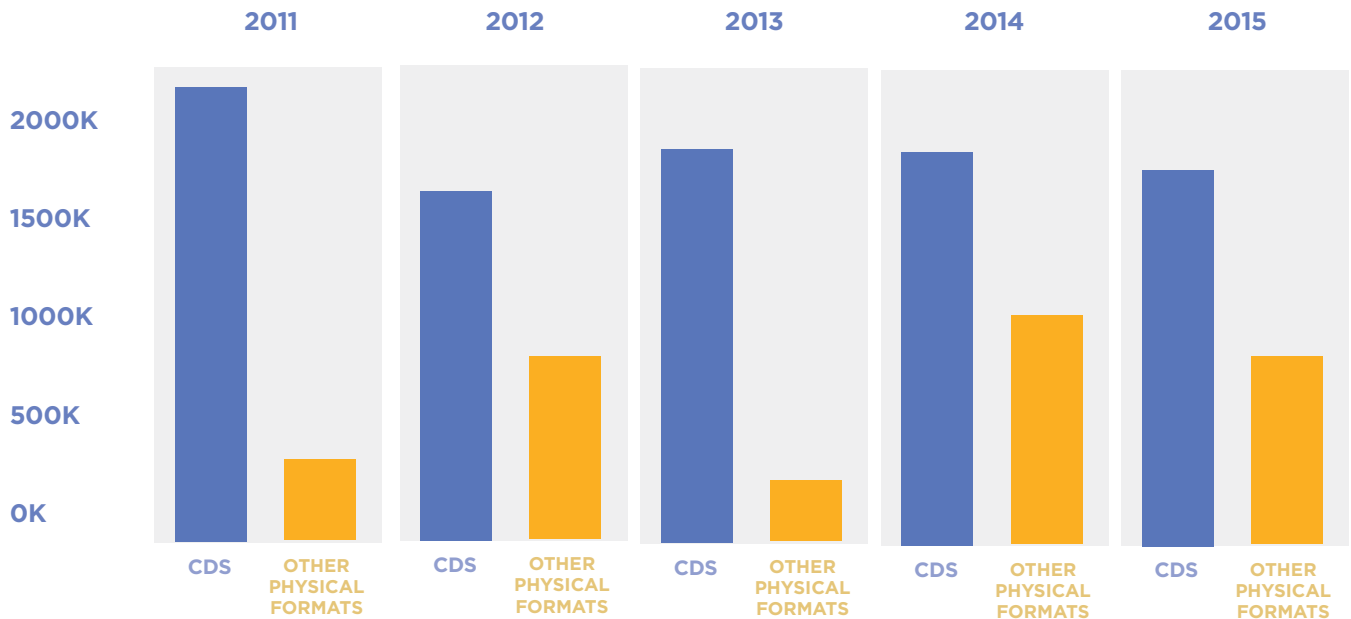


Figure 2: Physical Sales in Colombia Source: IFPI (2015)

Independent spaces have also proliferated, and many small stores dedicated to the sale of collectible records can be found.

Take the example of El Templo de la Música. Located in Bogota, it is a specialist store dating back to 1997 which can be found at a traditional shopping mall in the city centre. It focuses on metal and hard rock, a place where collectors may sell and buy uncommon editions. La Valija del Fuego, opened in 2008, is a well-known bookstore in the city, and anything surrounding the punk culture, both local and international, can be found there.

Discos Muertos was opened more recently (2013) and is focused on the sounds of the Colombian underground. It has a wide selection of vinyl ranging from national hardcore to punk and black metal. They have been working long in favour of the punk culture and music in Bogota, and are part of the Rat Trap creative hub.

In 2014, several other stores were opened, marking an upturn in the recorded music industry and a latent market.

La Roma Records, a subsidiary of the eponymous store in Mexico City, opened in 2014 and has become a space cult for collectors. Along with conducting several activities to activate the independent music scene in the city through its small forum, it specializes in offering re-releases of classic records from bands such as Daft Punk, Nirvana and Pescado Rabioso.

RPM Records also opened in 2014. Apart from offering a wide selection of vinyl albums, ranging from indie to Colombian tropical music, RPM Records offers free “RPM Sessions”, where guests can have a beer while attending a concert from any band in the national or Latin American circuit. Accessories, turntables, local CDs and gifts are sold. It is a space for music and cultural diffusion where showcases, listening sessions, talks, launches and more take place. Its motto is #Apoyolocal (I support the local).

The growth in brick-and-mortar record and vinyl shops is not limited to the capital. In Medellín, fans can find Suro Record. Opened in 2013, its members have been involved

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with the electronic scene in Medellín for several years. Therefore, their musical curatorial has been offering a wide range of proposals, from Shed, Surgeon and Todd Terje to Madlib, Nas and The Clash.

La Caja, SoundBox Records in Medellín opened in 2016, and its music selection mainly centres on rock and roll, although there are also jazz and blues proposals and some classical music. The space is shared with Café Saramago.

Club Vinyl MDE of Medellín (motto: Vinylism-Save the Vinyl) is a collective that holds itself as the rescuer of sound heritage, encouraging a return to the analogue sounds that the so-called 'black gold' offers. On each site, salsa, rock and reggae records may be bought, sold and exchanged, although they also cater lightly to house, techno, chill out, merengue and soundtracks. At Doce, another specialized store in Medellín, tribute is paid to electronic music with names like Rhythm & Sound, A Made Up Sound and Roman Flügel and locally gestated initiatives. They have now expanded towards techno, house and experimental music, which is meticulously curated.

In 2012, Vinilos Rock Medellín and Vinilos Rock Bogotá began as one entity selling vinyl online. Two years later, they opened their first store in Bogotá, and, in 2016, they settled in Medellín. It is an ideal place for classic metal lovers. Vinilos Rock is an authorised distributor for bands such as Kraken, Reencarnación, Blasfemia, Neurosis, I.R.A. and Fértil Miseria. Vinyl can also be purchased here for genres such death, trash, black, punk and hard core.

Cali has a growing, although more discreet, scene which boasts important exponents such as Aurora Record Store, which opened in 2015. Apart from the sale of vinyl, (focused on genres such as salsa, latin beats, soul, funk, jazz, house, techno and disco), Aurora also hosts electronic and salsa parties on the weekends. It also hosts Jazz Tuesdays, providing a space for local musicians to meet up and improvise.

On the coast, there is a classic shop in operation since 1989 called Discos Cartagena. It is one of those little vinyl stores hidden in the town that has stood the test of time. It specializes in vallenato, one of the most-beloved and most-sung genres in Colombia.

Internet record sales have also been increasing, and internet transactions now stand for 2.6% of Colombia's GDP. This has set everybody's eyes on electronic commerce. Research conducted by Visa and Euromonitor estimated that in 2015, sales attributed to virtual stores reached US\$ 3.1m. This is an increase of 18% compared to 2014, when the reported sales reached US\$ 2.62m. At this rate of growth, the national e-commerce sector will overcome the US\$ 5m barrier by 2018.

In 2011, record and single sales amounted to 54,000 and 204,000 units respectively, numbers that have dizzily changed due to the increase in Internet coverage across the country (although the arrival of streaming has not allowed these figures to stabilize). In 2013, 921,000 albums were sold. That number has been decreasing, and in 2014, 819,000 album downloads were registered. In 2015, a further drop to 653,000. Singles downloads, however, increased from 890,000 in 2013 to 979,000 in 2014, suffering a drop to 696,000 in 2015. It is interesting to note that downloads in other formats, such as videos and apps, have shockingly increased. In 2014, only 26,000 units of alternatively formatted downloads were registered, whereas in 2015, these downloads amounted 433,000. Unfortunately, there is no research available to provide details on these downloads, such as which apps are most popular.

**“However electronic commerce in Colombia faces important barriers. One of these is logistics. For example, delivering a product purchased on the Internet to a town in La Guajira may take several days. Another important barrier that prevents online sales expansion is the fear that users have of electronic fraud.”**

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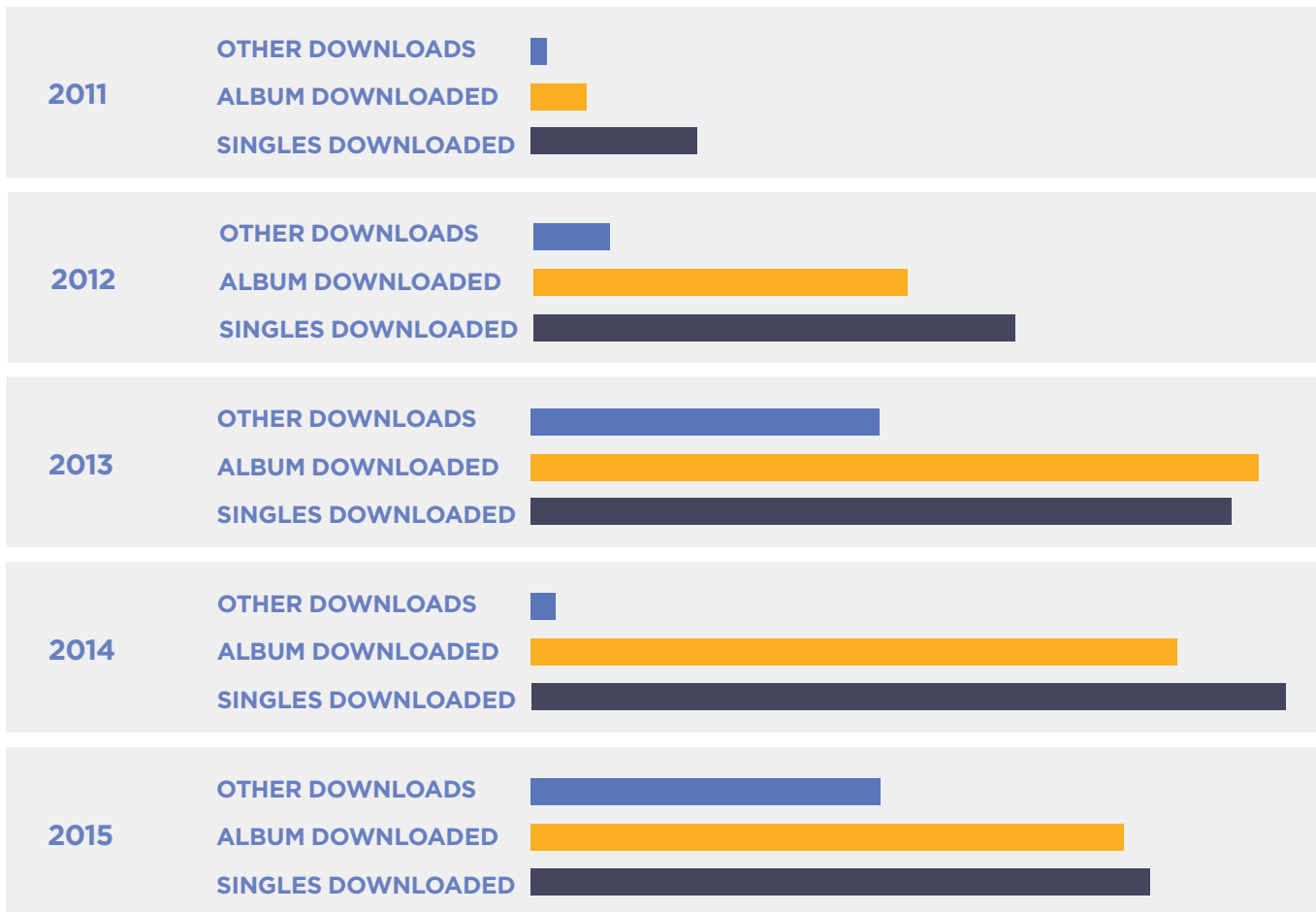


Figure 3: Revenue distribution by types of download  
Source: CCB Music Economy Cluster

However electronic commerce in Colombia faces important barriers. One of these is logistics. For example, delivering a product purchased on the Internet to a town in La Guajira may take several days. Another important barrier that prevents online sales expansion is the fear that users have of electronic fraud. "In Colombia, 90% of payments are made in cash", informs Héctor José García, president of Certicámara, an institution dedicated to working on strengthening the security in electronic transactions.

### 2.4 Mobile

**"Mobile telephone providers have been an important ally in breaking artists through in the Colombian music industry. Tigo (now called Claro Colombia) and Deezer announced an alliance with the market in October 2012, applicable to six countries in the region: Guatemala, Salvador, Honduras, Bolivia, Paraguay and Colombia. It was an innovative**

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**decision, as streaming was just emerging and the companies became the first team of legal music platform and operator to offer it. The agreement allowed Tigo to make mobile telephone plans with 100% legal unlimited music available to customers. This meant a 400% growth in the number of users.”**

In 2014, 14.4 million people in Colombia had a smartphone, while in 2015, that number increased to

16 million. However, only 22% have a data plan or post payment plans, whereas 78% have a prepaid plan, a figure that has not changed in percentage since 2010. Hence, people prefer to continue paying for what they consume.

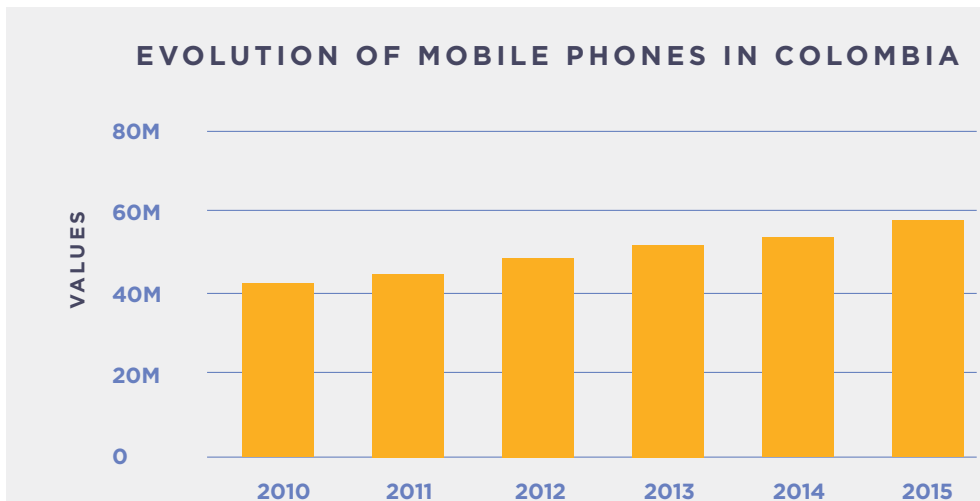


Figure 4: Evolution of mobile telephone lines Source: MinTic (2015)

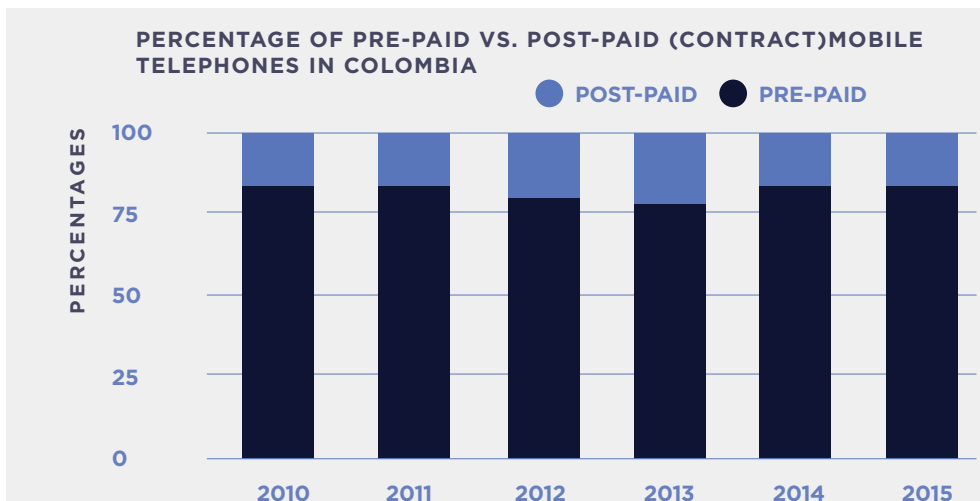


Figure 5: Percentage of post paid vs prepaid mobile telephones in Colombia Source: MinTic (2015)

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Music consumption from mobile devices is a growing trend globally, and Colombia is not far from this. According to a global study conducted by the Interactive Advertising Bureau (IAB), three out of ten Colombians claim they listen to music on their mobile devices. The full study evaluates the trends in music and video consumption through mobile devices in 24 countries. It proves that, in Colombia, as in other latitudes, music videos are the greater preference among users.

The websites with the highest visitor traffic are social networks, email services, information websites and websites to watch and download videos and music. 39% of users navigate using laptops, 23% use smartphones and 3% use a tablet.

Mobile telephone providers have been an important ally in breaking artists through in the Colombian music industry. Tigo (now called Claro Colombia) and Deezer announced an alliance with the market in October 2012, applicable to six countries in the region: Guatemala, Salvador, Honduras, Bolivia, Paraguay and Colombia. It was an innovative decision, as streaming was just emerging and the companies became the first team of legal music platform and operator to offer it. The agreement allowed Tigo to make mobile telephone plans with 100% legal unlimited music available to customers. This meant a 400% growth in the number of users.

Currently, Spotify is seeking further organic growth in Colombia, and thus they are working to reach similar

partnerships with mobile providers, such as that currently held with ETB. The goal of the ETB agreement is to encourage consumption and become more attractive and striking to users. Thus, when signing a particular mobile contract with this telecommunications firm, users will have access to a free year of the "Premium" version of Spotify, gaining unlimited access to over 200 million songs through high-quality streaming.

Of course, there will always be a sector that suffers when another is growing. The ringtone and backtone sector is now on a decline, despite being on the rise in 2013. There is a wide range of ringtones and backtones (tunes that play for a caller when waiting for an answer from the recipient). Ringtones or backtones are usually offered on internet websites, and, for this reason, users must pay to save the work digitally and pay for its public communication. Usually in Colombia, a blank contract for public communication is issued and a percentage on the retail price of each ringtone download is charged. A blank license is also issued for the reported song repertoire, and payments are usually disbursed monthly. During 2011 and 2013, this strategy favoured many artists (almost all of them Colombian regional musicians), and 1,362,000 and 1,508,000 mobile phone personalisation transactions were recorded during the same years, respectively. However, in 2015 this figure considerably decreased to 686,000 registered units, and the trend is following a continued fall.

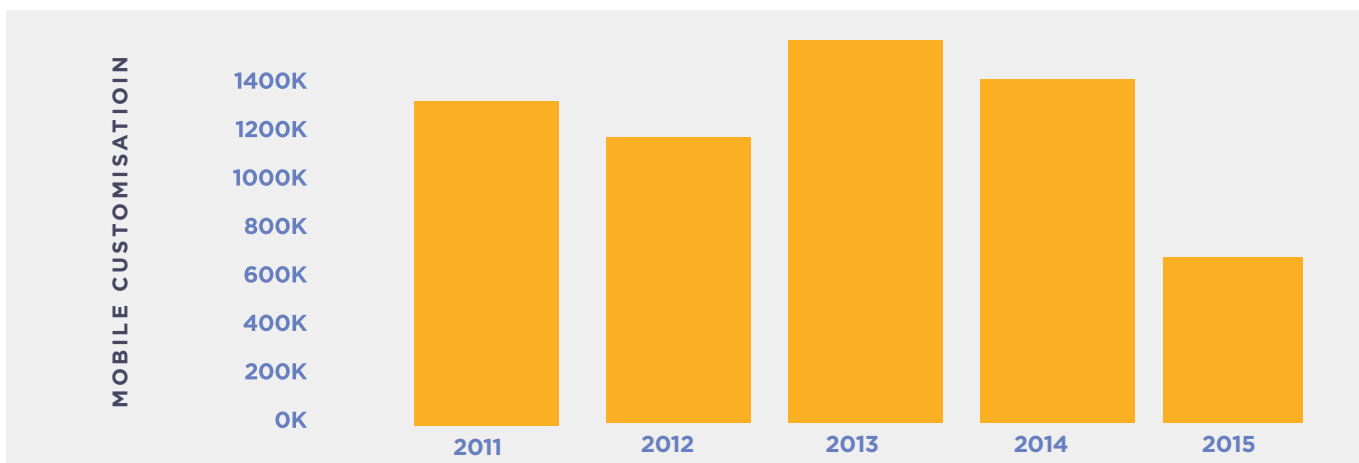


Figure 6: Revenues in the mobile personalisation sector in Colombia (2011-2015). Source: IFPI (2015)



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### 2.5 Streaming

**“Music streaming in Colombia in 2011 only accounted for 5% of revenue in the national music market, translating to less than US\$ 1m. By 2014, after the alliance between Deezer and Tigo was established, revenues from streaming exceeded US\$ 15m (more than 49% of total industry revenue), placing the country in the third position in the region, after Brazil and Mexico.”**

Music streaming in Colombia in 2011 only accounted for 5% of revenue in the national music market, translating to less than US\$ 1m. By 2014, after the alliance between

Deezer and Tigo was established, revenues from streaming exceeded US\$ 15m (more than 49% of total industry revenue), placing the country in the third position in the region, after Brazil and Mexico. According to IFPI, this revenue is divided between paid subscriptions, freemium versions and advertising revenue. As shown in the following graphic, revenue sources have changed in the past six years. In 2013, subscriptions only amounted US\$ 866,000, while advertising revenue brought in US\$ 2,758,000. In 2014, these numbers almost balanced, with subscription revenue at US\$ 5,774,000 and advertising at US\$ 5,371,000. In 2015, this subscription revenue doubled, reaching US\$ 10,050,000, while advertising revenue dropped to US\$ 4,884,000.

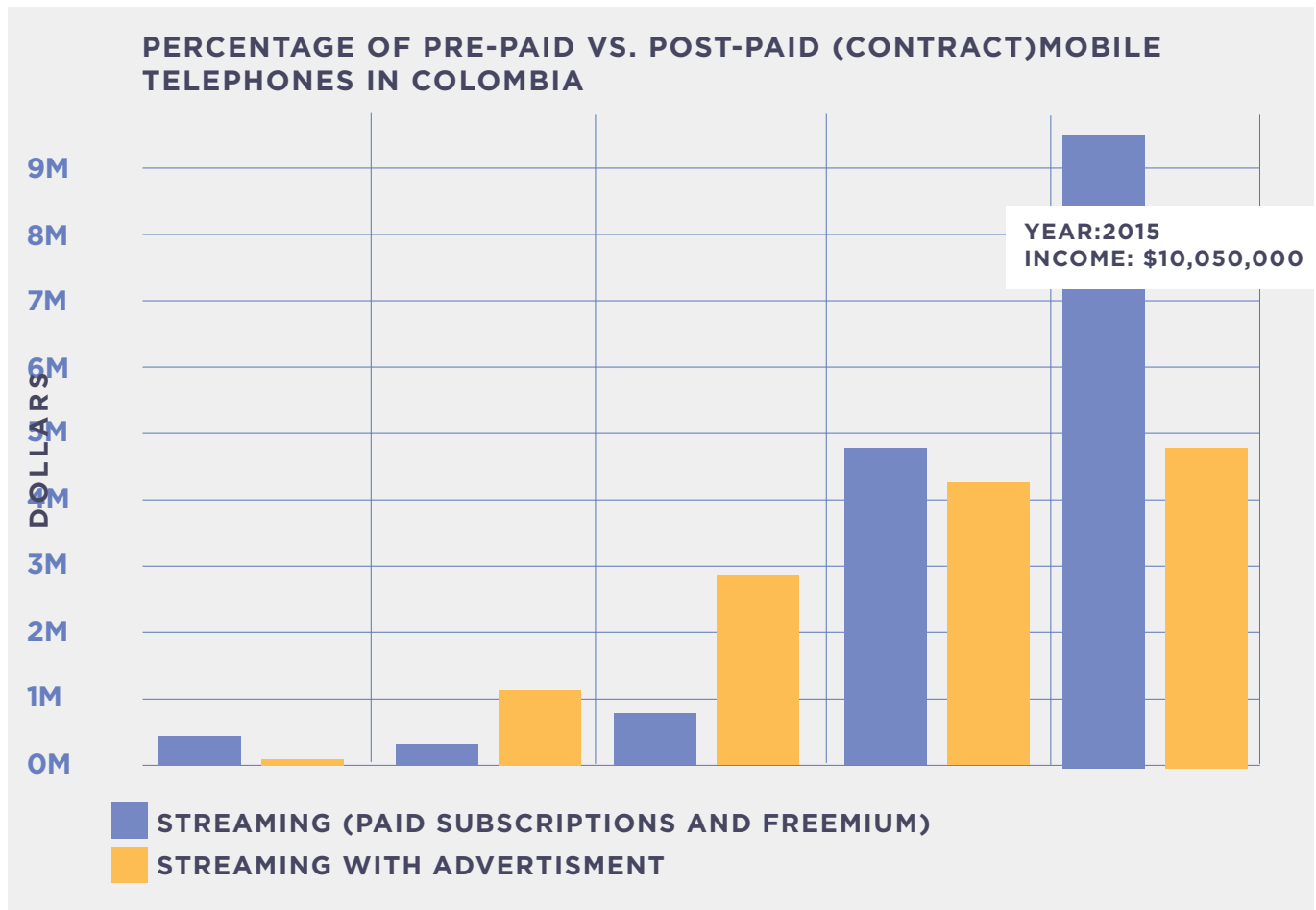


Figure 7: Streaming Service Revenue. Source: IFPI (2015)

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Today, Colombia counts over 1.7 billion songs listened to, led by Deezer's continuous evolution. This is a far cry from other markets, where Spotify is the leader in streaming services. Deezer's catalogue grew from 18m to 36m songs and their main aim has been to support the local industry. Along with Tigo Music, it has supported and received exclusive rights to the works of over 100 Colombian artists. Prominent inclusions in this are: Bomba Estéreo, ChocQuibTown, Juan Pablo Vega, Esteman, Systema Solar, Diamante Eléctrico, Kevin Flórez, Charles King, Herencia de Timbiquí, Pedrina y Río, Manuel Medrano, The Mills and Alex Campos, among others.

Spotify arrived in Colombia in the same year as Deezer, but its growth has not been exponential, and, despite a growth in users, the percentage of paid subscribers is not growing. Currently, it is seeking an alliance with Empresa de Telecomunicaciones de Bogotá, similar to that of Deezer with Tigo, to offer services throughout the country. Additionally, they want to encourage consumption of local works.

In 2015, one of the most consumed artists on Spotify was Carlos Vives. However, the other top positions were occupied by foreign artists, such as Maroon 5 in the second position, Romeo Santos in the third, Calvin Harris in the fourth and Nicky Jam in the fifth position. Shakira ranked third in the category of most listened to female artist in the country.

The top albums were:

1. **Peace Is The Misión, Major Lazer**
2. **PB.DB The Mixtape, Maluma**
3. **Stories, Avicii**
4. **Beauty Behind The Madness, The Weeknd**
5. **Me 4 U, OMI**

### 2.6 Physical and digital distribution

**“The [distribution] company with the greatest presence in the country is Believe Digital, which also offers trade marketing, video management, synchronization, collection of related rights and real time data.”**

According to an analysis performed by CERLAC (Regional Centre for the Book Promotion in Latin America and the Caribbean) concerning the impact of cultural industries

in the country, there are ten companies in the field of distribution in Colombia ranging from large and medium-sized to a group of small distributors. The document differentiates several modalities of distribution: specialized stores, home sales, large commercial areas (supermarkets) and department stores. Some of the companies that still have a strong presence in the physical music distribution market are MTM, La Música FM, Milenium, Discos Fuentes and CD Systems. These wholesalers have their own networks of small distributors. There are also small independent distributors with a limited market share. Due to the high levels of concentration, the leading companies have strong negotiating power with the producers and great control over prices. In some cases, there are exclusivities between producers and distributors, mainly for catalogue music.

Producers give discounts to distributors, an average of 16%. Larger distributors offer retailers an average 11%, while supermarkets receive 15%. The lowest prices for products in the market are offered by the large supermarkets (5% lower than those offered by specialized stores).

With all the changes in the music industry, digital distribution companies are becoming stronger, and, although many of these firms are transnational, like The Orchard or CD Baby, some have decided to open their own offices in Colombia or form partnerships with local companies in order to increase their market. According to an analysis performed by the Chamber of Commerce of Bogota sampling 200 of BOMM's attending artists, most artists prefer digital distribution.

According to further BOMM data, the company with the greatest presence in the country is Believe Digital, which also offers trade marketing, video management, synchronization, collection of related rights and real time data. Other companies with significant presence in Colombia are the Peruvian platform Bquate, CD Baby and OneRPM. Bquate is in partnership with the record label Árbol Naranja, and M3 Music is now one of the official intermediaries of The Orchard. Thanks to this alliance, M3 Music provides a service called Digital Label, which boasts a catalogue of over 30 signed Latin American artists. The artists' music repertoires are available through all the music streaming services in the digital world.

ONErpm began Colombian operations in January 2016, opening offices and constructing offers beyond adding

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music to streaming platforms, such as marketing support, detailed analytics, monthly reports on uploaded music, video monetization and YouTube channel management. The working team consists of around five people in Bogota and about 700 local bands and record labels.

YIMUP is another popular platform in the region. It has established itself in its five years of operations as Google's cloud platform for emerging artists in Latin America (not only musicians, but writers, illustrators and audiovisuals), with a model that seeks to connect artists to brands willing to launch "branded content" campaigns. These campaigns are based on offline formats such as "download cards", which may be mass-distributed to make entertainment content available to audiences in physical formats with the ability to later download the content online, integrating interactivity components. To date, YIMUP has held this strategy for over 1,000 emerging artists in Latin America and has also developed successful "branded content" campaigns for several clients, such as SabMiller, Águila, Néctar, Jägermeister and Publicaciones El Espectador, among others.

### Streaming Contacts in Colombia

Diego Maldonado  
Representative  
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Juan Manuel Quiroz / Angélica Acosta  
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[management@arbolnaranja.com](mailto:management@arbolnaranja.com)

### 2.7 Independent Recorded Industry

The music industry has changed, and Colombia is not unaware of the emerging processes taking place in the sector. Although the major companies entered during the industry's 'boom' period, since 1997, the balance between majors and indies stabilized. Between the format crisis of CDs and the arrival of new technologies, a new paradigm of creation, distribution and music diffusion was born. This has clearly been an important success factor for current Colombian music, strategically positioning several artists who represent the country's talent. A good part of this is due to several record labels, most of which are located in the country's most important cities, which have served as a catapult for many artists.

One example is Llorona Records, one of the most productive projects in Colombia. It is a recording studio that also works as record label and platform for the management of cultural projects. Llorona was created in 2007 and has since been the ultimate and fundamental bridge to creating dialogue between the island music of artists such as Elkin Robinson and Bertha Hooker and what enters the local circuit. Some of the albums that they have edited are *Así tocan los indios* by Los Gaiteros de San Jacinto, *Come 'Round* by Elkin Robinson and a Cartagenean hip hop compilation album called *La otra voz*, among other traditional and vanguardist folklore hits. Currently, its catalogue is led by Los Gaiteros de San Jacinto, Elkin Robinson and Mister Gomez Sound System.

**Contact:** Eddy Gómez, Project Director  
([llorona@lloronarecords.com](mailto:llorona@lloronarecords.com) or  
[eddy@lloronarecords.com](mailto:eddy@lloronarecords.com))

Recently, Palenque Records celebrated its 20th anniversary. This record company has been a key element in protecting the legacy of the Afro Colombian music and gives deserved recognition back to some Caribbean music masters. From its creole champeta compilations to the sound registers of bands as important as Sexteto Tabalá or Las Alegres Ambulancias and producing documentaries that immortalize

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its history, Palenque Records is one of the most important points of Colombian musical reference. Its catalogue holds works from the great Batata and his Rumba Palenquera, as well as Oriki Tabalá, Las Estrellas del Caribe, Simancongo, Son Palenque and Abelardo Carbonó, among others.

**Contact:** Lucas Silva, Founder  
(palenquerecords@yahoo.com)

Polen Records is a record label that, since 2006, seeks to give a platform to independent Latin American sounds. It was born from an idea by musician Lucas Guingue and producer Felipe Álvarez with the purpose of pressing the kind of music that did not seem to have room in the market. They began with *Los Días Adelante* by Bajotierra, EP Vol.1 (which started the career of Bomba Estéreo) and *Somos Pacífico* by Chocquibtown. Currently, refreshing and vanguardist pieces of the alternative scene, such as *Crew Peligrosos*, *Mitú* and *Cero39*, are part of the label.

**Contact:** Felipe Álvarez, Director  
(felipe@polenrecords.com)

La distritofónica is a label that, since 2004, has become a meeting point between coastal and interior traditional music languages, along with jazz, rock or electronic. It has been the cradle of bands that have given an aural identity to the capital of Colombia. They represent Meridian Brothers, who have taken cumbia, salsa, champeta and other tropical rhythms to psychedelic levels with surrealistic lyrics. Also in the label's catalogue are Ricardo Gallo Cuarteto (one of the best bands to fuse traditional languages with avant-garde jazz), Inés Granja, Pedro Ojeda, Asdrúbal and La Revuelta, among others.

**Contact:** Alejandro Forero

Festina Lente launched in 2009, ever since the release of the album *Meleyólamente* by pianist Ricardo Gallo and guitarist Alejandro Flórez. They have specialized in free jazz and folk, building up a catalogue that both recognizes and pushes Colombian music boundaries.

Música Corriente is a Medellín-based label founded in 2013 with the clear goal of helping their artists record albums, catering to those with a well-developed music proposal rather than those seeking funding. They are affiliated with any and all music circuits and welcome musicians with unique proposals. They hold a catalogue of more than ten projects by experimental genre bands such as Mr. Bleat, Parlantes, Metropolitón, Gordos Project and Billy Taller 7. They are

currently working on *Discos Inauditos*, a project that links one of their bands with a visual artist and a writer in order to edit a product in LP format.

**Contact:** Juan Camilo (musicacorriente@gmail.com)

Incorrecto is a magazine in addition to a record label, focused on South American acts. Its catalogue boasts the likes of Santiago Navas, Jardín Láser and La Sonora Mazuren. They have launched two EPs: *Arrullo de Corto Aliento* by Jardín Láser and *Problemática* by Santiago Navas. They have also recently completed their first national tour, showcasing their bands in Cali, Salento and Santander de Quilichao.

Moebius specializes in Antioquia-area rap. What began as a recording studio in 2008 grew to serve as a record label, releasing or editing albums from Gordo Sarkasmus, MC Páez, No Rules and Doble Porción.

Blasting Records is a label catering to the death metal scene. They organize the Grind Death Fest in Bogotá, which has already seen 15 editions, among other extreme parties. Some of the bands signed by the label are Nonsense Premonition, Amputated Genitals and Carnivore Diprosopus. Blasting works to champion a very small but powerful scene.

Sonidos Enraizados is a label focused on representing the depths of the Caribbean, Antioquian Uraba, Pacific, Eastern Plains and Putumayo regions. This label, dating back to 2012, works in particular with recordings made the most on site as possible.

**Contact:** Lucía Irene Ibáñez Salazar, Director  
(sonidosenraizados@gmail.com)

Noise or Die, a label true to the DIY spirit, is located in the flea market of San Alejo in Bogotá. Its aim is to diffuse the works of grind core, crust core and hard core punk bands. The label organizes concerts and makes buttons, t-shirts and caps. They are in charge of distributing the material of bands such as Bestiário, Chulo, Nastiness, Mohan, Los Maricas, Los Goul Espantos and several other extreme bands of national and foreign origin.

Barrio Colombia is a solidary label around which artists paying tribute to traditional music have gathered. Artists such as Pala (one of the most important singer-songwriters in the country), Andrés Correa and Alejo García are with this label. They have developed a network to strengthen links with Argentina, Peru and Venezuela.

**Contact:** Alejo García (alejogarcia@barriocolombia.org)

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### *Opportunities for Canadian Independent Music Companies in the Colombian Music Market*

Founded in 1999, Laguna Records follows the work of producer and composer, Nicolás Uribe. It has specialized in making soundtracks for audiovisual media, cinema, theatre and television and currently holds the editorial catalogue “Situaciones y locaciones”, focused on promoting the synchronization of artists and bands for production companies, films, television and general ads. Laguna Records has successfully produced soundtracks for many television series, such as La Niña, La Ronca de Oro, El Joe La leyenda, La Reina del Sur, Perro Amor, Pasión de Gavilanes and many others. It has also produced the soundtracks for films such as San Andresito, Soñar no cuesta nada, El Colombian Dream, La historia del baúl rosado and El ángel del acordeón, among others. CD recordings and several tours with La Ronca de Oro, Pasión de Gavilanes, El Joe La leyenda and Perro Amor have also been produced.

**Contact:** Nicolás Uribe, Director  
([nuribe@lagunarecords.co](mailto:nuribe@lagunarecords.co))

Tambora Records is an independent Colombian label focused on developing new music that incorporates Colombian music traditions. It is the record label of Tribu Baharú, Colectro, Redil Cuarteto and Tubará, among others.

**Contact:** Juan Sebastián Bastos, Label manager and music producer ([info@tamborarecords.com](mailto:info@tamborarecords.com) or [booking@tamborarecords.com](mailto:booking@tamborarecords.com))

### 2.8 Government strategies

Since 2012, the Ministry of Culture in Colombia has operated its music internationalization strategy, a policy to strengthen the cultural and creative industries in the country, through the Cultural Entrepreneurship Group. This is developed in association with Procolombia and the Secretariat of Culture, Recreation and Sport of Bogota through the program Bogota City of Music, as well as the Latin American Cultural Producers Network, RedLat. Redlat's purpose is to promote the Colombian music industry in the most important sector trade fairs in the world, joining human, technological and financial efforts in order to articulate and consolidate the promotional strategies for the circulation of the Colombian artistic product.

### 2.9 Opportunities for Canadian independent companies

Colombia is a country that is currently experiencing a boom

of fresh and innovative music. Pacific music, in particular, has risen to combine urban, rock and pop music with the traditional folk sounds of this area of the country. This has favoured many successful bands such as Chocquibtown or Bomba Estéreo, who have made their way among the greats of pop, such as Juanes and Shakira. This music juncture in the country has been backed by many government organizations, along with a powerful ecosystem that is betting on innovation in the sector. Thus, independent record companies and multi-service firms have increased. Companies dedicated to integral artist development are also on the rise, usually managed by young heads who are willing to bet on new sounds.

In order to work in Colombia and access the market in the country, it is important to work closely with a partner who knows the scene and is able to assist in different topics.

Listeners are changing their habits, and the dominance of native genres such as vallenato has been decreasing, while streaming of Anglo indie, rock and electronic music is increasing. Ranchera and tango music genres have also decreased, which shows that young people are the ones currently deciding what genre will be the most consumed. This presents an opportunity for international music to infiltrate the market, as young people are more open and adventurous in their tastes. As will be depicted further in this report, festivals showcasing Anglo-oriented rock, indie and electronic music are gaining more prominent positioning within the market and are a good opportunity to present international bands. The programmers of these festivals often attend business trade fairs, mainly BOMM and Circularart, which are the ones that work with the greatest amount of international content.

**“Listeners are changing their habits, and the dominance of native genres such as vallenato has been decreasing, while streaming of Anglo indie, rock and electronic music is increasing. Ranchera and tango music genres have also decreased, which shows that young people are the ones currently deciding what genre will be the most consumed. This presents an opportunity for international music to infiltrate the market, as young people are more open and adventurous in their tastes.”**

## 3. LIVE MUSIC

Colombia experienced an increase in the sale of production services and the presentation of live shows between 2005 and 2010, passing from 432bn Colombian pesos (around US\$ 135.8m) to 555bn pesos, a 28% increase in the sector, equivalent to US\$ 174.4m.

Fine and scenic arts are also included in official calculation of the production and presentation of live shows. However, the technical group of the Ministry of Culture and the National Administrative Department of Statistics (DANAE) specified that 80% of revenue from this sector came from the division of live music shows. The transformation Colombia underwent between 2012 and 2015 in terms of live show production is significant. In Bogota alone in 2012, live music events were concentrated around the months of August, September, October and became less frequent in December, with

September showing a peak offering of 166 paid music events.

**“Colombia experienced an increase in the sale of production services and the presentation of live shows between 2005 and 2010, passing from 432bn Colombian pesos (around US\$ 135.8m) to 555bn pesos, a 28% increase in the sector, equivalent to US\$ 174.4m.”**

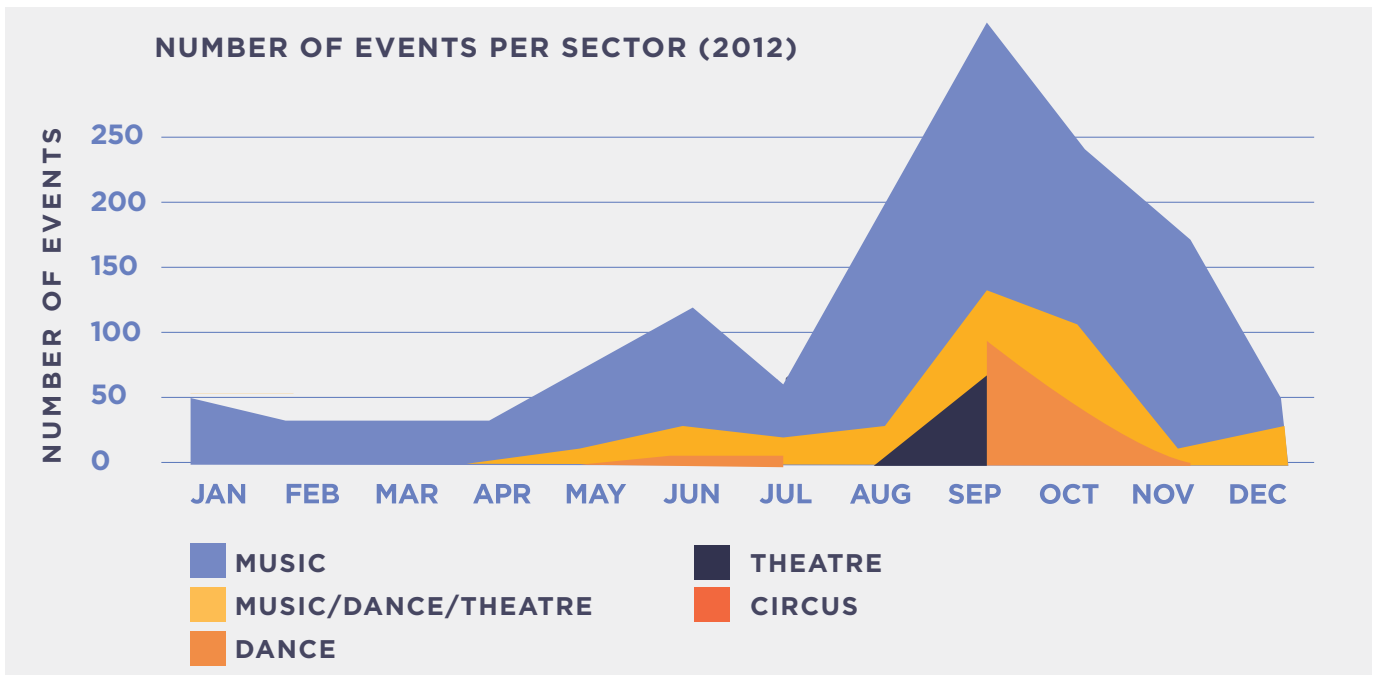


Figure 8: Number of shows per discipline produced in Colombia according to parafiscal contribution of ticket sales in 2012  
Source: Portal Único de Espectáculos Públicos de las Artes Escénicas

**3.LIVE MUSIC** *Opportunities for Canadian Independent Music Companies in the Colombian Music Market*

In 2013, many more events were performed than during the previous year, and graphics show three peaks of 128, 153 and 150 events in May, August and November, respectively.

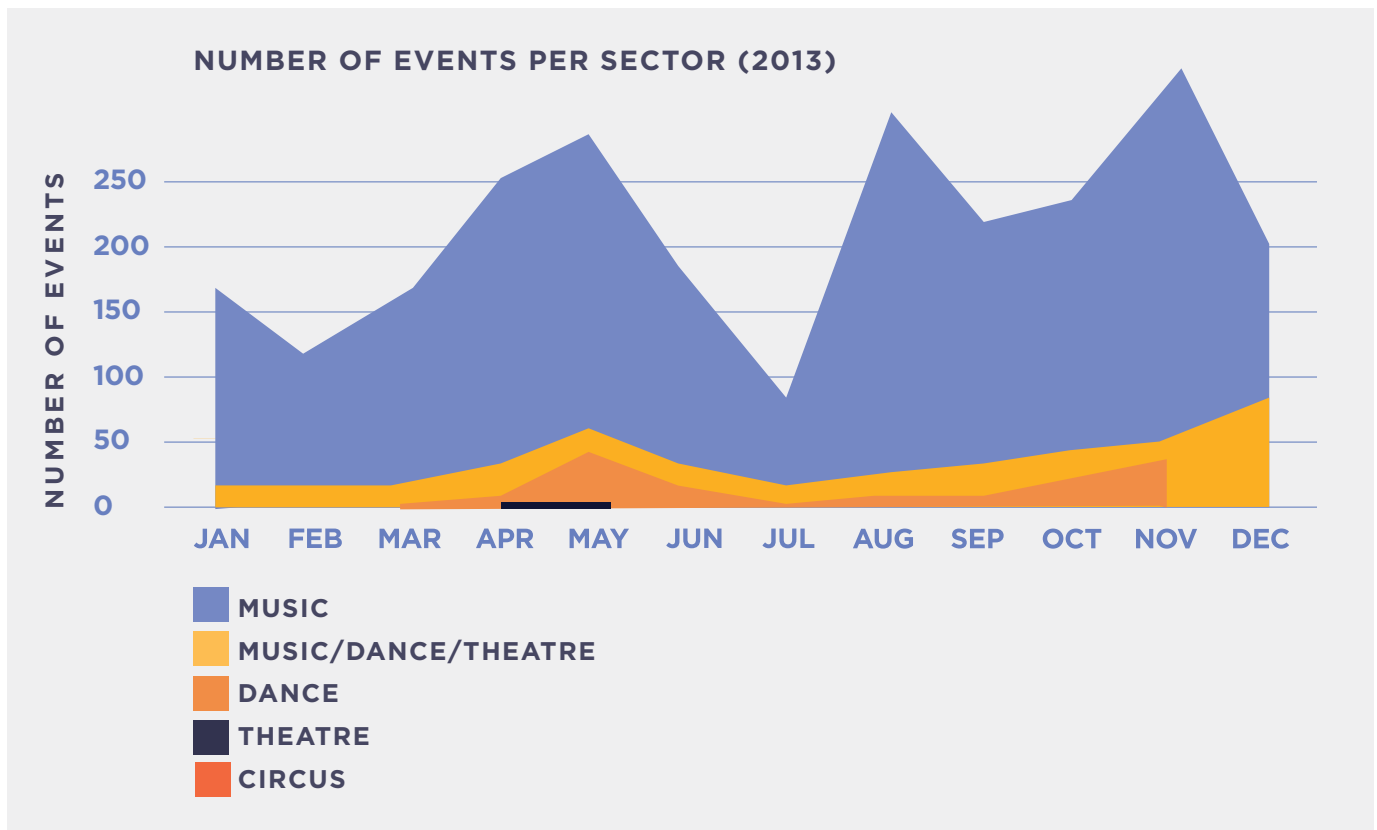


Figure 9: Number of shows per discipline produced in Colombia according to parafiscal contribution of ticket sales in 2013  
 Source: Portal Único de Espectáculos Públicos de las Artes Escénicas

**3. LIVE MUSIC** *Opportunities for Canadian Independent Music Companies in the Colombian Music Market*

In 2014, the production of music shows doubled in Bogota during the month of September, where 256 paid music

shows took place, while in months such as May and March, the trend of hosting around 150 music events was maintained.

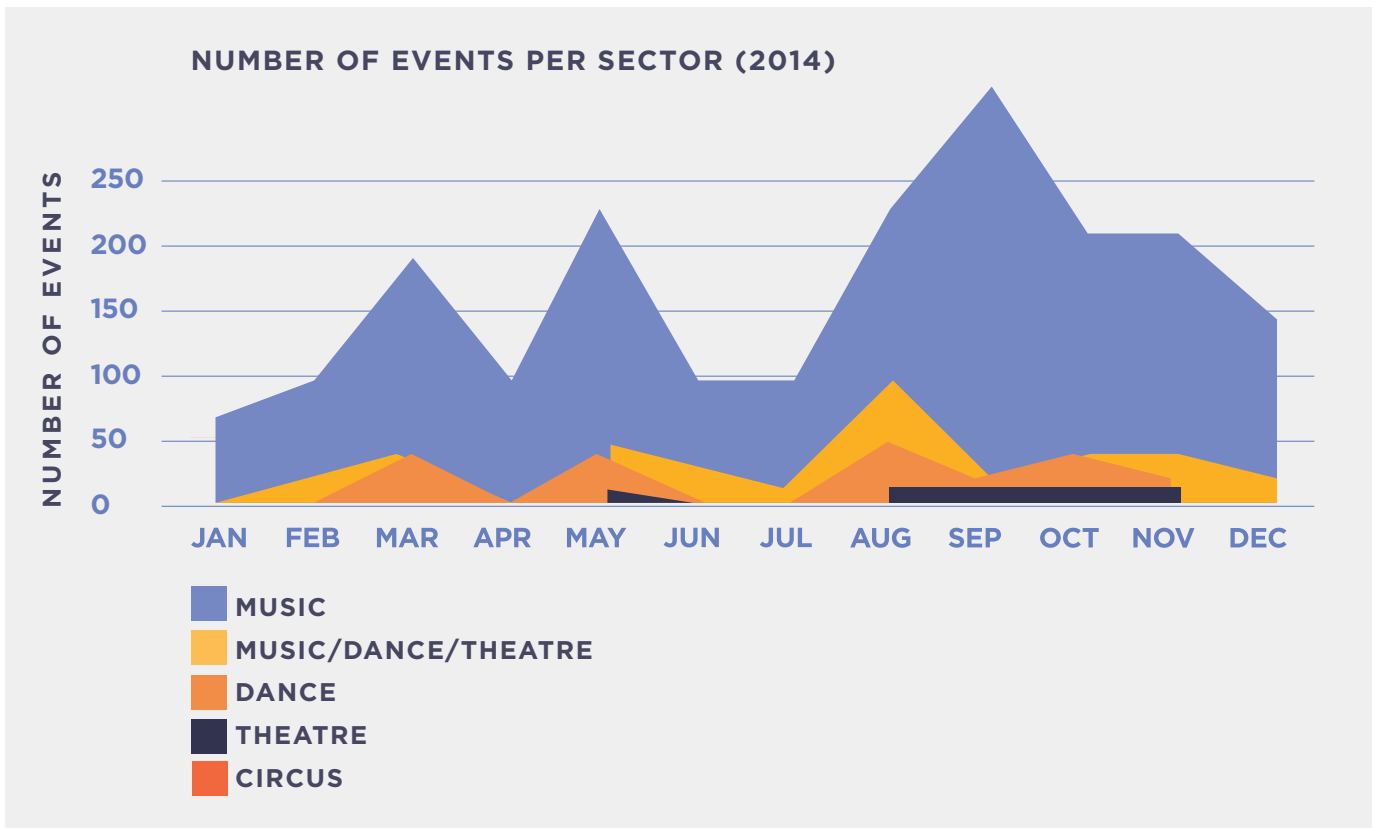


Figure 10: Number of shows per discipline produced in Colombia according to parafiscal contribution of ticket sales in 2014  
 Source: Portal Único de Espectáculos Públicos de las Artes Escénicas

“In 2015, Bogota experienced a much more uniform [live music] offer throughout the year, and an important increase is shown in months that usually lack musical offers, such as January, February and July. The months with traditionally more events are September, October and

November. In 2015, these months had 186, 205 and 150 events, respectively.”



### 3. LIVE MUSIC *Opportunities for Canadian Independent Music Companies in the Colombian Music Market*

In 2015, Bogota experienced a much more uniform offer throughout the year, and an important increase is shown in months that usually lack musical offers, such as January,

February and July. The months with traditionally more events are September, October and November. In 2015, these months had 186, 205 and 150 events, respectively.

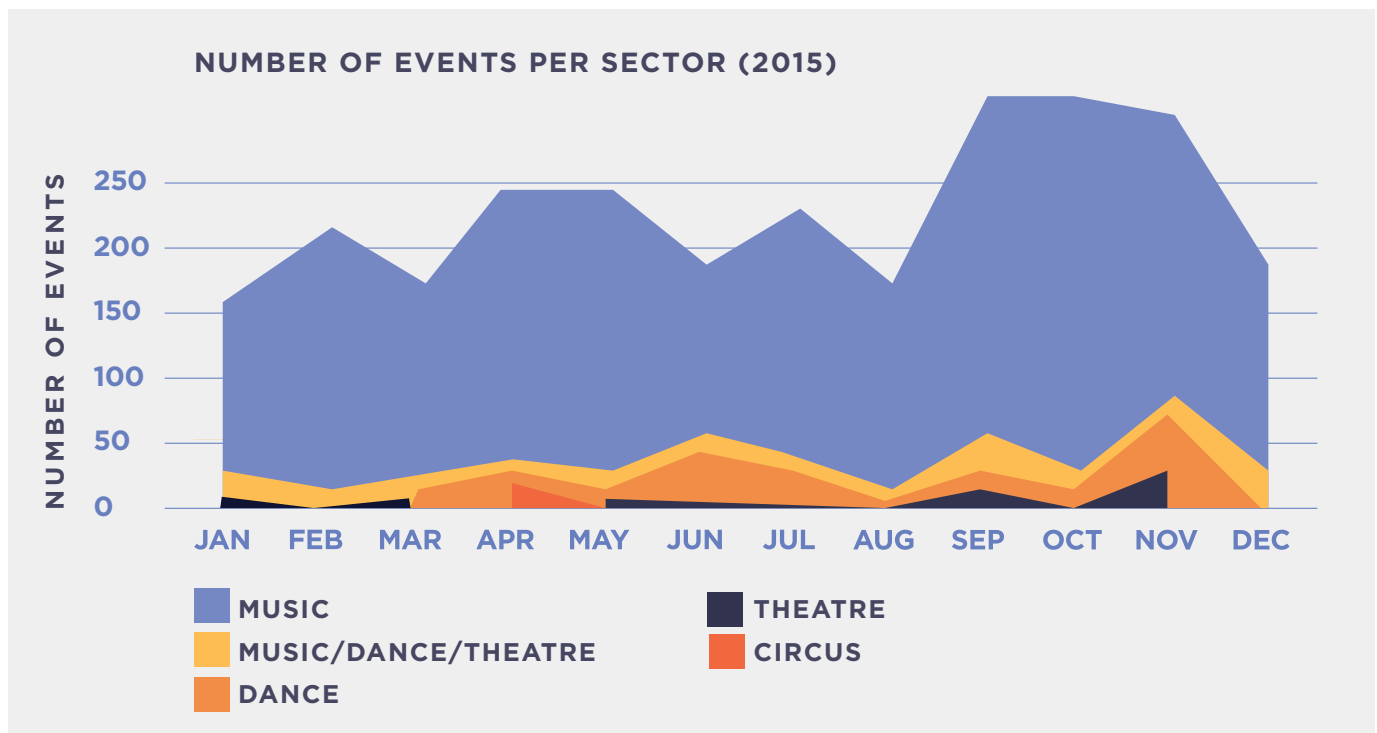


Figure 11: Number of shows per discipline produced in Colombia according to parafiscal contribution of to ticket sales in 2015

Certainly this is the case for Bogota, as the entertainment and cultural industry is still very centralised in the capital. However, the increase in competition is forcing promoters to seek unexploited niches and thus, in the past two years, the number of festivals in unconventional areas like the Atlantic and Pacific Coasts has been increasing.

An important portion of the activities related to the scenic arts in Colombia, and generally in Latin America, is generated in informal spaces, allowing an accumulation of knowledge and cultural exchange that constantly nurtures the quality and originality of the region's works, although they escape figure data and monitoring.

Additionally, scenic arts are locally sustained, as it has remained a productive sector and allowed the creation of jobs less likely to be susceptible to global economy

fluctuations. It should be mentioned that activities related to this sector in the region are intensive in workforce, while not in capital, making this a sector with great potential for job creation.

Thus, most of shows and events are organised by micro-enterprises. Almost 90% of those organising events are companies with less than 10 workers and total assets of less than 500 SMMLV (minimum legal salary in Colombia) excluding housing. 71% out of these companies are importers, 28% are importers and exporters and only 0.7% are exporters.

Most of these companies are located in Bogota and occasionally move to other areas to generate events and concerts. As shown in the following table, most companies occasionally conduct events. The greatest concentration

is in Bogota and Antioquia (Medellin), while in the other important areas such as Santander (Bucaramanga), Caldas (Manizales), Atlántico (Cartagena) and Bolivar (Santa Marta), there is almost no presence of permanent companies.

years, the number of festivals in unconventional areas like the Atlantic and Pacific Coasts has been increasing.”

“Increase in competition is forcing promoters to seek unexploited niches and thus, in the past two

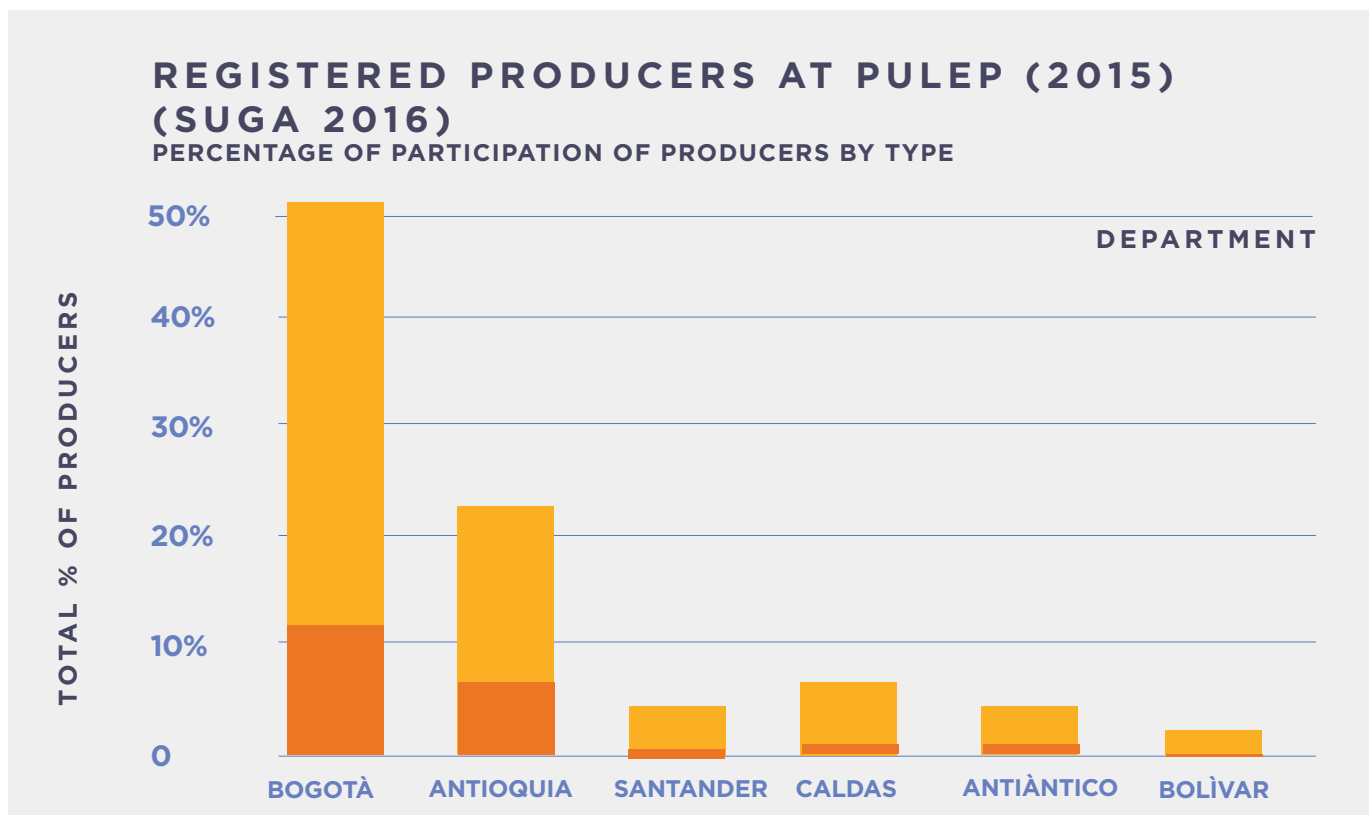


Figure 12: Producers in the music sector registered by the Ministry of Colombia differentiated by occasional (light orange) and permanent (dark orange) activity Source: Portal Único de Espectáculos Públicos para las Artes Escénicas

The big events companies in Colombia are multinational firms that have recently focused on the national market. For example, **Ocesa Colombia**, created in 2009, is a Colombian company, part of the Mexican multinational corporation Ocesa (with more than 20 years of experience in the field of entertainment and culture) and the CIE group. Ocesa Colombia has organised shows for artists such as Quidam and Varekai of Cirque du Soleil, Britney Spears, Lady Gaga, Madonna, The Jonas Brothers, Enrique Bunbury, Andrés Calamaro, Seven Fingers, the Madagascar live musical, César

Millán, Justin Bieber, Black Sabbath and One Direction.

In 2012, they grossed 484m pesos with Lady Gaga and 776m pesos with One Direction. The last season of Cirque du Soleil almost grossed 2.6bn pesos.

The other multinational competing with Ocesa in Colombia is **Move Concerts**, part of the Evenpro group, which has brought to the country international artists such as Metallica, Iron Maiden and Katy Perry. Move Concerts is a leading

company in the field of mass entertainment in Latin America, with presence in the United States, Argentina, Mexico, El Salvador, Puerto Rico, Dominican Republic, Costa Rica, Panama, Ecuador, Brazil, Colombia and Venezuela.

Both companies are already working on several projects together. For example in 2016, they partnered up in order to bring The Rolling Stones with an investment of US\$ 4.5 million. This figure exceeds that of Paul McCartney, who earned around US\$ 2.7 million in April 2012.

**Showbusiness & Entertainment** is a private company founded in 1995. They are responsible for concerts by artists such as Papa Roach and Laura Pausini, although they were forced to cancel the latter.

**Ricardo Leyva** is another important promoter of great artists such as Ricardo Arjona. However, despite managing many pop, reggaeton and vallenato concerts, he has been losing credibility due to many date cancellations. Even so, he organises events in Bogota and Medellin, where he is able to gather more than 80,000 people and sell out events.

Other important event producers in Colombia are government or decentralized agencies, like the Medellín Convention & Visitors Bureau, which is a private non-profit foundation in charge of promoting Medellín and Antioquia in the national and international markets. They organise, along with the Town Hall, important events such as the Fair of Flores in Medellín. This is a massive traditional event that takes place every year for ten days in the city of Medellín, Colombia. This festival is the most emblematic celebration in the city, and may be equated with Carnival in Rio de Janeiro, Oktoberfest in Bavaria, Germany or the Fair of Manizales in Colombia.

During **Faire of Flores**, the city offers a wide range of events and shows, like large concerts by national artists such as Bomba Estéreo, ChocQuibTown, El Grupo Niche, J. Alvarez, Pipe Peláez, las Hermanitas Calle y Fernando González and Combo Qué Nota. The international stage is not considered a very important element, but it does exist. For example, in 2016, Madou Zon Family (one of the most internationally famous African bands), the Jamaican Brushy One String and Roberto Hernández (lead singer of Cuban Van Van) were there. According to a press release from the Town Hall, 300,000 people took place in the opening days alone. The Flower Square, the big novelty of this year's edition of the Fair, exceeded the attendance expectations. A preliminary

balance would show that more than 160,000 people visited it, according to Natalia Martines, the Fair manager. She also said that, although 10,000 people were expected per day, on Saturday, 60,000 attended.

**“The Bogota Town Hall also promotes national and international music and organises many events in the city, like Festivals to the Park, a project that depends on IDARTES (Distrital Institute of the Arts). For more than 20 years, they have been organising one of the most emblematic free rock festivals in Latin America: Rock to the Park.”**

The **Bogota Town Hall** also promotes national and international music and organises many events in the city, like Festivals to the Park, a project that depends on IDARTES (Distrital Institute of the Arts). For more than 20 years, they have been organising one of the most emblematic free rock festivals in Latin America: Rock to the Park. It began by supporting the national rock scene and now has become a convergence of music showcases. In the latest edition, 61 international, national and local bands played at the Simon Bolivar Metropolitan Park. Among the headliners were Los Nastys, British band GBH, Las Manos de Filipi and Todos tus Muertos. Sinergia, Roro y Ariel, Deafheaven, Baroness, Easy Easy, Caramelos de Cianuro and Suicidal Tendencies were also there. The Rock to the Park festival has an academic component, where more than 700 people attend. Almost 240,000 people attend the festival in total, which is free.

Other park festivals that the institution organises are Jazz to the Park, Salsa to the Park, Hip Hop to the Park, Dance to the Park and, recently, Colombia to the Park (13,000 attendants) where it is sought to create a space for local and traditional sounds fusing with contemporary sounds. This year, due to the election of the new mayor, they decided to cancel Jazz to the Park, Salsa to the Park and Colombia Suena individually in order to group them into one format : Bogotá Suena. This massive event gathers the best of the local music offer across several stages throughout the town. The venues include the Jorge Eliécer Gaitán Theatre and the Simon Bolívar Park. In order to democratize the cultural offer this year, the Festival was extended to other city points. Bogotá Suena presented the regional music of Colombia, salsa and jazz in different spaces for all audiences. The festival hopes to be a family-oriented place.

Even with big events like these, attendance levels are still

below the average when compared to other countries in Latin America with longer traditions of hosting such large-scale shows. Festivals like Bogota's Estéreo Picnic have, over three days of activity, more than 50,000 attendants on average, whilst a similar festival in Brazil, Argentina, China or Mexico will gather up to 180,000 attendants. The offer in Colombia of live diffusion and mass consumption platforms is optimal. However, the low influx they have is paradoxical.

The independent scene, on the other hand, is doing quite well. DANE informs that, in 2014, most of the musical activity in the capital takes place in small venues, and 40% of revenues come from alternative music events.

Independent promoters, coming from a much younger generation, know how to recognize and take advantage of a thriving moment in show business. There is a successful company from Bogota that organises many of the festivals and events that take place in the city. It is called Páramo and is a company resulting from the fusion of T310 and Absent Papa. Both firms began hosting parties in the underground scene and now manage shows as notable as that of Arctic Monkeys, whom they brought to Bogota with an investment of 800m pesos. They also organise big concerts such as the Estéreo Picnic Festival (which, in 2015, sold 9.5b pesos in tickets and had more than 50,000 attendees), the Baum Festival, Hermoso Ruido, Breakfast and Soma, among others. In Bogota, they are responsible for shows by artists such as The xx, Foals, Queens Of The Stone Age, Muse, Hot Chip, Metronomy, Interpol, Los Planetas, Vetusta Morla, Russian Red and Dorian, among many others. Their merit is not only based on bringing such world-renowned artists to Colombia, which was unimaginable ten years ago, but also on having shaken the scene enough to get more companies focused on producing higher quality mass events. Páramo has invigorated the international music scene by bringing Colombia into the picture. In several interviews, its founders state that part of their success is in growing audiences.

**Armando Records** in Bogota is a traditional disco/club on the Colombian independent scene. They pioneered a concept they kicked off with in 2008: taking rumba home. Their history of success is associated with a campaign around a fictional character called Armando Fuentes. This character, created by the founding partners, is supposedly a very famous musician from Bogota and is the owner of a penthouse designed to feel like guests are at a very exclusive home party. With this, they created a stage which is almost a

rite of passage to play, thus generating a music circuit. They have opened their doors to large, medium and small bands, helping the city become a mandatory music destination for many international bands. Today, they manage three spaces in the city: Armando Records, Armando Music Hall and Armando Pizza y Pola, which allows them to create circuits for international bands and help bring more talent to the country. They also rely on the bar circuits to offer local artists means of promotion and public relations to support their developing projects. Armando Records mainly works with electronic, indie, house and rock artists; Armando All Stars works with tropical, salsa, champeta and reggaeton artists; and Armando Pizza y Pola works with folk, jazz, soft rock and pop artists. They recently opened a new venue in Miami that is similar to Armando Records.

**Árbol Naranja** is an interesting company that combines public relations with promotion and logistics support. They excel at working with brands, creating events for brands such as Mercedes Benz, Jack Daniels and Apple. They also support the local music scene by providing backline rentals, production equipment, a recording studio, rehearsal rooms and a management and booking agency. They have been involved in the organisation of events such as Estéreo Picnic, Hermoso Ruido, Soma, Rock to the Park, Hermoso Ruido, Soma, Hip Hop to the Park, Colombia to the Park, Jazz to the Park, Salsa to the Park, Vallenato Festival, Theatre International Festival, Aguinaldo Boyacense, Hot in Paradise, Cali Fair Super Concert and Las Puertas del Cielo. They have also worked with artists such as Enrique Iglesias, Gira ZOÉ, Depeche Mode, Coldplay, Metallica, Red Hot Chili Peppers, Foster the People, Robbie Draco Rosa, Queens of the Stone Age, Arctic Monkeys, Norah Jones, Friendly Fires, Manu Chau, Celso Piña, Gira Los Tigres del Norte, Doctor Krápula, The Hives, Interpol, Capital Cities, Thievery Corporation, Los Amigos Invisibles, La Mala Rodríguez, Bomba Estéreo, Superlitio, ChocQuibTown, Gogol Bordello, Desorden Público, Prince Royce and Daddy Yankee, among others.

#### **Main Colombian Promoters**

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Manager  
Ocesa Colombia  
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Philippe Siegenthalr  
Talent Booking

Páramo

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Juan Arbelaez

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Juan Pablo Ospina

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Bogotá Town Hall / IDARTES

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#### 3.1 Booking

With the sudden explosion of mass events and rising prominence of Colombian artists, the booking and management sector has also been growing and consolidating a group of professionals in the country. The services that these companies provide are unlimited and they are increasingly involved in the artist's development. It would be a good idea to directly contact the companies with local artists, for, as mentioned before, it is important to have a stakeholder to open the market in the country. If this is done from the beginning, penetrating the Colombian market will be a smoother process, as listeners are usually very faithful.

The circulation of international artists in Colombia is high, especially artists from the region, as Latin America offers more chances for the exchange of music, dance and theatrical content between the regions. This is due

to the common sociocultural features that shape this big market. Despite the variety of mechanisms, production scales and means of circulation, regions share tastes and identities which generate a dynamic of demand that Colombia may cover, given the high quality of its art production and the wide range of creation processes. Below are a few of the agencies in the country, as well as a description of some of the other services they offer.

**M3 MUSIC** manage Bomba Estéreo, Súper Lito and Mltú. Not only do they provide management and booking services, but they also provide record production, digital aggregation, international tour management, consultancy and digital marketing. M3 MUSIC produces the congresses of Industria Musical, Resonancia Colombia in Bogota and the Colombian versions of Amplifica Chile in Bogota and Santiago de Chile. These events gather people from every field in the national music industry in order to discuss related topics through panels, talks and workshops led by music industry professionals.

**Merlín Producciones**, apart from being responsible for the art direction of the Flower Fair and the Primavera Fest in Medellín, are also in charge of the management, marketing and international booking for Puerto Candelaria and Maite Hontelé. Founded 15 years ago as a label, they offer record production and access to recording studios, complete with mixing and re-mastering/re-processing digital tracks through analogue tape. Finally, Merlín offers live recording to 32 digital channels for any music format. Merlín has two Grammy nominations under its belt for the works of Maite Montelée (Latin Grammys) and ChocQuib Town (Grammys).

**Lasofónica** is an education project created by Merlín Producciones, endorsed by the Ministry of Culture. It aims to share the knowledge and experience of music industry leaders with the participants of the Laso formative processes. The 2013 edition saw Lasofónica travel through 16 towns in Colombia, training Laso programme participants and ex-participants in four core topics: executive production, art production, music project diffusion and live show production.

**Comma** is another agency operating in Colombia's independent scene. It is located in Bogota and currently works with artists such as Esteman and Diva Gash. It

also supports the emerging scene, as exemplified by Consulado Popular and Pantera All Stars.

**Árbol Naranja**, mentioned above as an organizer of festivals like Hermoso Ruido or Estéreo Picnic. It also offers backline services and management, working with Pedrina y Río and Telebit.

**Magic Talent Entertainment** is another producing, publishing, management and record company that conducts 360 deals with national and international artists in order to develop their careers in the Colombian and Latin American markets. It specialises in rock.

**Julio Correal** is an important producer that has been part of the Colombian scene for over 30 years. His company, Re Buena Onda, offers production, logistics, design, development, promotion, press and alternative media services. He was one of the founders of the Estéreo Picnic Festival and also has experience in previous editions of the Rock to the Park festival, Hot in Paraíso, Tour La Esperanza with Manu Chao, Rock Campeonato and Festival del Agua (Medellin, Cali, Bogota). Currently, Re Buena Onda productions represents several international artists in Colombia, such as Aterciopelados, Manu Chao, Cafe Tacvba, Enrique Bunbury, Calle 13, Robi Draco Rosa and Molotov.

Focused on more independent works and niche music is **Afropicks**, a company based in Cali. Afropicks provides different services for the development of its artists in Latin America such as booking, production, strategic advice and promotion. They focus on the creation of a different live music experience, working with promoters and artists to formulate new event concepts. A great part of their catalogue is composed of international artists, especially those with African roots, such as Amadou & Mariam (Mali - France), Ballaké Sissoko & Vincent Segal (Trinidad and Tobago) or Seun Kuti & Egypt 80 (Nigeria). In Colombia, they work with folk sounds such as champeta, island sounds and salsa, and they have been developing artists such as Charles King, Elkin Robinson and La Mambanegra. They also work with outstanding artists such as Sergent García and Novalima. Afropicks has the experience of the agency Cecom Música, created more than 12 years ago by Cédric David and responsible, until 2009, of the development of bands such as La Mojarra Eléctrica, Sidestepper, Choc Quib Town, Teto

Ocampo, Richard Blair and Jacobo Velez.

**La Llorona Records**, although mainly a record label, has also been developing the live music market, especially in urban and traditional music like hip-hop and bagpipe cumbia.

**Biche** is a creative space focused on creating thorough music experiences through artists, cultural managers and brands. It is the management agency of Los Pirañas and the booking agency of the Meridian Brothers and Abelardo Carbonó.

**Criteria Entertainment** is a Los Angeles-based company that provides services to Latin artists in the US. They also have offices in Colombia, Mexico and Argentina. They provide services such as professional consultancy, rights management, A&R support, license publishing, music pitching, product and label management and online marketing. They work in both directions, helping Anglo artists seeking to enter the Latin market as well as Latin artists trying to enter the North American market. Since its creation in 2011, the company has played a key role in the career development of artists such as Enrique Bunbury, Moderatto and The Claxons, among others.

#### Colombian Booking Agencies

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#### 3.2 Festivals

**“There is a successful company from Bogota that organises many of the festivals and events that take place in the city. It is called Páramo and is a company resulting from the fusion of T310 and Absent Papa. Both firms began hosting parties in the underground scene and now manage shows as notable as that of Arctic Monkeys, whom they brought to Bogota with an investment of 800m pesos. They also organise big concerts such as the Estéreo Picnic Festival...”**

The music industry has positively evolved in terms of attendance and genre development, as depicted by the more diverse offer of artists, greater infrastructure and larger demand. Despite the Colombian market still being relatively small compared to the markets of Mexico and Chile, it has been significantly growing and now there are events such as Estéreo Picnic, on same level as the Lollapalooza festivals in Chile, Brazil and Argentina.

In recent years, the music offer has greatly improved, and that walks hand-in-hand with the growth and development of the local market. Promoters have made efforts to develop the music scene with festivals such as the Hermoso Ruido Festival, which is an effort to introduce the continent’s emerging talent, integrate Colombia in the Latin American music circuit and nurture the music exchange between countries. Like every emerging scene, festivals in Colombia are still a very risky business, and their success depends on the convening power of the artist.

#### Major Colombian festivals

**Name:** AntiR\*scas  
**Attendance rate:** 3,500  
**Ticket Price (USD):** \$7 / 1 day  
**Date:** March

**Name:** Circulart  
**Attendance rate:** N/A  
**Ticket Price (USD):** Free (concerts only) / 3 days  
**Date:** November

**Name:** Hermoso Ruido  
**Attendance rate:** 3,000  
**Ticket Price (USD):** Ticket price varies according to capacity / 3 days  
**Date:** September

**Name:** Invazion  
**Attendance rate:** 8,000  
**Ticket Price (USD):** \$16 / 3 days capacity / 3 days  
**Date:** November

**Name:** Festival Jaguar Palomino  
**Attendance rate:** 3,000  
**Ticket Price (USD):** \$16 / 2 days  
**Date:** January

**Name:** Sierra Mar Fest

**Attendance rate:** 15,000  
**Ticket Price (USD):** \$58 / 2 days  
**Date:** January

**Name:** Storyland  
**Attendance rate:** 3,000  
**Ticket Price (USD):** \$144 / 3 days  
**Date:** January  
**Name:** Rock to the Park  
**Attendance rate:** 400,000  
**Ticket Price (USD):** Free / 3 days  
**Date:** July

**Name:** Hip Hop to the Park  
**Attendance rate:** 161,191  
**Ticket Price (USD):** Free / 3 days  
**Date:** n/a

**Name:** Altavoz Fest  
**Attendance rate:** 75,000  
**Ticket Price (USD):** Free / 3 days  
**Date:** November

**Name:** Festival Centro  
**Attendance rate:** 15,000  
**Ticket Price (USD):** Ticket price varies according to capacity (\$5 approx.) / 7 days  
**Date:** January

**Name:** Estéreo Picnic  
**Attendance rate:** 60,000  
**Ticket Price (USD):** \$176 / 3 days  
**Date:** March

**Name:** SOMA  
**Attendance rate:** 6,000  
**Ticket Price (USD):** \$28 / 1 day  
**Date:** October

**Name:** MicheRock Fest  
**Attendance rate:** 2,000  
**Ticket Price (USD):** Free / 1 day  
**Date:** November

**Name:** Manizales Grita Rock  
**Attendance rate:** 13,000  
**Ticket Price (USD):** \$2 / 2 days  
**Date:** October

**Name:** Galeras Rock  
**Attendance rate:** 5,000  
**Ticket Price (USD):** Free / 3 days  
**Date:** July

**Name:** Sultana Cali  
**Attendance rate:** 2,000  
**Ticket Price (USD):** \$21 / 1 day  
**Date:** September

**Name:** Distritofonico  
**Attendance rate:** n/a  
**Ticket Price (USD):** Free / 5 days  
**Date:** August

**Name:** Breakfast  
**Attendance rate:** 5,000  
**Ticket Price (USD):** \$52 / 1 day  
**Date:** October

#### Showcase

**“Circulart and BOMM are the most important trade fairs in Colombia as well as the main national and international showcase festivals in the country. Due to their format, showcases involve a call and are presented to several national and international programmers.”**

**Circulart and BOMM** are the most important trade fairs in Colombia as well as the main national and international showcase festivals in the country. Due to their format, showcases involve a call and are presented to several national and international programmers. Attendance at these events is not massive, as they are in general risky and emerging artists. Circulart showcases are usually held in several venues within the city and become an asset for Medellin, reactivating the area. Some shows take place outdoors and are free, allowing them to gather more than 1,000 people per show.

In 2016, BOMM joined the Hermoso Ruido Festival, which is organised by Páramo and Árbol Naranja and is held in more than 15 independent venues in the city. More than 50 shows are presented during the three days, and they have consolidated their position as the most important showcase for Latin American emerging sounds in the country.



The **AntiR\*scas** International Festival in Bogota, in the labour of promoting local talent, rewards five outstanding shows to artists from the city in order to encourage cultural exchanges at a national level. The first place winner is awarded a Mexico tour. The AntiR\*scas **International Festival** promotes the circulation of artists whose projects travel through different alternative genres of music made in Colombia such as rock, reggae, electronic, hip-hop, salsa and cumbia, as well as their corresponding sub-genres, in order to get promotion and view the paths of internationalisation at both Latin American and global levels.

Invazion is another platform that discovers new talent and independent music trends in the city of Medellin. Invazion is a leader in the dissemination and promotion of innovative proposals from DJs, bands, producers and visual artists through activity in unconventional spaces in the city and the country using new diffusion and music marketing tools. Invazion will be a powerful platform for cultural promotion in Colombia, promoting new music and visual arts that feature creativity and the continuous search for new sounds, where local artists may contact other national artists and take them beyond Colombian borders via the internet, festivals and international tours.

#### **Summer**

As Colombia is a tropical area, there are no specific summer festivals in the country, but beach events are becoming more frequent, increasing the musical tourism (this is also helped by the fact that the perception of security has also increased).

**The Jaguar Palomino Festival** has been taking place since 2014 in La Guajira, Sierra Nevada de Santa Marta. The festival, from its ecological proposal, promotes sustainable development with the chance to generate room for cultural exchange between local and international artists. It is held every January over two days, where environmental activities surrounding music are shared with adults and children. In the frame of the Jaguar Festival, pedagogical spaces for environmental education have been created, partnering with community members and social organisations such as Fundación Mágica Música, Salva tu Río, Ashé Fundación and Fundación Wai Líderes de CETAC (Home School Art and Culture Workshop, Palomino).

**Sierra Mar Fest** is an alternative music festival committed to cultural citizenship and the promotion of environmental culture among the youth and adult publics. It is located in the city of Santa Marta, with the Caribbean sea and Sierra Nevada as the focus of its activities of environmental and corporate responsibility. It is organised by the corporation La Perla Cultural and Tú También, which is already working on the 2017 edition. Two editions of the festival have already taken place. The first, in 2012, gathered more than 6,500 attendants during two days, with the outstanding participation of artists such as Doctor Krapula, Bomba Estéreo, Charles King, Monsieur Periné and Superlitio, among others. The environmental goal of that edition sought to conserve dry tropical forest. The second edition in 2014 exceeded 15,000 attendants during two days, with artists such as Alpha Blondy, Systema Solar, Pernett, The Mills, La 33, Petit Felas, Mitú, Richard Blair, Mr. Black and Martina & La Peligrosa. The environmental goal on this occasion was the promotion of the project “La Zipote Barrera de Coral”, along with the conservation of the seabed in the city of Santa Marta.

**Summerland** in Cartagena, organised for the last three years by The Royal House Society, DanceRepublik and On Beat, saw over 60,000 people from different nationalities attend its 2016 edition. The lineup featured artists such as Richie Hawtin, Danny Tenaglia, Afrojack, David Guetta, Tiesto, Steve Aoki, Deadmau5 and Armin Van Buren, among many others who lead the international scenes.

2016 is the beginning of a new era for the **EDM festival**, now operating under the name of Storyland, one of the most important in Latin America. Hardwell (Netherlands), Oliver Heldens (Netherlands) and Jamie Jones (UK) are the first confirmed artists in the next edition's line-up. Approximately 20 international artists, along with more than 15 national artists, are presented, and the attendants will enjoy academic sessions, beach and yacht parties and discounts in restaurants and shops.

#### **City**

**“Festivales al Parque (Festivals to the Park) include Rock, Hip Hop, Jazz, Salsa, Opera and Traditional Music, and are an initiative of the Colombian government...There is a selection**

**via public tender of independent musicians representing various genres, combined with invitations to highly recognized regional and national artists, all of which subsequently play at mass events held in the city's park network."**

These kinds of festivals are the most common in Colombia, increasingly popular in main cities and gaining traction in intermediary cities, as well.

The above-mentioned **Festivales al Parque** (Festivals to the Park) include Rock, Hip Hop, Jazz, Salsa, Opera and Traditional Music, and are an initiative of the Colombian government. In 2014, the festival turned 20 years old. They have become the most visible example of good music practices in the city, incorporated into cultural policy as a tool of diversity promotion and difference recognition, through free concerts in public spaces.

The programme is, in itself, a strategy of creation stimulation. There is a selection via public tender of independent musicians representing various genres, combined with invitations to highly recognized regional and national artists, all of which subsequently play at mass events held in the city's park network. The project has been a launchpad and projection platform for many local and national bands of all genres. Thanks to this space, those artists have achieved recognition and local and international projection.

**Rock al Parque** (Rock to the Park) is an international rock festival that has taken place in the city of Bogota, Colombia, since 1994. It is the biggest free and open air festival in Latin America and the third-biggest one in the world.

**Altavoz Fest** is a strategic programme by the Secretary of Culture of Medellin, designed to generate a space of coexistence between the young people from different urban cultures. Since its inception in 2004, the festival has become a platform for the creation, production, dissemination and circulation of musicians in the city, where local bands, selected through public tendering, share the stage with international guests, as well as take part in exchange processes with other national and international festivals. Altavoz Fest is also free, and in

September 2016, it gathered 75,000 people and 57 local, national and international bands to two concurrent stages during three days of concerts at the Juan Pablo II Airpark.

Also within public sector organisation, the **Festival Centro** in Bogota is a music festival which offers an artistic programming representing a variety of genres and music trends. Organised by the Bogota Town Hall, it presents seven days of festival celebrations, where at least five national and international artists are presented each day. It is held between the second and third week of January, making it the first festival each year in Bogota. Festival Centro has positioned itself as an important platform for emerging artists in the Colombian scene, with the aim of doing the same as other festivals in order to continue boosting the growing artists and consolidate those with a greater trajectory.

The seventh edition of Festival Centro (held in January 2016) has been a result, as in previous years, of a long process. A public tender under the name of "Young Talents Festival Centro 2016" was issued, calling all young musicians living in Bogota to share their proposals. The 15 best ones were presented at the "Muelle de la Fuga" between July and October 2016, so that in November, the public could select (through Facebook votes) the 10 best artists, all of whom will be presented on the first day of the festival.

The festival's name invokes its message to both physically return to the city centre, but also for participants to return to their own centre. Art and music are catalysts that allow interiorisation, and, in tune with this, Festival Centro 2016 relayed the message that a return to city centre was a means of re-appropriating the city.

**Estéreo Picnic**, organized privately and independently by Páramo, takes place in the Sabana in Bogota with national and international artists playing rock, electronic, pop, new folk and other genres. This event also features cultural and entertainment activities as an alternate to the concerts, where attendants may enjoy open air food and art. Musically, they focus on artists with high local, national and international recognition, and they add side events, such as the "hippie market" fair and plenty of space for coexistence between attendants. Some artists who have passed through its stages are The Killers, Red Hot Chili Peppers, New Order, MGMT, Los Fabulosos

Cadillacs, Bomba Estéreo, Tiësto and Nine Inch Nails.

**SOMA**, also by Páramo, is a sound platform for the socialisation of projects. It takes place over 5 days in different types of venues, with national and international artists and genres ranging from the most innovative rock to the most experimental electronic.

The same organisers have also created Breakfast Medellín, a festival that gathers national and international artists and gets them to share open spaces through a built experience. This experience is a ritual that recalls the times of the Colombian ancestors and converges them with new audiences through sound. International musicians such as Caloncho, Capital Cities, Molotov, Frente Cumbiero and Claptone have taken part in this festival.

Similar events are also being held in smaller cities and, although the proportions are not the same, this is a new and promising development. The following are a few examples.

**MicheRock Fest**, in Barranquilla, has summoned throughout its trajectory more than 700 bands and solo artists, mainly from the Caribbean region. In recent years, the festival took a national and international turn, receiving national bands from Bogota, Medellín, Cali, Bucaramanga, Boyaca and also international bands from Venezuela, Ecuador, Argentina and Peru. Internationally-acclaimed artists such as Blick Bassy from Cameroon, Aterciopelados and Los de Adentro have also attended.

After identifying the need for a space to enhance culture and art from the emerging music dynamics in the city of Manizales, the festival **Manizales Grita Rock** was born in 2005. It has become the most important south west Colombian vehicle for the live introduction of national and international artists to regional youth. It also works as a space of coexistence and tolerance, whose focal point is music as generator of different cultural manifestations of the city's youth. Having seen nine editions, Manizales Grita Rock has overcome the frame of a 'just music' event to include in its programme training activities, participative forums, workshops and talks.

**La Sultana Cali** is a festival organised by Páramo which, every year, gathers high quality national and international bands. In this festival, bands that have already seen some international acclaim, such as La Mala Rodríguez, Telebit,

Bomba Estéreo and Mounsiere Periné, share the stage. It is quite a young festival, only in its third edition, but it is certainly an innovative bet that makes its way to a new public in cities where the offer was previously limited.

**Galeras Rock**, in Pasto, south of the country, is an urban and alternative art lab. As part of the Colombian cultural policy mentioned before, this space aims to boost the Colombian independent scene. The stage features punk, hip-hop and rock-fusion acts, with a lineup of guest bands including La Mala Madre, Holocausto, Blues INK, Juana Mary, Puerto Candelaria and Letal Fuzion, among others. The proposal for 2016 is that of a sound lab where workshops, clinics and talks about the music industry are provided, along with the live mixture of sounds.

Another event included in the Colombian cultural policy is **Festival Distrifónico** in Bogotá, which gathers a great range of musical expressions that articulate diversity. Chamber music, rock, traditional music, jazz, electronic and new tropical sounds all meet in this event. The festival's eclecticism is what positions it as a multifaceted festival within the Colombian scene, as different markets are served.

#### **Multi-arts**

The **Festival Iberoamericano de Teatro** (Spanish American Theatre Festival), FITB, is a cultural contest created in Bogotá with international character which takes place every two years. It was directed and produced by Fanny Mikey, Argentina-born but Colombia-naturalised theatre actor and cultural entrepreneur, until his death in 2008. It is the most significant cultural event in Colombia and the largest performing arts festival in Latin America.

The event has consolidated itself as the biggest theatre festival in the world, with more than 800 shows from 100 international companies across five continents and 170 Colombian companies, gathering the most important theatre companies in the world. Its music programme is focused on the "Carpa Cabaret", where, over two weeks, around 20 bands are presented, most of them Latin genre, along with fusions and traditional rhythms. This year, Carpa Cabaret was hosted by Armando and showcased two ambiances: Armando All Stars (1,000 people capacity), with Caribbean and Pacific rhythms, salsa, champeta, chirimia, calipso and new Colombian music; and Armando Records (700 people capacity), with and a programme of avant-

garde and electronic sounds.

**Audio Rock Festival** is one of the country's most important stages. It has been taking place for nine years in the frame of the Sobre Ruedas National Sound Championship in the cities of Bogota and Medellin, with 13 editions of the festival held in both cities. More than 50 national and 20 international bands have been presented at Car Audio Rock Festival. National bands include Superlitio, La Derecha, 1280 Almas, Skampida, Dr. Krapula, La Mojiganga, Kraken, The Mills, Nepentes, Alerta Kamarada and Don Tetto. International bands include Kreator (Germany), Exodus (USA), The Iron Maidens (USA), Molotov (Mexico), Stratovarious (Finland), L.A. Guns (USA), Sobredosis de Soda (Argentina), Lita Ford (USA), Quiet Riot (USA), Faster Pussycat (USA), U.D.O. (Germany), Mike Vecera (USA), Blaze Bayley (UK) and Tim Ripper Owens (USA).

**The Flower Fair** in Medellin, Colombia, organised by the Congress Bureau of Medellin in association with the Town Hall, is an event that attracts mass amounts of local residents and tourists each year. During the Silleteiro Parade, millions of flowers are displayed embellishing chairs, which involves hard work from the farmers of the Santa Elena region, who, with more than 80 varieties of flowers, compose landscapes, portraits, messages with local and civic values and authors' self creations. Carrying all this, they take a monumental tour through the city's main avenues. During the Festival, large free open air concerts are held with national and international bands, especially those of popular and regional music, pop, and Latin fusion origins.

The **Summer Festival** in Bogota has taken place every year since 1997 and includes cultural, sports and recreational activities. Along Bogota's circuit of parks, activities are organised in August for the city's community. The Recreation and Sport District Institute is the government department in charge of the festival's execution and makes sure all the activities are free. Usually, the music programme is local and national, and includes all genres.

**The International Image Festival** in Manizales is a digital cultural and electronic arts event that has been organised by the Visual Design Department of the University of Caldas since 1997. With a 19-year trajectory featuring 15 editions, this festival has positioned itself as an event with international significance and an academic reference in

topics regarding design, art, science and technology. In 2017, the festival will host the first Latin American edition of the International Symposium on Electronic Arts (ISEA), which is the world's most important project concerning electronic art. The music programme is electronic, mostly local or local artists working alongside international artists.

It is important to highlight that Medellin, Barranquilla, Cali, Bucaramanga, Bogota and Villavicencio will be hosts to the seasonal festivals of Club Colombia Oktoberfest, which will take place on October 3-8 and will gather thousands of attendees, lovers of the beer culture. As in previous years, one of the main attractions will be the shows by Colombian and foreign artists held at the different events. Some of the most relevant artists that have previously performed include ChocQuibTown (Medellin, Bucaramanga and Bogota), Los Amigos Invisibles (Cali), Los Cafres (Barranquilla), Aterciopelados (Bucaramanga), Shaggy (Bogota) and La 33 (Villavicencio and Bogota).

#### Genre

Colombia's **Circuit of Jazz** is held in September in different cities throughout the country, such as Bogota, Medellin, Cali and Barranquilla. Over two weeks, Bogota, Medellin, Barranquilla, Pasto and Cali simultaneously host programmes managed by the festivals attached to the Circuit: Jazz to the Park, Free Theatre Jazz Festival, Medejazz, Barranquijazz, Pastojazz and Ajazzgo, the Meeting of Jazz, Fusion and Experimental Creators.

For the first time, the Circuit will transcend borders, achieving international bonding with the Seventh Jazz Festival of Barquisimeto, Venezuela. The most active dynamic in the Colombian Jazz Circuit is the circulation of national and international artists throughout the platforms of the festivals that make it up, portraying their productions through the presentation of their own creations to new audiences and consumers. The circulating bands have the chance to exchange conceptual, cultural and artistic knowledge while interacting with the audience.

**DelPutas Fest** is an independent music festival created by musicians and artists from the city of Medellin as a performance space within the national circuits, where all proposals of rock, metal, punk and alternative genre are

held. In recent years, DelPutas Fest has mobilised artists from several regions in the country to the Antioquia capital in order to boost talent to higher levels and has achieved exchange agreements with artists and festivals at an international level.

In 2016, DelPutas Fest Radio will be launched as a means to support the promotion of all its associated artists. The entity will also launch DelPutas Fest Records, a label that provides physical and digital support for the contents.

Other genre-oriented festivals with great trajectory are the **Jamming Festival** in Bogota, founded five years ago; Reggae Colombia; and “Rastazo” or Rototom Colombia (imported from Europe’s Rototom Sunsplash, the biggest reggae festival in the old continent).

In 2004, a collective was created that would later become Bogota’s most important reggae bar: Casa Babylon. From there, Paola Moreno and Alejandro Casallas exalted the sounds of Jamaica and gradually, through the presentation of multiple artists on the bar’s stage in Chapinero, moved up to create the Jamming Festival, the first great stage of the reggae movement in Colombia.

The **Pacific Music Festival**, Petronilo Álvarez, is one of the most recognised events, not only in Colombia but in Latin America, due to its high quality standards and the outreach to portray a culture hidden for many years in the jungle and the banks of Colombian Pacific rivers. In 2016, the 20th edition was held, under the motto “20 Years of Living Memory”. The festival has an academic component which includes talks, conferences and knowledge exchange.

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**“The use of English is widespread in Colombia, but it is recommended to have a translator or interpreter who may assist in interviews or business meetings if Spanish**

**is not mastered. Professionals should be consulted first about the necessity of a translator, as they might be offended.”**

#### 3.2 Touring in Colombia

It is important to take into account that distances in Colombia must be carefully planned for, as the country's road infrastructure is in development, and the roads that connect the country are not in a very good state. For any inexperienced driver, Colombian topography may be a little complicated to deal with, as roads are narrow and the driving style is aggressive. It is important to gather good information about which sections could be traversed by land and how long this journey might take. There are some low cost airlines such as Viva Colombia or Satena (which does not reach all regions), but extra costs should be taken into consideration, as they do not include luggage. It is best to buy tickets well in advance through the national airline Avianca, although it is quite expensive, especially on weekends and holidays.

The use of English is widespread in Colombia, but it is recommended to have a translator or interpreter who may assist in interviews or business meetings if Spanish is not mastered. Professionals should be consulted first about the necessity of a translator, as they might be offended.

Colombia is currently in a boom of mass shows, one of the countries with greater expected growth in this field in the next five years. In fact, it shares this position with countries such as Vietnam, Indonesia and Pakistan, as well as the Middle East region and northern Africa.

The law 1493, published in 2011, that obliged show organisers to include a local band, otherwise they should pay an additional tax, is no longer in effect. This has opened the possibility of bringing a high standard of bands to open for the important headliners. Now, the law only states that “those responsible for public shows with international artists will guarantee the same technical, scenic and personal conditions to national artists who share the stage with them”.

Whether the headliner is national or international, the revenue distribution is made according to the number of songs played during the show. For example, in a show

where the main artist played 20 songs and the supporting artist played 10 songs, the ticketing money is divided between 30. A percentage ranging from 30% to 40% of the total amount must be deducted for the Colombian Society of Authors and Composers (Sayco).

Promoters assert that the infrastructure in Colombia is still the biggest barrier for this industry, as the places authorised for concerts must be adapted to the technical needs of the show (which means additional costs to the organiser), and thus do not meet the expectations. The greatest investment that event promoters make is usually related to infrastructure.

The Nemesio Camacho El Campín Stadium is a good example of this situation. Located in Bogota, with 48,000 people capacity, it is not often for lease as the grass gets damaged. Other venues are El Campín Coliseum, with 15,000 capacity; the Simon Bolívar Park, that can accommodate up to 140,000 people; and some theatres, whose average capacity is 1,500 people.

It is important to take into consideration that, in order to conduct a concert, producers must be registered as such in the Ministry of Culture. Upon getting the authorisation, it is valid for two years, thereby reducing the bureaucratic procedures. If the ticket price is more than US\$ 24, producers must pay a 10% tax to the town where the event is held. The money collected with this tax will be used to improve the town's show infrastructure, proof of the government's interest in strengthening the music scene.

**“The law 1493, published in 2011, that obliged show organisers to include a local band, otherwise they should pay an additional tax, is no longer in effect. This has opened the possibility of bringing a high standard of bands to open for the important headliners.”**

#### 3.3 Fees

At this moment, with the hard competition that is taking place in Colombia, promoters are not very open to discussing this topic. The bid with offers gets more and more complicated, and renowned artists may end up collecting much more money than they usually do

without this being reflected on the ticket sales. Certainly, this way of operating is not sustainable over time, but it has indeed generated great speculation around prices.

These are the payments to “undiscovered artists”, who are artists with 1 to 3 year trajectories, playing 1 to 10 concerts per year and registering 1,000 to 10,000 followers on Facebook:

**Festivals:** These artists usually play at festivals with a promotional goal, they get accommodation and production support.

**Venues:** They play in coproduction, with deals of 80% of the ticket sales for the artist and 20% for the venue. This is not very regulated, and in some cases, when there is alcohol sale, the artist gets 100% of the ticket sales.

The ranges of payments for emerging artists, that is, artists with 3 to 5 year trajectories, playing 10 to 25 concerts per year and registering 10,000 to 80,000 followers on Facebook, are as follows:

**Festivals:** This kind of artist charges a fee between US\$ 1,500 and 5,000 for playing onstage at consolidated festivals. Usually, travel expenses are supported by embassies, public institutions of their country of origin or record companies, among other entities.

**Venues:** Venues usually pay this type of artist between US\$ 1,000 and 3,000 or reach production agreements.

Consolidated artists, or artists with more than five year trajectories, playing 25 to 70 shows per year and registering 80,000 to 200,000 fans on Facebook, charge:

**Festivals:** Fees between US\$ 10,000 and 30,000, on average, plus all logistic expenses.

**Venues:** Fees around US\$ 10,000 to 20,000.

Mainstream artists are those with a high media outreach. They are played on the radio, play more than 70 shows per year and have more than 200,000 fans on Facebook. They charge:

**Festivals:** Fees between US\$ 50,000 and 100,000, on average.

**Venues:** In this case, fees do not differ much, and stand between US\$ 50,000 and 150,000.

Artists with a historical trajectory, internationally renowned, who usually play at stadiums or arenas, charge a fee between US\$ 250,000 and 1,000,000. The business around these kinds of artists recovered about seven years ago in the country, and artists such as the Rolling Stones, Paul McCartney, Madonna and Metallica include Colombia as part of their Latin American tours.

#### 3.4 Opportunities for Canadian Independent Artists

Opportunities for Canadian independent artists in the live music scene in Colombia are positive, as the country’s production services, sales and live shows revenues grew exponentially.

The outlook is a great opportunity, as concert costs have decreased due to a greater trust in the local professional staff. Historically, when an international artist was playing a show in Colombia, somebody was sent from abroad to monitor the work of the Colombian staff, but throughout the years, the local staff has been specialising in their field and that is no longer necessary.

Security developments are also no longer an issue, as playing shows in Colombia is now safer than before.

The audience in Colombia is becoming more connected to the international cultural and music movement and is willing to enjoy the shows of international artists in the country, even at a high price. Thus, Canadian independent artists now have a chance to enter the Colombian music scene that probably did not exist before.

**“Whether the headliner is national or international, the revenue distribution is made according to the number of songs played during the show. For example, in a show where the main artist played 20 songs and the supporting artist played 10 songs, the ticketing money is divided between 30.”**

## 4. PUBLISHING MARKET

Unfortunately, the music publishing business model is still little-known to Colombian musicians. According to a study conducted by Fedesarrollo, these are the main types of rights management contracts in the Colombian phonographic industry:

- **Publishers or producers buy the entirety of rights for a specific sum.**
- **Publishers, producers and authors agree on a system strictly based on previously-negotiated royalties.**
- **Publishers or producers pay royalties to authors, performers or both, plus some sums in advance for future collections.**
- **Authors, performers, or both pay for all costs and receive all revenues.**

The most common system is that of just paying royalties, calculated as a percentage on sales. This system allows for a better risk distribution among the stakeholders.

Colombia Sayco (Society of Authors and Composers) reported that, in 2012, 50,616 new works were registered, of which 44% corresponded to unpublished literary works, 26% to music works, 13% to artistic works and 6% to phonograms.

### 4.1 Collecting Societies

In Colombia there are mainly two collecting societies related to the activity of the performing arts sector: the Society of Authors and Composers (Sayco) and the Colombian Association of Performers and Phonogram Producers (Acinpro).

The Society of Authors and Composers (Sayco) is in charge of managing the collection for communication and public performance royalties, along with mechanical royalties for the works of the associated authors and composers. In the case of Sayco, songwriters must hold at least ten recorded and publicly released songs; artists / main performers must have fifty fixed performances; backing performers must have a hundred performances; and producers must have 150 nationally-produced phonograms.

The royalties collected by this society mainly come from the live music sector, with 30.4% of the total amount collected. Within this category, live performance (live music shows) holds the largest collection percentage (30%), surpassing dramatic works (theatre) and other kinds of shows, such as dance or circus, among others.

This collection, distributed among the authors and composers of Colombia, showed a growth of 83% during the period between 2005 and 2011, passing from 15,765,000 Colombian pesos collected in 2005 to 28,542,000 Colombian pesos collected in 2011. This rise is due to the increase of collection at public establishments, live shows (live performance), paid television and radio stations. The trend continues to grow, with 40.821 million Colombian pesos collected in 2014.

**“In Colombia some music publishing firms have grouped into the Colombian Association of Music Publishers (Acodem). When wishing to use a music work, one can address Acodem in order to inquire if one of the associated publishers is the rights holder and, if so, get the required license.”**



## MUSIC CREATION (SUGA 2016) RIGHTS COLLECTED BY SAYCO (2005-2014) (CUENTA SATELITE DE CULTURA-DANE)

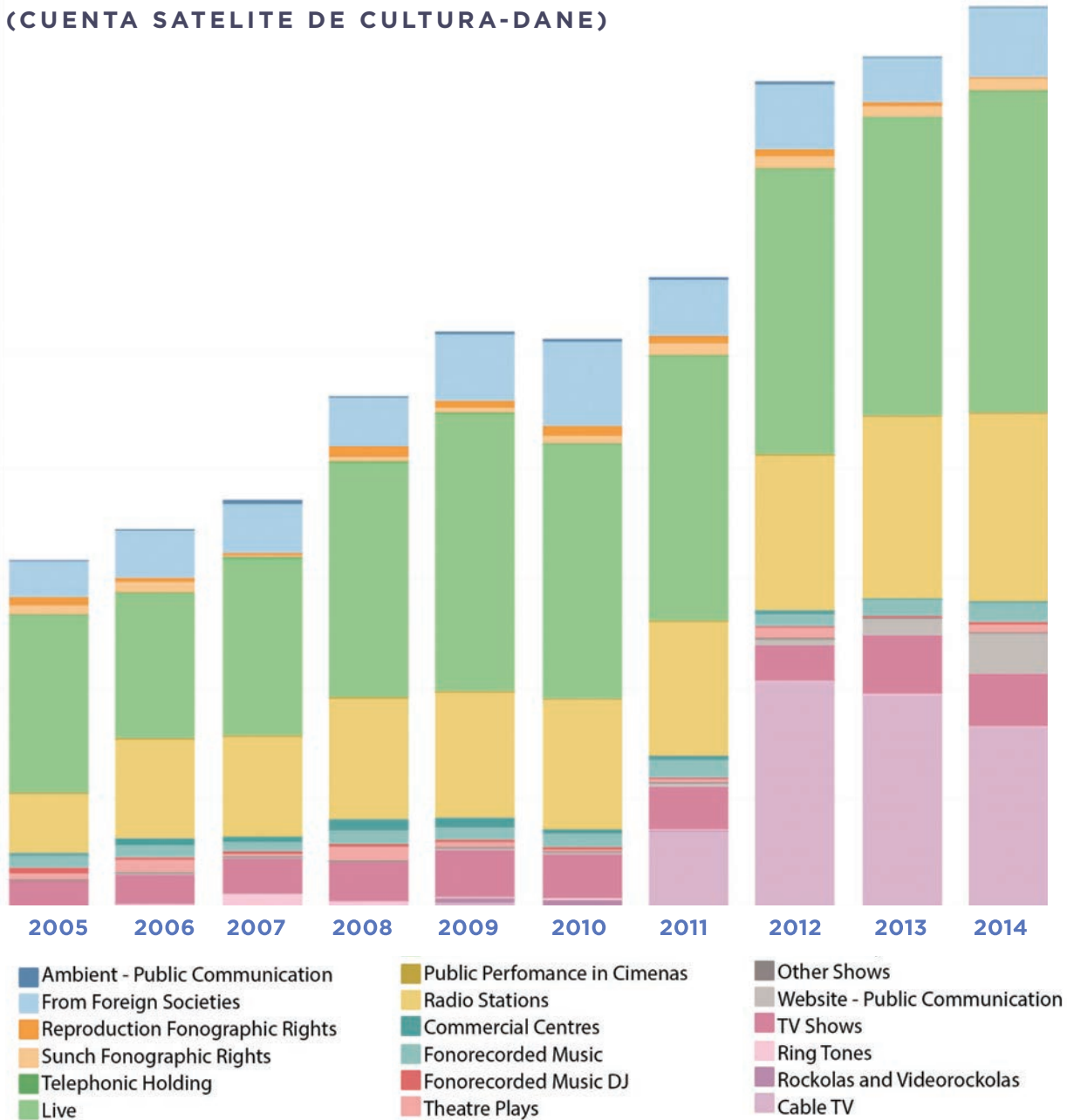


Figure 17: Money Collected by Sayco according to the Use of Rights. Source: Sayco

Additionally, there is the Colombian Association of Performers and Phonogram Producers (Acinpro), which manages the collection and distribution of property rights for the execution and public communication of phonograms. This is a collecting society for rights related to those of the author. It is recognised and authorised by the National Directorate of Right of Author to commercially manage and distribute the rights derived from the public communication of music recorded in phonograms that correspond to artists or performers and phonogram producers who are associated to the entity. Added to this benefit are the social security services provided to artists.

According to data provided by Acinpro, the sum amount distributed for performance and public communication rights between 2005 and 2011 increased by 98.4%, an average growth rate of 12.4%. This shows great revenues from property rights for artists, performers and producers.

In Colombia some music publishing firms have grouped into the Colombian Association of Music Publishers (Acodem). When wishing to use a music work, one can address Acodem in order to inquire if one of the associated publishers is the rights holder and, if so, get the required license. The associated publishers are: Universal Music, Fm Entretenimiento, Edisdago, Peer Music, Codiscos, Sony Music Publishing, G&C Publishers, Vender Music, Piles Latinoamerica, EMI Music Publishing, Sincronia, Discos Fuentes and Star Arsis.

### 4.2 Industry Requirements

In Colombia, in order to register a music work that has music and lyrics, both the lyrics and the melody sheet must be submitted. If the creator only wishes to register the lyrics, they will have to be registered as a literary work. When a loop is going to be created from of all or part of an existing musical work that belongs to someone else, in any type of support (as a CD or a computer), the rights holder for that work must be contacted in order to ask for the previous and express authorisation. If music publishers hold the author's property rights, then they may affiliate with Sayco. Authors or composers who wish their works to be managed by Sayco must affiliate with it by subscribing a mandate agreement.

According to Sayco, around 20% is deducted from the collected music royalties and assigned to pay taxes, operating costs and collecting costs. Net author's rights are distributed quarterly, with 48% of the total amount given to the collecting societies of foreign authors and composers whose music was featured in radio, television and commercial establishments in Colombia. 33% is given to the nine record producing studios established in Colombia and their publishing companies. 10% is given to the social fund that covers the four thousand affiliated composers. The entity covers its affiliates total medical and funeral expenses and also pays the composers of analogical works a monthly wage ranging between 500,000 and 1 million Colombian pesos. Finally, 9% is distributed among the Colombian active composers affiliated with Sayco. It is important to highlight that 80% of the amount collected for author's rights at big live shows played by foreign artists is transferred abroad.

### 4.3 Opportunities for Canadian Independent Artists

Live music in Colombia shows great economic potential in terms collecting author's rights, as Sayco collects 10% of every ticket sold (a higher percentage than other collecting societies in the region).

Opportunities in synchronisation with audiovisual media and public communication are smaller, as this market is very focused on local products and projects.

## 5. SECONDARY MARKET

### 5.1 Merchandising

Passion for music is growing in Colombia and, among the different types of Colombian fans, there are those who always want something related to music, something physical that can be touched and conserved and retains that certain thing that identifies it with the artist. Merchandising is gaining importance among the fans in the country and may become an additional source of income, although as of today, it cannot be considered as stable. The most common items local artists distribute are records, sneakers, caps, mugs, etc., which are sold at the doors after a show. However, it is not very common for artists to do this as they compete with unofficial local producers who seek to take advantage of queues at the exits by selling poor quality products. No official data exists depicting that state of merchandising sales or companies specialised in music merchandising in Colombia.

**“In Colombia, sponsorship of musical events is high for alcoholic beverage brands. In fact, alcoholic beverage brands (excluding beer) are 7.4 times more likely to sponsor a musical event than the rest of brands, according to IEG. This is followed by beer brands (6.2 times more likely than average) and non-alcoholic drinks brands (also 6.2 times more likely).”**

### 5.2 Brand Engagement

These days, the music industry is strengthening in the country, and the country’s most important productive sectors are betting on investing in national artists, thus helping to build a healthy and constructive entertainment practice. Brands, especially car and alcohol brands, have become the most important event promoters. Still there is a lot of work to do in order to get brands to support local talent and consider it profitable, as their biggest interest is to place themselves in high-visibility events, where they can achieve an immediate increase in their sales.

In Colombia, sponsorship of musical events is high for alcoholic beverage brands, in fact, alcoholic beverage brands (excluding beer) are 7.4 times more likely to sponsor a musical event than the rest of brands, according to IEG. This is followed by beer brands (6.2 times more likely than average) and non-alcoholic drinks brands (also 6.2 times more likely). Club Colombia is a national beer brand belonging to the Bavaria group, and, despite Colombia not

being a globally notable place of beer consumption, it is the product leading sales in the country for alcoholic beverages. Every year, according to Euromonitor figures, 2.194 million litres of beer are consumed in the country, which means that the average beer intake per Colombian is 45 litres. Club Colombia hosts its own itinerant festival, Oktober Fest, where the presence of local talent is quite important, and also officially sponsors other festivals like Estéreo Picnic. Meanwhile, Heineken is the official sponsor of the Storyland Festival in Cartagena, Absolut and Jameson sponsor SOMA and Johnnie Walker is also sponsoring Estéreo Picnic as well as the new festival Almax, which Ocesa Colombia is currently organising in Bogota.

According to the Nielsen report “Music 360”, sponsoring a concert “produces great favourability among fans”, with most of respondents endorsing this type of action and almost two thirds of them alleging that the vision of the product at these events also contributes to a more favourable vision of the brand.

**“Sponsors may find an especially receptive audience in Latin Americans, as this group is 126% more prone to appreciating brands that engage in these kinds of events. Besides, the Latin American public invests more in live concerts, assigning 60% of their total live event spending to musical events, which is a rate slightly higher than the average.”**

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Teenagers tend to show a bigger spending on music festivals and live shows featuring several artists. This group is also important for sponsors, as 43% of teenagers tend to see brands sponsoring musical events in a more favourable way.

In this sense, another study related to sponsoring investment states that brands are increasing their spending on music tours, festivals and similar events, reaching 1,500 million Colombian pesos this year, which marks a 5.6% increase from 2015.

There are other companies that have also widely supported

the cultural sector in Colombia. For example, the holding group Public Enterprises of Medellín, owned by the Town Hall of Medellín, provides electricity, drinking water, gas and sanitation to the towns where it has presence. Apart from cultural events, this holding company supports other events in the city related to sports, education, environment, business and human development. Another important holding group is Grupo Santodomingo, which used to own Bavaria (now owned by SAP Miller), Avianca (now owned by Germán Efromovich) and Caracol Radio (now owned by Prisa Group). Currently, they own El Espectador newspaper, Cromos magazine and Caracol Television. Through Cine Colombia, they partnered with Virgin Mobile in Latin America.

### 5.3 Other Players

The field of synchronisation is recently being explored by some entrepreneurs in the music industry who are willing to make all their contacts available to other musicians. This applies to the company Music All, recently created, which seeks to speed the communication processes between artists and businessmen who mutually need their services. They are the first web platform in Latin America to provide sound identity to companies, advertising agencies, cinema and television production companies or video games developers. They hold a musical talent community of more than 600 composers, artists and music producers of great trajectory, willing to offer high quality musical content created specially for each project.

Musical.co was selected as one of the seven projects at the third cycle of acceleration Wayra Colombia, one of the main accelerators of the TIC sector worldwide, with presence in twelve Latin American and European countries. More than 530 projects took part at a national level, and Musical.co was elected due to its innovative proposal and great staff. They also took part in “Bogotá Creativa” (Creative Bogota), a programme by the Chamber of Commerce of Bogota, were organisers of the music area in Colombia 3.0 and were selected to attend the renowned acceleration programme MassChallenge in Boston. They are also supported by Innpulsa Colombia.

Another very successful venture related to the music industry is Colombia Loops, the first Colombian sound bank available globally. It has a virtual store where cumbia, vallenato, porro and island music, among other sounds, can be purchased, as well as the sounds of instruments like the marimba de chonta. They also have a free App that enables people to create remixes with the music and share them online. Sounds in the virtual store are recorded in the main regions of Colombia and are bought from very talented

musicians who have no access or means by which to sell their product. Colombian Loops was awarded by the United States government with a link to Young Leaders of America 2016 (YLOA), an entrepreneurship programme.

### 5.4 Radio

**“Colombia is, probably, one of the countries in Latin America with the greatest development of community radios, managed by collectives, associations, civil society organisations and churches. A high percentage of these stations belong to the Catholic Church.”**

Colombia stands out for having one of the most developed radio markets in the world, in terms of coverage, penetration and technology. Private radio in the country has a tradition dating back more than eighty years and, despite the strong competition with audiovisual media, has been able to maintain an important share of the advertising cake.

Music radio stations organise their offer along two basic schemes: first, the regular programming, which consists of a hierarchical list that assigns priority in timing and number of broadcasts to the songs accepted into it; second, the specialised programming, which includes less generic music, usually commented. Music in the regular programming circuit occupies the main chunk of broadcasting time, whilst specialised programmes occupy a limited time.

The two main radio chains in Colombia are Caracol and RCN, both managing several radio stations and television channels.

Radio moves local, regional and national trends. It no longer needs to be centralised in a studio. It is possible, due to technology, to have virtual working tables, with journalists located in different places in the planet, a development which has led to a democratisation. Community radios are also a very interesting element of the Colombian radio scene. Colombia is, probably, one of the countries in Latin America with the greatest development of community radios, managed by collectives, associations, civil society organisations and churches. A high percentage of these stations belong to the Catholic Church.

The Ministry of Communications leads an important process to organise community radios, while other entities, such as the Radio Division of the Communications Directorate of the Ministry of Culture, have performed a training role. In recent years, radio has taken place in the so-called “intermedial convergence”, integrating its way of acting with television and show business.

## 5. SECONDARY MARKET *Opportunities for Canadian Independent Music Companies in the Colombian Music Market*

In the National Survey of Culture 2014, radio occupies the third place within Colombians' cultural activities, although it may as well be included in what Colombians consider their first activity: listening to music. Radio is, for many social sectors, the most important instrument for information and music listening, as well as for following sports such as football. A very interesting fact shown in the same survey is that Colombians choose radio as their first option when asked what they believe is more helpful for cultural development.

The level of radio penetration in Colombia, compared to other Latin American countries, is high. Comparing the number of inhabitants and households in Colombia, radio coverage is almost total: 98.5% of households receive AM signal and 97.5% FM. Within the link systems, there are programmes with great national coverage, especially the news programmes. Some of them, in the main chains, are simultaneously transmitted in 44 cities, with an exposed population of around 22 million inhabitants. Some talk shows or sports programmes also reach coverages of 22 to 23 cities, and some tropical music stations cover 22 cities.

There are also programmes with no great national coverage but that cover considerable parts of the population groups with a wider audience, such as in the case of rock, pop and dance music stations.

**Region:** Antioquia  
**Number of Radio Stations:** 170

**Region:** Valle  
**Number of Radio Stations:** 77

**Region:** Boyacá  
**Number of Radio Stations:** 75

**Region:** Santander  
**Number of Radio Stations:** 71

**Region:** Atlantic  
**Number of Radio Stations:** 54

**Region:** Bolívar  
**Number of Radio Stations:** 40

**Region:** Caldas  
**Number of Radio Stations:** 40

**Region:** Cauca  
**Number of Radio Stations:** 37

**Region:** Capital Dist.  
**Number of Radio Stations:** 32

**Region:** Cesar  
**Number of Radio Stations:** 28

**Region:** Tolima  
**Number of Radio Stations:** 22

**Region:** North Santander  
**Number of Radio Stations:** 21

*[Table 1: Number of Radio Stations per Region. Source: ANIF (2000)]*

Compared to other countries, the advertising investment rate in radio compared to the total amount of advertising investment is also quite high. Despite having decreased due to the current climate, advertising investment in radio keeps rates of around 17%, a rate much lower in other countries.

**“Radio is, for many social sectors, the most important instrument for information and music listening, as well as for following sports such as football. A very interesting fact shown in the same survey is that Colombians choose radio as their first option when asked what they believe is more helpful for cultural development.”**

### 5.5 Opportunities for Canadian Independent Artists

Regulations in advertising for certain types of products, such as cigarettes and alcohol, result in branding activities being performed through BTL (below the line) strategies. Thus, many brands bet on music to reach consumers through parties, festivals and concerts.

The BTL (below the line) market in Colombia has been growing around 6% every year, to the extent that, according to the pilot study by Asomedios, today it is the medium with the greatest advertisement investment, with more than 1 billion Colombian pesos in circulation. It is above television, radio and other traditional media. There are around 180 BTL agencies in the country, a figure which has consolidated Colombia as the leader in the Latin American region, not only in awards, but also in strategy and service exports.

This creates opportunities for artists, as these kinds of strategies are based on direct marketing and event experiences. This market niche is closely linked to the great number of fairs and conventions that take place in Colombia that have strongly bet on business tourism in cities like Cartagena, Medellín, Bogotá and Cali and have an international character. Many of these events include national talent shows.

## 6. MEDIA AND PUBLIC RELATIONS

Public relations are of vital importance in Colombia, as opinion leaders are able to mobilise many people. This is not only done through the traditional medias of TV and radio, but also, as mentioned before, through the use of social networks such as Twitter or Facebook, where these opinion leaders comment on important issues and choose whether or not to express support for different artists.

In recent years, the role that public relations plays in image positioning and stakeholder relationships has been reevaluated. Not only in the business field, but also in advertising, communication media and even politics, public relations have been one of the most effective communication tools.

Public relations are of utmost importance in the music field, as it is essential to keep networks of contacts with media, businessmen and sponsors and create bonds with fans in order to get them to help boost the artist's career. Thus, the number of companies covering this sector for artists, specialised in creating their PR plan, is growing.

**“In Colombia there is a very strong relationship between media and politics. Owners of the media groups have an active participation in the public and political spheres of the country, as well as in different economic sectors, resulting in a few power groups which control the media.”**

### 6.1 PR Agencies in Colombia

There are many PR-specialised companies focusing on ATL and BTL strategies in Colombia. However, not many of those are specialised in music. Furthermore, recording, booking and management companies are conducting this task for their associated artists, in response to a market that increasingly seeks a 360 degree development strategy.

The major Colombian agency specialised in sponsorship consultancy in order to foster, market and promote the entertaining industry (music, culture, fashion and sports) is Sponsorship Consultancy Intelligence (SCI). They partner with the best brands and managers in the sector in order to create and develop strategies after evaluating the opportunities that allow the maximisation of results for both parties.

**Bido Music** is a recently-created company that creates consumption experiences at stores through music. They provide merchants the service of background music, which is a new business model to manage phonographic recorded music. That is to say, it is another source of income for musicians.

**Ramos García** is another company that supports artists in search of their identity, remembrance, awareness and recognition at national and international levels. They work with Julio Reyes, Juan Pablo Vega, Paula Arenas and Esteman, among others.

### 6.2 Media in Colombia

In Colombia there is a very strong relationship between media and politics. Owners of the media groups have an active participation in the public and political spheres of the country, as well as in different economic sectors, resulting in a few power groups which control the media. This causes not only social problems, but also a privileged advertising presence of companies belonging to an economic group in their own communication media. Campaigns are even used as means of control or censorship.

The two strongest media groups are Caracol and RCN, from the Santodomingo and Ardila Lülle groups, respectively. It is estimated that, today, more than 95% of homes have at least one television set, and more than 70% of Colombians usually watch at least one hour of daily programming.

<b>MEDIA GROUP</b>	<b>OWNER</b>	<b>% VIEWERS (EGM 2014)</b>
<b>CARACOL TELEVISIÓN (Caracol Televisión Caracol TV/EI Espectador   Valorem S.A)</b>	<b>Alejandro Santo Domingo</b>	<b>72 %</b>
<b>RCN TELEVISIÓN (RCN Televisión RCN   Radio Cadena Nacional S.A.)</b>	<b>Carlos Ardila Lülle</b>	<b>60%</b>
<b>CITYTV Citytv (Casa Editorial El Tiempo   Inversegovia S. A)</b>	<b>Luis Carlos Sarmiento Angulo</b>	<b>13 %</b>
<b>CANAL UNO (Canal uno)</b>	<b>RTVC – Public Media System</b>	<b>4 %</b>
<b>SEÑAL COLOMBIA (Señal Colombia)</b>	<b>RTVC – Public Media System</b>	<b>3 %</b>
<b>CABLE NOTICIAS (Cable Noticias Espectáculos Andinos S.A.)</b>	<b>Alberto Federico Ravell / Tobías Carrero Nácar</b>	<b>2 %</b>
<b>CANAL CAPITAL (Canal Capital)</b>	<b>Town Hall of Bogota</b>	<b>3 %</b>
<b>TELEPACIFICO (Telepacífico)</b>	<b>Sociedad de Televisión del Pacífico LTDA</b>	<b>2%</b>
<b>TELECARIBE (Telecaribe)</b>	<b>Canal Regional de Televisión del Caribe Ltda</b>	<b>3 %</b>
<b>TELEANTIOQUIA</b>	<b>Teleantioquia Departamento de Antioquia</b>	<b>4%</b>

*Table 2: Percentage of television viewers and media groups of the main open television channels in Colombia  
Source: MOM (2015)*

Colombia shows great advances in cable subscription television, reporting almost two million homes connected.

Some of the companies that provide this modality service produce their own content through local channels.

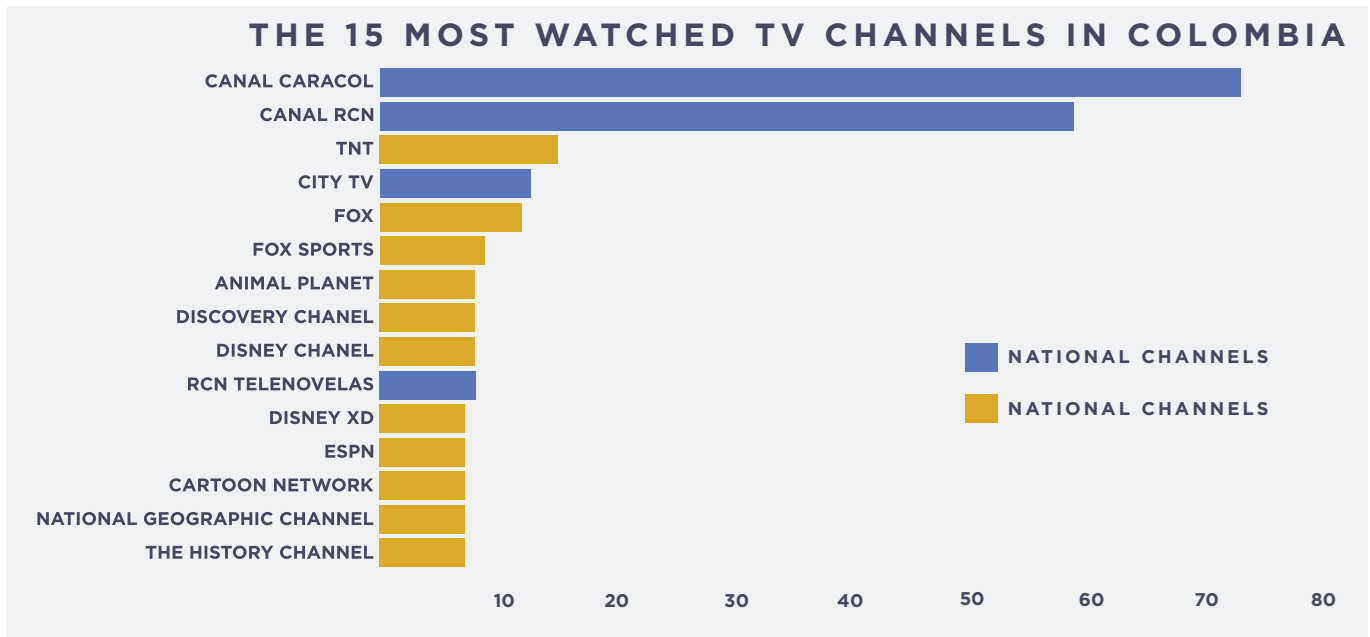


Figure 18: Top 15 most-viewed channels in Colombia Source: MOM (2015)

The main four television channels in Colombia with national coverage are Caracol, RCN, City TV and RCN Telenovelas, which concentrate 77.2% of audiences. The rest of existing

channels (43 channels) hold a 22.8% share. The most important public channel is Canal Uno, with a 2.1% share of audiences.

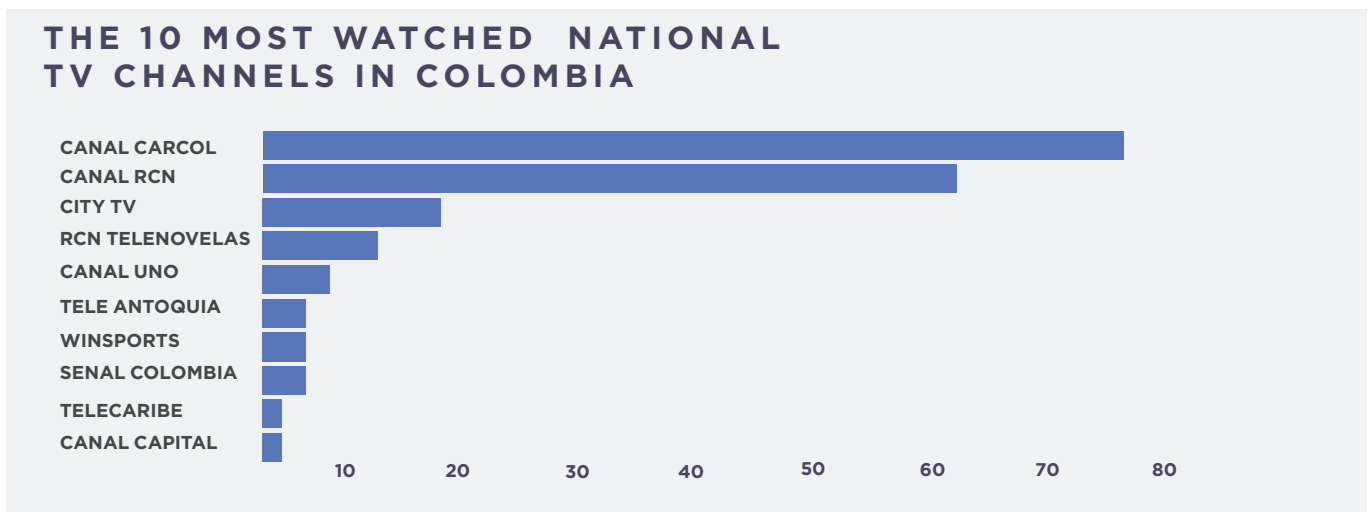


Figure 19: Top 10 most-viewed national channels in Colombia Source: MOM (2015)



Currently, private channels absorb 91% of the available advertising campaigns in television. The National Authority of Television revealed that, should this investment trend continue, in the next ten years, the advertising investment on television would reach 11.7 billion Colombian pesos, taking into account factors such as television access through the internet, streaming services and 4G networks.

La Voz Kids (The Voice Kids), for example, is a reality show broadcast Monday to Friday on Caracol Televisión with an average rating of 17 points during its screening. As the cost per rating point is 2,676,000 Colombian pesos for an exposure time of 30 seconds, a commercial during La Voz Kids would cost 45,492,000 Colombian pesos. This clearly explains why Canal Caracol holds 39.2% of the total television advertising expenditure. The other big share is held by the channel RCN, with 38.9%

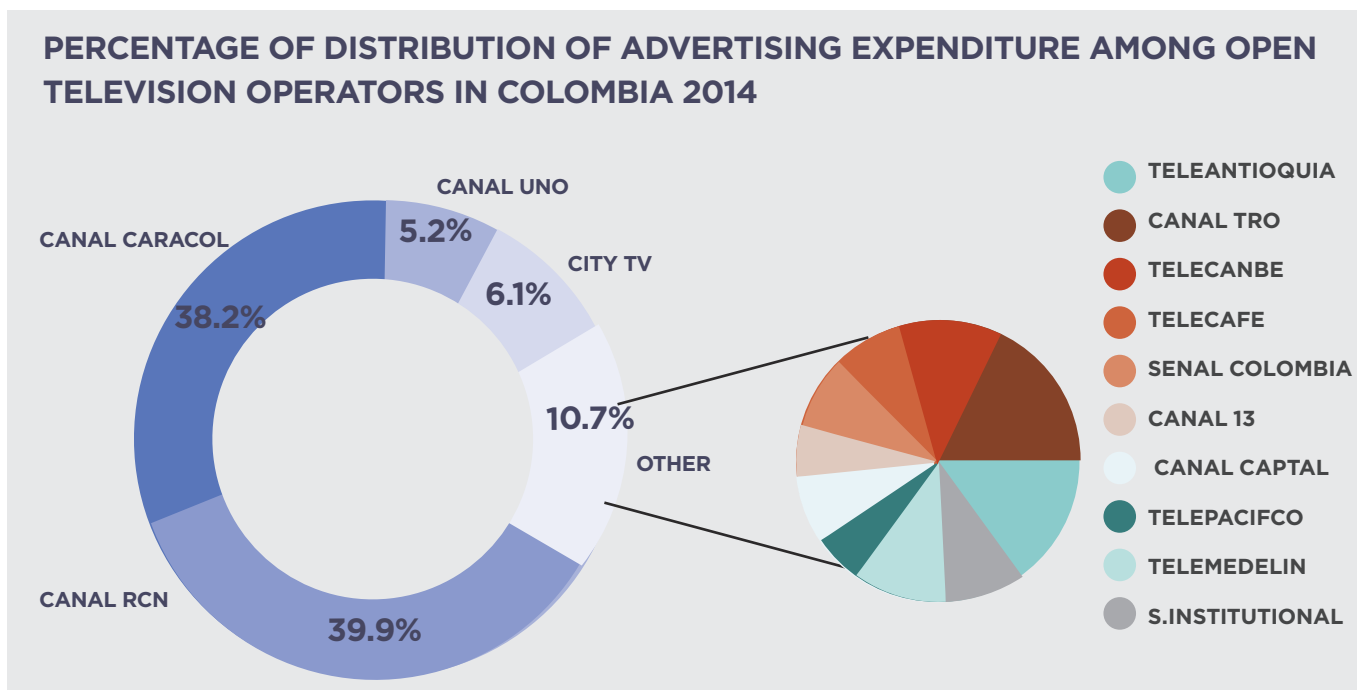


Figure 20: Percentage of Distribution of Advertising Expenditure among Open Television Operators in Colombia  
Source: MOM (2015)

Similarly to television, radio in Colombia is also characterised by an oligopoly. Colombia has one of the most developed radio ecosystems in the world, with an enviable coverage that has allowed it to keep an important participation within the advertising expenditure. Stations belonging to the Ardila Lülle Organisation and Grupo Prisa summate 59% of the country's total radio audience. If these stations are added to those belonging to Organización Radial Olímpica, then 73% of the total audience is centralised in three media groups.

**“Stations belonging to the Ardila Lülle Organisation and Grupo Prisa summate 59% of the country’s total radio audience. If these stations are added to those belonging to Organización Radial Olímpica, then 73% of the total audience is centralised in three media groups.”**

<b>MEDIA OR RADIO CHAIN</b>	<b>MEDIA GROUP / OWNER</b>	<b>% LISTENERS (EGM 2014)</b>
<b>OLIMPICA STEREO (Olímpica stereo Cadena ORO Organización Radial Olímpica S.A)</b>	<b>Char Family</b>	<b>21 %</b>
<b>CARACOL RADIO (Caracol Radio Cadena Caracol Grupo Prisa   Caracol Primera Cadena Radial Colombiana S.A.)</b>	<b>Polanco Family</b>	<b>13 %</b>
<b>W RADIO (W Radio Cadena Caracol Grupo Prisa   Caracol Primera Cadena Radial Colombiana S.A.)</b>	<b>Polanco Family</b>	<b>9 %</b>
<b>LA FM (LA F.m Cadena RCN RCN   Radio Cadena Nacional S.A)</b>	<b>Carlos Ardila Lülle</b>	<b>8 %</b>
<b>BLURADIO Blu Radio Cadena Blu Caracol TV / El Espectador   Caracol Televisión S.A.</b>	<b>Alejandro Santo Domingo</b>	<b>6 %</b>
<b>RCN LA RADIO La Radio Cadena RCN RCN   Radio Cadena Nacional S.A</b>	<b>Carlos Ardila Lülle</b>	<b>6 %</b>
<b>LA CARIÑOSA La Cariñosa Cadena RCN RCN   Radio Cadena Nacional S.A</b>	<b>Carlos Ardila Lülle</b>	<b>5 %</b>
<b>RADIO POLICIA NACIONAL Radio Policía Nacional Radio Policía Nacional Ministerio de Defensa</b>	<b>Ministry of Defence</b>	<b>4 %</b>
<b>LA REINA - 02 La Reina Cadena ORO Organización Radial Olímpica S.A.</b>	<b>Char Family</b>	<b>2 %</b>
<b>RADIO FANTASTICA - 02 Fantastica Cadena RCN RCN Radio Cadena Nacional S.A</b>	<b>Carlos Ardila Lülle</b>	<b>2 %</b>

*Table 3: Percentage of Listenership and Media Groups of Colombia's Main Radio Chains  
Source: MOM (2015)*

Radio consumption in Colombia increased 1.2%, reaching a total of 27,928,400 listeners in all the stations operating in the eighteen most important capital cities. Radio penetration hardly decreased 0.2%, for a total market penetration of 79.1%.

One of the advantages radio has is the “audience segmentation”, which means radio stations, through their format, greatly differ in the type and composition of their listeners, differentiating them by age, gender and socioeconomic level. Among the most relevant differences between spoken radio and music radio consumption is the

socioeconomic status which can be highlighted : 31% of the spoken radio audience belongs to medium and high class, while this rate for music radio is only 17%.

In the latest EGM report of 2015, the ranking of radio stations with the greatest number of listeners at a national level was revealed. Olímpica Stéreo, a tropical music station, is ranked the first. Number two and three are stations that program mixed content, including pop, rock and Anglo commercial music. Fourth place is also held by a tropical music station, Tropicana Stéreo. They all have wide slots of spoken radio, but they also include music slots.

### THE 10 MOST LISTENED TO RADIO STATIONS IN COLOMBIA

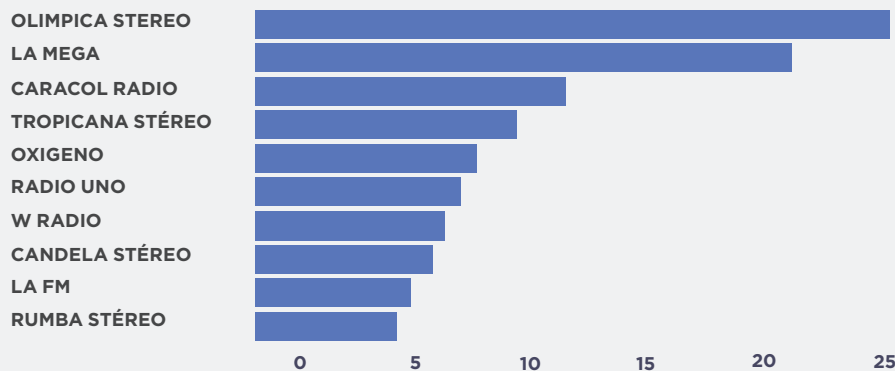


Figure 21: Ranking of Radio Stations by Listenership in Colombia  
Source: MOM (2015)

### 6.3 Specialist Media

**“Shock magazine was born in 1995 as one of the few and most complete ways to connect with music, fashion, art and youth culture through different platforms. It is printed and owned by El Espectador, one of the most important papers in the country...Despite belonging to such a strong mass medium, this magazine has created a musical community never before seen in the region, allowing it to branch out and create several franchised ‘products’.”**

There are several written media entities specialised in music

and, although many of them have a physical version, digital versions are the most visited ones. Their lives have not been constant, as proven by Rolling Stone Colombia, which opened in 2003 and was shut down after only five years of work and 58 editions. In 2013, it was re-launched and is currently still in existence, including in its printed editions much of the global and Colombian popular culture trends.

**Shock magazine** was born in 1995 as one of the few and most complete ways to connect with music, fashion, art and youth culture through different platforms. It is printed and owned by El Espectador, one of the most important papers in the country. El Espectador is part of the Santodomingo Group, which also owns Caracol Radio. Despite belonging

to such a strong mass medium, this magazine has created a musical community never before seen in the region, allowing it to branch out and create several franchised products. For example, there is Shock Fest, a festival that tours the country discovering and helping visualise bands and diverse genre proposals. Shock also has a concert platform that includes a partnership with the Julio Mario Santo Domingo Theatre, where talents such as María Mulata, Sebastián Yepes and Bomba Estéreo have been presented. Finally, the Shock Awards take place every year to recognise artistic and technical excellence in the arts and sciences of recorded music through public vote. They have become renowned awards in national and international music. Some of the awarded artists are Shakira, Juanes, Andrés Cepeda, Carlos Vives, Ilona, J Balvin, Silvestre Dangond and Fanny Lu.

**Bacanika**, a free bi-monthly edited magazine, was born in 2008. It is made by the university foundation Sanitas UNISANITAS and, apart from music, also discusses different issues related to juvenile reality. It includes convergence technology, social networking events, design, eccentricities, art and leisure content, socio-cultural issues, testimonies of experiences or anecdotes and, of course, reviews. Bacanika is an important music event promoter and, through reports and news, has positioned itself as a benchmark for the local culture.

**VICE** began operation in Colombia in February 2014 and, following the Montreal imported model, includes a magazine, events, online platform, television and documentaries. With its subproducts like Noisey and Thump, it has gained a very strong position among young Colombians from the main cities, telling stories and news differently than those found in the traditional media. They have created projects such as Pacifista, which is linked to the current Colombian peace process movement. Pacifista consists of a series of content about the conflict and peace in Colombia aiming to contribute to the creation of a historical memory.

**Noisey**, Vice's music channel, has just launched its local production *Tras Escenas*, an original video series produced in Colombia where the most original and explosive music scenes are depicted in a documentary style video.

Audiovisual production is something that many of the music-focused publications are using to make a difference. In this

sense, artistic dissemination projects also appear. They do not deem themselves journalists, but rather leave a record of today's scene. One such entity is **Amplificado TV**, a virtual channel that makes videos of music sessions at special places. Their motto is "the best music in Colombia" and they already hold a big catalogue of national artists such as Las Alegres Ambulancias, a Pacific folk group, and international artists such as Natalia Lafourcade and Los Tres. They currently have a programme on Saturdays that airs on Señal Colombia, the national public television.

#### **Main Media Contacts in Colombia**

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#### **6.4 Opportunities for Canadian Independent Artists**

With an effervescent music industry, it is natural that the media scene is also on the move. In Colombia, there is certainly a strong presence of power groups that, apart from being in control of many media platforms, also share investments on other economic and political spheres. This causes criticism, and being independent can to be a challenge that only a few have been able to win. However, there has been a movement coming from the necessity of a scene that requests the generation of new, fresh and different content. New mediatic actors in the Colombian music industry are betting on controversial topics and daring proposals and are willing to experiment. This is an opportunity to enter the market and create stories alongside those national artists making history. Proposing cultural exchanges between artists or consumers from different cities in Canada and Colombia or setting creative collaborations could be an excellent means of interacting with the industry. It becomes a cover letter and a kind of public relations agency that allows artists to express the idea they have in mind upon arrival to the country.

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## 7. VISA SYSTEM AND PRACTICAL INFORMATION

*Opportunities for Canadian Independent Music Companies in the Colombian Music Market*

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# 7. VISA SYSTEM AND PRACTICAL INFORMATION

It must be taken into account that entering as a tourist does not allow one to work or obtain a temporary labour visa in Colombia. Foreigners wishing to enter Colombia by virtue of a labour link or a contract for the provision of services, including as part of an art, sports or cultural group that enters the national territory with the goal of providing a public show, will need the TP-4 visa. The duration of the visa will equal that of the labour contract or the provision of services contract, not exceeding three years. This visa may have multiple entries. In the specific case of artistic groups, the established visa will be issued with a duration of up to six months. It is revoked if absent from Colombian territory for a period greater than 180 days.

The process can be carried out abroad (domestically, for Canadians) at the Colombian Consulates or in Bogota at the Office for the Coordination of Visas and Immigration. Should the procedure be completed by a representative, the power of attorney must be attached. Visas cost approximately 295 dollars total: US\$ 50 for the application fee and US\$ 245 for the visa itself.

When applying, all the required documentation may be submitted digitally following the procedures established in the following the link below.

More information on the type of documentation needed and payment methods can be found at [http://www.cancilleria.gov.co/en/procedures\\_services/visas/types](http://www.cancilleria.gov.co/en/procedures_services/visas/types).

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Opportunities for Canadian Independent Music Companies in the  
Costa Rican Music Market

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**Researcher:** *Ritza Elvir (Bajo Presión Records) & Sound Diplomacy*

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# 1. OVERVIEW

**“Canadian independent bands and companies would be able to enter the market by touring with a similar band, but it would be a big gamble arranging a solo tour due to the marketing and logistic efforts on the visitor’s end.”**

The business opportunities for Canadian independent artists and companies in the Costa Rican music sector appear to be limited. Several segments of the value chain have not developed locally in Costa Rica, which has affected independent artists but has encouraged mobility among the local musicians and professionals. Despite calling themselves ‘independent’, the reality is that the majority of bands and artists are DIY, since there are no independent record labels in Costa Rica anymore.

Most local artists have developed their touring structure locally and abroad through their managers, who are ultimately responsible for a band’s success in Costa Rica. By acting as booking agents, PRs, concert promoters and managers, agents try to build international networks that allow their bands to tour and publish their music abroad, in exchange for helping foreigners to tour Costa Rica. This has resulted in an underground venue circuit that provides performing opportunities to international acts around the metropolitan area of San José, albeit not so lucrative.

Due to the public support of music entrepreneurship, the Costa Rican music industry is expected to develop in the near future. At the moment, skills training is one of the industry’s priorities, since creativity is alive and well in the Costa Rican scene: there are around 400 active bands in the country. The underground music scene could evolve into an independent music industry with the allocation of appropriate resources, as well as investment and collaboration from foreign companies, especially independent record labels or publishers navigating the digital market.

## 1.1. Market Size and dynamics

Costa Rica has a population of 4.8 million, living mainly in urban areas. Its capital San José is home to 20% of the total population in the country. Among all Central American countries, it is considered to be the most politically stable,

with a well-developed social infrastructure.

Costa Rica has a rich variety of music, from classical to folk and contemporary. Their National Symphonic Orchestra, both the adult and the youth ensembles, are widely recognised in Latin America by their high quality of performance. Indigenous music such as Creole swing and Calypso coexist in nightclubs and live shows with mainstream commercial music.

San José hosts the main national and international music events in Costa Rica. The capital has about 13 venues where live music is programmed daily and 5 more venues where live music is programmed 3 days a week. The rural areas have little to no musical activity, since there are stricter regulations to produce live shows, and this applies as well to the more touristic coastal areas.

At the moment, it appears there are no publicly available figures on the revenues for recorded or live music in Costa Rica. Despite all the major digital music services being available in the country, consumption statistics from Costa Rica are included as part of the larger ‘Central America & Caribbean’ market in IFPI reports. Figures are being collected by FONOTICA, the local collective management organisation for the phonographic industry, but it was not possible to estimate the volume of sales in the different recorded market sectors for the Costa Rican market alone. At a glance, local trends in listening habits can be also identified by the top Spotify playlists such as ‘Costa Rica Pura Vida’, ‘Costa Rica: Rock y Pop’ and ‘Costa Rica Top 100’, largely composed of Latin and Dance hits.

## 1.2. How to navigate the Marketplace

Managers perform multiple roles in Costa Rica, due to a shortage of qualified industry professionals. They work frequently as booking agents, roadies or show producers besides their band work. It is common that managers represent several artists at the same time, too. At the moment, managers are actively developing industry skills, through regular meetings and workshops encouraging skill-learning. However, they don’t yet have a management union or a collective voice that represents them, which would be of great aid in improving their local music industry.

As the main agents in Costa Rica's music sector, managers are keen to do business with foreign artists and companies. Due to the small size of the music scene in the country, concerts have to be planned with a local agent to avoid playing an empty room. Independent music fans do not generally attend two shows in a row from artists of the same genre, but the underground circuit is in good health.

Canadian independent bands and companies would be able to enter the market by touring with a similar band. It would be a big gamble arranging a solo tour due to the marketing and logistic efforts on the visitor's end.

### 1.3. Trade conferences and industry gatherings

Industry events for the local professionals have been in place for 3 years now and are growing stronger. These are mostly focused on skills building through workshops and informative talks. Investment from foreign companies would help expand these events to more stakeholders, although the industry could also benefit from representation of an international industry event in Costa Rica.

Qualified industry professionals from Canada have a potential market in the training sector, since Costa Ricans are developing their infrastructure and investing in industry training. Among the existing programmes are:

- Short talks promoted by the Collective Collecting Societies (ACAM and AIE) and by the UTM (Union of Music Workers, Unión de Trabajadores de la Música), a trade union founded in 2014 and formed by music professionals. The organisations fund these talks, and can propose topics and potential speakers.  
**Contact:** Bernal Villegas, UTM President  
**Email:** [bvillegascr@yahoo.com](mailto:bvillegascr@yahoo.com)
- UCE (Culture and Economy Unit of the Ministry of Culture, Unidad de Cultura y Economía del Ministerio de Cultura) provides business training to encourage entrepreneurship in the cultural industries. There are no specific training programs for the music sector at the moment.  
**Contact:** Anahí Moyano, UCE coordinator.  
**Email:** [amoyano@mcj.go.cr](mailto:amoyano@mcj.go.cr)

- Seminar on music composition. Private initiative with support from the University of Costa Rica. They provide spaces for music analysis, master classes and concerts.

**Contact:** Alejandro Cardona, Director  
**Email:** [changoalaye@gmail.com](mailto:changoalaye@gmail.com)

- DJ Lab. Training space for those interested in electronic music and mixing. They provide Tracktor and Ableton Live certifications.

**Contact:** Esteban Howell, Director  
**Email:** [eh@djlabcr.com](mailto:eh@djlabcr.com)

A potential opportunity for Canadian independent bands and companies would be to connect with Costa Rican agents in any international event where they present showcases or have a delegate presence. This is particularly useful to find bands with a similar sound and their representatives. Some of the latest events they have participated at are Circularart (Colombia), BOMM (Colombia), WOMEX (Europe), Micsur (Latin America), FIM (Mexico), and the Latin Alternative Music Conference (New York).

**“Qualified industry professionals from Canada have a potential market in the training sector, since Costa Ricans are developing their infrastructure and investing in industry training.”**

## 2. RECORDED MARKET

### 2.1. Sales

In 2014, the Ministry of Culture estimated profits of 151 million colon (approx. CAD 358,953) from physical music exports. Other than that, figures on music sales of recorded music collected by FONOTICA are not publicly shared.

Independent bands and artists usually sell their music and merch at concerts and avoid intermediaries. The most popular formats to publish music are CDs, even though cassette tapes and flashdrives are also common. For merchandising, bands produce a variety of products that have high demand, such as t-shirts, stickers and key rings. It is estimated that recorded music sales by independent artists represent only 20% of their overall musical income.

On the other hand, local music that could be qualified as World Music is sold at bookstores, cafés, airports and other touristic areas.

Canadian independent bands and music companies should aim to enter the recorded music market either by collaborating with local bands and managers or through activities promoted by the Ministry of Culture and Youth.

**“Music is commonly sold around markets in San José and shopping malls, especially near the universities.”**

### 2.2. Retail

**“The most relevant retailer to independent bands would be Insomnio, a Rock and Metal retailer with 4 stores in the San José metropolitan area.”**

There are some independent record stores, mostly around the capital. Music is commonly sold around markets in San José and shopping malls, especially near the universities. There are a number of vinyl stores in place as well, but these stock mostly second hand material.

International, mainstream music is sold in cashpoints at supermarkets and convenience stores (Automercado, Más por Menos/Walmart, AMPM). This space is usually reserved for English-speaking mainstream bands, ballads and world music.

Insomnio is a local multimedia retailer with 4 outlets in the country. They sell music, DVD collectibles and collectible toys,

among other merchandise.

All in all, the most relevant retailer to independent bands would be Insomnio, a Rock and Metal retailer with 4 stores in the San José metropolitan area.

### 2.3. Mobile

**“The mobile market is booming across Central America and the Caribbean, with ringtones and ringback tones (mobile personalisation) taking second place in digital music consumption right after music streaming.”**

The mobile market is booming across Central America and the Caribbean, with ringtones and ringback tones (mobile personalisation) taking second place in digital music consumption right after music streaming. In 2015, mobile personalisation accounted for a value of US\$ 2.113 million in the Caribbean and Central America region.

State telecommunications company Kolbi launched the streaming app *kölbi música* in 2016, in collaboration with developer Kuack Media Group. The application includes over 25 million songs and has a monthly cost of 3,200 colon (around CAD 7.50) for a premium account. Figures on the number of users and revenues are not yet publicly available.

Claro Música is another music service available in Costa Rica, with a catalog of 15 million tracks accessible to Claro mobile users without using extra internet data. Ringtones and ringback tones are also available for purchase to Claro mobile users. Claro also sponsors programmes on the public TV channel VM (channel 29) and promotes advertising campaigns with artists.

There are many opportunities for foreign companies to invest in the mobile business areas, due to the increasing popularity and revenue of the mobile personalisation sector. Digital music aggregators are not yet popular among most Costa Rican artists and managers, and neither are digital distribution companies. As this side of the industry grows, there are good investment opportunities for companies working with both artists' teams and the mobile corporations that would further develop the music business infrastructure in Costa Rica.

### 2.4. Streaming

Streaming figures appear to be available only as part of

the whole Central America & Caribbean region by the IFPI. Streaming is the most popular digital consumption method for this region, with paid subscription/freemium streaming services revenues generating US\$ 3.531 million, while ad-supported streaming generated US\$ 4.384 million.

There is a large variety of digital services available in Costa Rica, according to the IFPI. These are Apple Music, Claro Música, Deezer, Google Play, Groove Music Pass, iTunes, Microsoft Music Store, Movistar, Napster and Spotify.

It is perceived that Youtube is the most popular streaming platform among Costa Rican artists, however most do not know how to currently monetise their uploaded music or videos. Spotify is perceived to be the second most popular streaming platform when it comes to integrating musical content.

Since there are no independent record labels in place, local musicians use digital aggregators for online distribution, namely Tunecore and CDbaby.

### 2.5. Physical and digital distribution

**“It is advisable to focus on the live market since the local industry has not developed record labels or any institution that could represent that role in their music ecosystem.”**

There is not an association or music industry organisation that develops public music distribution and monetisation statistics in Costa Rica. This is especially the case for independent artists, since they self-publish their music and sell it directly to their fans.

Independent bands are largely self-published, and commonly assume production and manufacturing costs of their music. Producing around 200 CDs represents a big investment for bands, since there are not any manufacturing companies in Costa Rica.

There is evidence of physical distribution of foreign catalogs handled in Costa Rica by Music Depot (Contact: María Estela Acosta Cadavid, CEO. Email: macosta@ddmcr.com). They operate directly with publishers and record labels to import CDs and sell them in Costa Rican retail spaces.

Because of the lack of distribution and retail channels, foreign independent companies entering the market would find it challenging to develop business in this area. There is a need for infrastructure investments to develop the distribution and publishing services (i.e. music distribution, catalogs, licensing, sync, etc.), especially online with the wide availability of digital music services.

### 2.6. Industry players

In Costa Rica, television and radio are state-owned, but private companies operate under broadcasting contracts. The main broadcasting groups are: Grupo Omega, Cadena Radial Costarricense, Central de Radios and Grupo Nación (contacts are available in section 6.3).

### 2.7. Trends

#### Tropical music

During the weekends, artists are booked to perform in dance halls and hired for popular celebrations and local holidays. They also offer their services to private companies. They have national reach and perform in a lot of rural areas. Main bands: Son de Tikizia, Erick Sánchez y su Orquesta y Son Mayor.

#### Mexico

There is a small group of artists who have close ties with Mexico and perform there regularly. This can be attributed to close connections with managers who have migrated to Mexico or relationships that have been built up through cultural exchanges and meetings at conferences and festivals. Some of these bands include 424, Las Robertas, ColorNoise etc.

#### Charanga

Party Bands play 3 or 4 times a week. They are highly sought after for private parties and for venues (paid using revenues from entrance fees, or by the event). They have national reach and perform in many rural areas too. Main bands: Los Ajenos and la Kuarta.

#### Reggae

There is a national reggae movement. There are two bands that leave the country constantly (Un Rojo Reggae Band and Ojo de Buey). They generally go to Mexico and Colombia.

### Ska

There are ska bands who also have a presence in Mexico. These bands include Mentados and Percance.

### Jazz

There are weekly concerts on Mondays at Jazz Café San Pedro and jam sessions on Tuesdays at El Sótano. The Costa Rican Cultural Center (Centro Cultural Costarricense Norteamericano) has an annual Jazz Festival, which is funded by the US government and receives university music school students. There is very little national participation.

### Electronic music

There is a large choice of electronic music events in the country.

### Urban

Great content generators for social media. This is the genre that has more views on YouTube and one of the genres with the widest reach in the country.

### Metal

Costa Rica has a very active local scene. They usually do a lot of merch and records in physical format. Metal fans in Costa Rica usually spend more in merchandising than other genres' followers.

### Indie

Indie rock bands are largely based in the west of San José, it represents a niche genre but is very welcomed by its audience. Indie bands perform frequently in bars across San José's metropolitan area.

## 2.8. Strategies

**“Another possible path for collaboration would be through the Ministry of Culture and Youth (Ministerio de Cultura y Juventud), creating reciprocal exchange programmes with the Canadian government.”**

It is advisable to focus on the live market since the local industry has not developed record labels or any institution that could represent that role in their music ecosystem. Costa Rica is an emerging market, even though it is still articulating and developing its business model. On a local level, there are very few companies working in the music industry, most of them included in the annexed contact list in this document.

It is noted that one of the most relevant independent record labels in Costa Rica was *Autómata Records*. This company managed recording and mastering of their artists' albums, as well as booking and PR services. They were pioneering in

the local scene by selling their albums for US\$ 2 online since 2011, a model that hoped to make Costa Rican music more attractive and increase sales across Latin America. However, the label quietly stopped their business activity around 2013.

In comparison, the recorded music market for World Music genres appears to be the most present across Costa Rica. World Music CDs can be bought at many retail spaces in Costa Rica, namely supermarkets, cafés, the airport and even convenience stores. Local label *Papaya Music* works mainly reissuing indigenous music from Central America and supports local independent artists from the World Music genre.

Another music business that did not survive the Costa Rican market dynamics was *Vibratica.com*, an online music retailer launched in 2009 by local entrepreneur *Eddie Israelsky*. This service was oriented towards local content and appealed mainly to Latin American audiences, with music downloads available for US\$ 1. *Israelsky* recognised in an interview that the difficulties of the local market made it challenging for the company to grow, ceasing activities in 2013.

In order to enter the recorded music market, collaborating with Costa Rican independent artists would be the most suitable path for Canadian independent artists. Local independent bands mainly sell their music at concerts, and this may as well be used by Canadians to develop a fanbase and sell records. Artist managers are key partners in this strategy, since they know the local music industry, travelling frequently to international gatherings to expand their network.

Another possible path for collaboration would be through the Ministry of Culture and Youth (*Ministerio de Cultura y Juventud*), creating reciprocal exchange programmes with the Canadian government.

For Canadian independent music businesses, an example of how to enter the market could be provided by the Guatemalan indie label *Bajo Presión Records*, a company that also collaborates with European bands. *Bajo Presión* started entering the Costa Rican market in 2013, a move that was preceded by frequent tours of the label's artists. By entering the indie rock and hardcore live circuit first, *Bajo Presión* has been able to grow their business in Central America and expand their network, as well as improve all aspects of concert production in Costa Rica, from bookings to hospitality.

## 3. LIVE MARKET

**“Live shows are the best opportunity for Canadian independent artists and companies to enter the Costa Rican market. The largest audience for independent music is located in the independent (underground) circuit, which is perceived to reach further than independent music on broadcast or streaming in Costa Rica.”**

Live shows are the best opportunity for Canadian independent artists and companies to enter the Costa Rican market. The largest audience for independent music is located in the independent (underground) circuit, which is perceived to reach further than independent music on broadcast or streaming in Costa Rica. Touring is also the most profitable activity for independent bands, since they can directly sell their music and merchandise to the public. The intimacy from concerts engages particularly with the Costa Rican audience, which eventually will allow their artists

to tour the same location again.

In Costa Rica, there are venues with over 10,000 people capacity (mostly for international mainstream artists), and smaller venues (from 200 to 700 capacity). The independent live music scene is mainly centered around San José, and there is also an independent music venue venue in Alajuela (Parque Viva). There are currently 12 venues programming music during the week in the capital, even though not all venues meet basic technical requirements.

The following multi-genre venues in Costa Rica programme music regularly: Around the Western region of the Alajuela province (‘Occidente’), there is an emerging live music scene led by local producing company 4 Gatos. Five venues are regularly programming concerts with an attendance of 100-250 people at each show.

VENUE	LOCATION	CAPACITY	PROGRAMMED GENRES
Jazz Café San Pedro	San Pedro	300 px	All kinds of genres
Jazz Café Escazú	Escazú	600 px	All kinds of genres
Amón Solar	Barrio Amón	300 px	Only original music
El Sótano	Barrio Amón	60 px	Only original music, jazz and blues
Mundoloco	San Pedro	400 px	All kinds of genres
El Observatorio	Barrio la California	400 px	All kinds of genres
El Cuartel de la Boca y el Monte	Barrio la California	300 px	All kinds of genres
La Concha de la Lora	Barrio la California	250 px	All kinds of genres
La Cali	Barrio la California	300 px	All kinds of genres
La Teta de Malta	Barrio la California	100 px	All kinds of genres
Arenas Skate Park	San José Centro	300 px	All kinds of genres
Hoxton	Los Yoses	300 px	All kinds of genres
Parque Viva	La guacima	15000 px	All kinds of genres
Peppers	Zapote	2000 px	All kind sof genres



**“In Costa Rica, promoters and managers commonly act as booking agents. Managers work with other local artists, but they try to encourage and grow international relationships with other agents. Usually, deals are reciprocal so their Costa Rican artists can tour abroad, too.”**

#### 3.1. Promoters

International promoters:

1. Doble Jota Producciones – Karla Cerrano - [serranoardon75@gmail.com](mailto:serranoardon75@gmail.com)
2. Jakamo Producciones – Luis Jakamo - [jakamo15@hotmail.com](mailto:jakamo15@hotmail.com)
3. Latina Producciones – Arlette Arroyo - [arlettearroyo@yahoo.com.mx](mailto:arlettearroyo@yahoo.com.mx)
4. LIFE CR – Juan Manuel Espinar - [juanmaespinar@lifecr.com](mailto:juanmaespinar@lifecr.com)
5. Move Concerts – Andres Guapina - [andres@moveconcerts.com](mailto:andres@moveconcerts.com)
6. FLEVENT – Luis Arias - [luis@fleventcr.com](mailto:luis@fleventcr.com)
7. Roberto Montero – [contacto@agenciadecontenido.com](mailto:contacto@agenciadecontenido.com)
8. Interamericana – Flor Carreras - [flor@interdepro.com](mailto:flor@interdepro.com)
9. One CR – Juan Carlos Campos - [juancarlos@onecr.com](mailto:juancarlos@onecr.com)
10. Envisión – Luigi Jimenez - [luigij@gmail.com](mailto:luigij@gmail.com)
11. Producciones QFA – Fernanda Alvarado - [fernandoa@qfacr.com](mailto:fernandoa@qfacr.com)

These production companies usually work with mainstream international artists. Examples of past productions include Latin superstars Chayanne, Marc Anthony and Ricardo Arjona, but also Aerosmith and Justin Bieber.

There are only a few independent music promoters, mostly working with local bands. These are some of the most

relevant ones, considering that most of the time concerts are promoted by the bands and the managers themselves. A complete list can be found in the Annex to this report.

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MOLOTE - [molotecr@gmail.com](mailto:molotecr@gmail.com)

Promosonica - Lawrence Casal - [info@promosonica.com](mailto:info@promosonica.com)

#### 3.2. Booking agents

In Costa Rica, promoters and managers commonly act as booking agents. Managers work with other local artists, but they try to encourage and grow international relationships with other agents. Usually, deals are reciprocal so their Costa Rican artists can tour abroad, too.

Since there are almost no intermediaries in the music value chain in Costa Rica, independent bands generally receive all of the box office revenue, except for the 15% to 20% commission that goes to the booking agent (manager/independent promoter).

#### 3.3. Festivals

##### 3.3.1. Showcase

**Name of the Festival :** FIA

**Description:** Interdisciplinary governmental festival

**Since:** 1989

**Contact:** Application in CEPAC

**Location:** San José

**Genre:** Various

**Attendance:** 3000 px

**Tickets:** Free

**Name of the Festival :** Epicentro

**Description:** Indie music private festival

**Since:** 2013

**Contact:** Web

**Location:** San José

**Genre:** indie

**Attendance:** 1000 px

**Tickets:** ¢10 000

### 3.3.2. Summer

**Name of the Festival :** Envision

**Description:** A mix of people from all over the world gathered to share an elevated experience of culture, spirit and community in breathtaking nature

**Since:** 2011

**Contact:** luigi@envisionfestival.com

**Location:** Ubita Puntarenas

**Genre:** World music

**Attendance:** 10 000 px

**Tickets:** ¢89

**Name of the Festival :** Fiestas Palmares

**Description:** Community festival. Popular for beer sponsors

**Since:** n/a

**Contact:** info@fiestaspalmares.com

**Location:** Palmares Alajuela

**Genre:** POP, urban, tropical

**Attendance:** 50 000 px

**Tickets:** Free

### 3.3.3. City

**Name of the Festival :** Oktoberfest

**Description:** Gastronomic festival with international and national beers and concerts

**Since:** 2014

**Contact:** Flevent, info@fleventcr.com

**Location:** Parque Viva

**Genre:** National and Latin American music

**Attendance:** 10 000 px

**Tickets:** ¢10 000

**Name of the Festival :** Pazland

**Description:** Electronic music concerts

**Since:** n/a

**Contact:** Promosonica, info@promosonica.com

**Location:** Turrialba

**Genre:** Electronic Music concerts

**Attendance:** 20 000 px

**Tickets:** Free

**Name of the Festival :** Festival de Guitarra

**Description:** Classic guitar festival

**Since:** 2000

**Contact:** Jorge Luis Zamora, zamoguit@yahoo.es

**Location:** San José

**Genre:** Classical

**Attendance:** 1000 px

**Tickets:** ¢5000

**Name of the Festival :** Coca Cola Fest

**Description:** N/A

**Since:** 2016

**Contact:** Flevent, luis@fleventcr.com

**Location:** Alajuela

**Genre:** n/a

**Attendance:** 15 000 px

**Tickets:** Free

### 3.3.4. Multi-arts

**Name of the Festival :** Transitarte

**Description:** Interdisciplinary municipal festival

**Since:** n/a

**Contact:** Municipalidad de San José

**Location:** San José

**Genre:** Various Genres

**Attendance:** 20 000 px

**Tickets:** Free

**Name of the Festival :** FIA (Festival Internacional de las artes)

**Description:** International festival of the Ministry of Culture and Youth

**Since:** 1989

**Contact:** Application in CEPAC

**Location:** San José

**Genre:** Various Genres

**Attendance:** 30 000 px

**Tickets:** Free

### 3.3.5. Genre

**Name of the Festival :** Ska contra ska

**Since:** 2007

**Contact:** Geovanni Durán, elguato@yahoo.com

**Location:** Zapote, San José

**Genre:** Ska

**Attendance:** ₡3000

**Name of the Festival :** Costa rock

**Since:** 2006

**Contact:** Geovanni Durán, elguato@yahoo.com

**Location:** Zapote, San José

**Genre:** Rock

**Attendance:** ₡3000

**Name of the Festival :** Festival de Jazz Costa Rica

**Since:** n/a

**Contact:** Centro Cultural, mariajose.calvo@centrocultural.cr

**Location:** San José

**Genre:** Jazz

**Attendance:** Free

#### 3.4. Touring structure

Promoters usually help coordinate the logistics of tours with foreign bands, such as producers/promoters 4Gatos or Molote.

Due to the size of Costa Rica, bands can travel easily throughout the country. The longest cross-country car or bus trip can take 4 hours. It is common that bands performing as part of an exchange can stay for discounted rates at local hotels and hostels.

San José has the most venues in Costa Rica and also the highest technical standards. Most venues there have PA and Backline, which is not so common in the outskirts of the capital. Outside of central San José, bands usually would have to rent their sound equipment. Touristic areas along the coastline would welcome foreign bands performing in small venues/bars, even though technical resources may not be of high standards.

Security is rarely a problem, since there is not usually violence at live music venues or performances, and private security is hired at the larger events.

Although it is not always the case for live music venues, in festivals it is the norm to have minimum standard fees, especially for international artists. For the average Canadian independent band, it would vary between US\$ 500 to \$1,500 depending on expected ticket sales.

#### 3.5. Fees and logistics

Canadian artists planning to come to Costa Rica should invest in positioning their band to the local audience. Through local managers, Canadians should create ties with one or more bands that share a similar audience. Although the market is limited, it could be big enough to offer more than one concert in San José during the same week.

A typical plan for the first visit to Costa Rica would be for promotion, to raise awareness of Canadian independent music. Bands (or their sponsor) would have to invest in this first promotional trip, with estimated earnings of US\$ 600 per show in a best-case scenario, since profits would be split with the local band they partner with.

San José's Metropolitan Area should be the main focus for performing opportunities. The local tour manager would arrange and provide transportation & lodging as part of the production expenses. If a Canadian independent band were selected to perform at a state-organised festival, the government would provide transportation, food and lodging, in addition to the previously negotiated fee.

Many venues offer backline, but local artists prefer to bring their equipment to ensure the quality of their performance. This can be easily shared or split with the local touring band/s that Canadians partner with.

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## 4. PUBLISHING MARKET INFORMATION

*Opportunities for Canadian Independent Music Companies in the Costa Rican Music Market*

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# 4. PUBLISHING MARKET INFORMATION

**“Access to radio is very difficult for independent bands. Local music makes up around 10% of broadcasted audio, which is dominated by current mainstream hits and romantic ballads.”**

### 4.1. Collection societies regime

Foreign artists must register with the local collection societies in order to earn royalties from the local management organisations. Fees collected are distributed to the foreign societies for live music events with over 10,000 attendants. Because of this, it is advisable that only artists performing in an event of this characteristic register, due to the bureaucracy and costs involved.

ACAM (Asociación de Compositores y Autores Musicales de Costa Rica) is the main collection society, representing composers and music authors. This administration has reciprocal agreements with SOCAN.

Contact - Patricia Fernandez, International Relations (gillam.ramirez@acam.cr).

AIE (Asociación de Intérpretes y Ejecutantes Musicales de Costa Rica). This collection society collects neighbouring rights and represents local and international artists and phonographic producers. They are a member of IFPI and manage catalogs from majors as well as independent labels.

Contact - Esteban Monge (estebanmong@gmail.com)

National Theater and Municipalities (Teatro Nacional y municipalidades). Compliance services for international events organised by the government.

Contact - Marianela Munoz (+506 2010-1100 - ext. 1137 mborbon@teatronacional.go.cr, fiscalia@teatronacional.go.cr)

### 4.2. Sync Opportunities for English catalogues

Most Central American advertising companies have offices in Costa Rica. However human and creative resources for spots, including music, are sourced locally.

The Film and TV sectors in Costa Rica are currently blooming, mainly from internal collaboration between Costa Ricans. These sectors benefit largely from multilateral agreements between two or more countries, but outside media funding schemes, there are little opportunities for independent Canadian artists and businesses.

Access to radio is very difficult for independent bands. Local music makes up around 10% of broadcasted audio, which is dominated by current mainstream hits and romantic ballads.

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## 5. SECONDARY MARKET INFORMATION

*Opportunities for Canadian Independent Music Companies in the Costa Rican Music Market*

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# 5. SECONDARY MARKET INFORMATION

### 5.1. Gaming

The gaming sector in Costa Rica has recently received support from the Ministry of Culture. There are currently 3 entrepreneurship projects developing, but because of their financial limitations they work with stock music. There is a future possibility to provide catalog and sync services in this sector, since the local market is currently not providing them.

### 5.2. Merchandise

Independent artists consider that merchandise sales account for a large part of their incomes, but there are no official reports on these figures. Bands usually invest in printing T-shirts, hats, stickers, patches, and other merchandise, often in 'limited editions' to make it more attractive for the fans. This merch production is handled by a 'friend' that can produce small batches, not by professional merchandising companies.

Merchandise is mainly sold at their live shows, since it is noted that fans would rarely shop for their music at merch stores (i.e. Insomnio) or online retailers. Managers of independent bands estimate that around 85% of people attending their shows are between 18-25 years old, mainly university students linked directly to the local artistic scene. Managers argue that the average local fan spends less on merchandise at an indie music show than a foreigner or someone outside the San José area would do at the same event.

### 5.3. Brand engagement

Artist and music event sponsoring is not yet developed in Costa Rica. There have been cases of local bands and events sponsored by brands, mostly directed to local audiences in the scope of promoting local culture. This makes sense to the local market, since familiarity is very important in advertisement. Costa Rican companies prefer local celebrities, but international brand engagement also exists.

The following are examples of brand collaboration in Costa Rica:

**Kolbi:** Artist sponsor, concert stage sponsor, large scale concert sponsor.

**Claro:** Artist sponsor, concert stage sponsor, large scale concert sponsor.

**Bavaria:** Artist sponsor, concert stage sponsor, large scale concert sponsor.

**Imperial:** Festival Imperial, artist sponsor, concert stage sponsor, large scale concert sponsor.

**Red Bull:** Medium and large concert sponsor, international communication.

**Banco Nacional:** Artist sponsor, concert stage sponsor, large scale concert sponsor.

**Banco de Costa Rica:** Artist sponsor, concert stage sponsor, large scale concert sponsor.

### 5.4. Other players

Costa Rica's state government invests in music through event production (festivals, community festivals, fairs, concert series, etc.). This is handled through different organisations, namely the Central Government, the Ministry of Culture, city halls and public and private universities.

**“Managers are responsible for promoting artists to public events, since most line-up slots are awarded after a tendering process.”**

Managers are responsible for promoting artists to public events, since most line-up slots are awarded after a tendering process. It is common for managers to promote foreign artists in exchange for the promotion of Costa Rican bands in the artists' home countries. Having a local representative is advised, due to the high bureaucratic process of engaging with the Costa Rican government.

**Examples of state-produced events that include music:**

**Name of the Festival :** Transitarte

**Description:** Multi-disciplinary festival

**Contact:** Municipalidad de San José

**Location:** San José

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## 5. SECONDARY MARKET INFORMATION

### *Opportunities for Canadian Independent Music Companies in the Costa Rican Music Market*

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**Name of the Festival :** FNA (Festival Nacional de las Artes)

**Description:** Multidisciplinary festival organised by the Ministry of Culture for communities outside the San José metropolitan area

**Since:** 1989

**Contact:** CEPAC

**Location:** Regional, outside of the San José metropolitan area

**Genre:** Various

**Attendance:** 30 000 px

**Tickets:** Free

**Name of the Festival :** FIA (Festival Internacional de las artes)

**Since:** 1989

**Contact:** CEPAC

**Location:** San José

**Genre:** Various

**Attendance:** 30 000 px

**Tickets:** Free

**Name of the Festival :** Festival Farol

**Description:** Interdisciplinary community festival

**Since:** 2015

**Contact:** N/A

**Location:** West of Alajuela

**Genre:** Latin music

**Attendance:** 5000 px

**Tickets:** Free

**“Managers argue that the average local fan spends less on merchandise at an indie music show than a foreigner or someone outside the San José area would do at the same event.”**

### 5.5. Publishing for recorded music

Independent artists in Costa Rica rarely register their published work with the local collective management associations, since royalties are only collected at large-attendance events and broadcasts (over 10,000 people). Canadian independent artists could register with the local associations to collect their revenues, but the process is long and expensive, which is why most foreign touring bands tend to avoid registration.

Published music in Costa Rica comes mainly from the major labels. Independent artists would have to register with ACAM and AIE to earn royalties abroad when they perform at international festivals.

## 6. MEDIA AND PR

### 6.1. How the PR market works

Managers of local bands in Costa Rica perform the role of public relations agents. They arrange meetings, press releases, presentations and any kind of deal. There is no record of Music PR agencies in Costa Rica that have worked with independent artists.

Concert promoters are responsible for arranging press releases, publicity and press coverage for the event, for which they hire a regular PR/advertising agency or freelancer. Approximate fees for these services are between US\$ 700 to \$ 1,500. For smaller, independent concerts, the local band is responsible for the promotional aspects of the event, which is ultimately done by their manager.

### 6.2. Media and PR opportunities for Canadian content

Because managers are the key agents in the music industry in Costa Rica, they serve as the gatekeepers to the musical sector. Managers are very international-oriented, since they want their bands to tour abroad in exchange for foreign bands to perform in Costa Rica. As part of a joint tour, coherent PR opportunities for Canadian content would be linked to a sooner or imminent performance of such bands at a Costa Rican event.

### 6.3. Key media and PR contacts

**Contact:** [cesar.blanco@prensalibre.co.cr](mailto:cesar.blanco@prensalibre.co.cr)

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**Title:** Programmer

**Sector:** Radio

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**Company:** 7 estrellas

**Title:** Producer

**Sector:** TV

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**Company:** 7 estrellas

**Title:** Director

**Sector:** TV

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**Title:** Journalist

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**Title:** N/A

**Sector:** Radio

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## 6. MEDIA AND PR *Opportunities for Canadian Independent Music Companies in the Costa Rican Music Market*

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**Title:** News Director

**Sector:** TV

## **7. VISA SYSTEM, TAX WITHHOLDING POLICY AND OTHER PRACTICAL INFORMATION**

Visitors entering Costa Rica have to provide proof of a return ticket or continuity of travel, proof of having enough resources to be in the country (at least US\$ 100 for each month in Costa Rica) and a passport in good condition. Canadian citizens can enter the country with a passport expiration of 1 day after the projected exit of the country. Exit taxes are US\$ 26, to be paid in US dollars, colons or by card.

Even though Canadians traveling to Costa Rica do not need permits for stays of 90 days or less, there is a special category for artists and entertainers entering the country.

The requirements to provide in advance to the General Directorate for an artist permit are the following:

Request addressed to the General Director, signed by the person responsible of the event, whose signature must be authenticated by a competent officer for the reception of this kind of request or otherwise by a lawyer. This request should include the following information:

1.1 Basis of the claim, explaining the reasons for the request of the public spectacle.

1.2 Data from the organizer of the event, namely:

- a.** Given name and last name
- b.** Nationality
- c.** Profession or occupation
- d.** Exact address in Costa Rica
- e.** Indicate the period that the foreigner intends to stay in Costa Rica
- f.** Fax to receive notifications
- g.** Date and signature

1.3 Details of the foreigner who intends to perform the event, namely:

- a.** Given name and last name
- b.** Nationality
- c.** Profession or occupation
- d.** Intended address in Costa Rica
- e.** Migratory place whereby the foreigner intends to enter the country
- f.** Date

Original and copy or certified copy of valid identity document of the head of the event.

Notarized copy of the page of the passport of the foreigner who seeks to perform the event which includes a photograph and personal information.

Original and copy or certified copy of the contract between the artists and the head of the event.

Provide authorizations issued by the Office of Public Entertainment of the Ministry of Justice and Peace (Oficina de Espectáculos Públicos del Ministerio de Justicia y Paz) and the Attorney's office of the National Theatre Public Performances (Fiscalía de Espectáculos Públicos del Teatro Nacional), both for the entire term of the event.

This procedure can be done at the local Costa Rican consulate in Canada, but it can also be filled in by a third party with power of attorney.

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**Báez, E. (15 September 2009).** Nueva red social para la música tica. [Online] Retrieved from <http://redcultura.com/php/Articulos310.htm>

**Dirección General de Migración y Extranjería.** "Artist permits". [Online] Retrieved from [http://www.migracion.go.cr/extranjeros/visas/visas\\_ingles/ARTISTS%20PERMITS.pdf](http://www.migracion.go.cr/extranjeros/visas/visas_ingles/ARTISTS%20PERMITS.pdf)

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Opportunities for Canadian Independent Music Companies in the Cuban Music Market

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# 1. OVERVIEW

The business opportunities for Canadian companies in the music sector are limited. Foreign companies in general have few chances to partake in commercial or lucrative activities within the music sector, sparing that of the recorded market or through promoting Cuban artists in shows abroad. Those international artists which are successful in Cuba are supported by foreign sponsors who cover the costs of production and artist fees.

**“Canada accounts for the largest portion of Cuba’s tourists, with over 1 million visitors per year.”**

## 1.1 Market size and dynamics

The music market in Cuba is broad and dynamic, conditioned by tourism demand. The tourism sector has a considerable lean towards cultural activity and, further specified, music. Live Cuban music can often be found at every Cuban hotel, a distinctive mark of Cuba’s activity to promote tourism and cater to touristic desires.

There are five main tourist hubs in the country: La Habana, Varadero, Cayo Santamaría, Cayo Coco and the Holguín province. There is also great potential in the province of Santiago de Cuba, the most Caribbean city in the country, which boasts a rich musical heritage. Here, important cultural events are celebrated each year, attracting many foreign visitors. The music programmed in this region’s hotels is categorised as either traditional Cuban music or concert music, with the latter referring to pianists, choirs, string quartets, jazz ensembles, Bolero and Canción.

Tourism is growing to sustainability in Cuba. The restoration of diplomatic ties with the United States will only invigorate this sector, and it has generated interest in other countries, whose residents have also begun to visit the island. Canada accounts for the largest portion of Cuba’s tourists, with over 1 million visitors per year. There are large parties, national holidays and a plethora of musical events held each week that drive this demand. Live music can be found in every Cuban city, produced in open spaces and cultural institutions built within the communities for public entertainment. Often, the featured music is traditional Cuban music to cater to the local communities.

Local Cuban music events are growing each year, both in amount of events and numbers of attendees. The demand for Cuban music outside of the country is also on the rise, and musical services are now offered in several different countries, including Mexico, USA (despite not being able to earn money due to the commercial trade embargo), Western Europe, China, Colombia, Ecuador, Peru and Venezuela.

Cuba takes part in international industry events such as Womex, Midem and the Grammys. In September 2016, Cuba presented their new music industry event Primera Linea, which will take place every year in La Habana with the presence of 400 delegates (75 foreign and 325 domestic).

At Womex, Cuba has been present for 20 years of the event’s 30-year run, assisting in the promotion and sales of the country’s music and often achieving great results. Several Cuban musicians have been showcased and programmed there. In fact, the new Cuban conference Primera Linea was created in conjunction with the organisers of Womex. Cuba also began attending Midem 20 years ago, not only to promote recorded music but also to conduct licensing deals.

Every year, several Cuban productions are nominated for Grammys, and the country boasts wins in a variety of categories alongside wide recognition within the event itself. The country has been taking part in the awards for over 30 years.

Cuba has over 17,000 professional musicians in the country. They are assisted by over 25 agencies or businesses in a network of connected institutions all over the country. There are over 15 music events held each year, and over 50 cultural events altogether. It is worth noting that, when international events with foreign bands take place in the rural parts of the country, they do not earn any money in exchange. Companies that hire foreign businesses for artistic services are: Centro Nacional de Música Popular, Centro Nacional de Música de Concierto, Empresa Ignacio Piñero and Empresa Antonio María Romeu. These businesses have to be approached through their umbrella organisation, the Cuban Institute of Music (Instituto Cubano de la Música).

**“The Ministry of Culture has a digital portal called Cubarte, a website from which local cultural matters, such as cultural and artistic events, are disseminated.”**

### 1.2 How to navigate the marketplace

The Cuban music market is a broad national network of events, activities, actions, institutions, municipalities and other agents, connected by cultural institutions and the government systems. This system receives petitions and processes and executes them. Freelancers ('cuentapropistas') can be integrated into this system if their economic activities are related to artistic services. 'Cuentapropistas' are private businesses authorised by the government to operate. All entities need to request permission from the government to hire professional artists through their representative agencies.

Every representation and management agency develops the entire professional career of the artists on their rosters. These agencies are part of the aforementioned network of national institutions, which itself is the entry point in processing contracts for their artists' overseas operations. The artists in every agency's roster are managed through this structure, which is comprised of directive, administrative, commercial and technical bodies.

Many of the institutions taking part in this network also allow collaboration between and programming of foreign bands, such as Gran Teatro de La Habana, Teatro Mella, Teatro Nacional de Cuba and Teatro Bertolt Brecht in Havana; Sala White in the province of Matanzas; Teatro Terry in Cienfuegos; Teatro Heredia and Sala Dolores in Santiago de Cuba; Teatro Eddy Suñol in Holguín; Teatro Milanés in Pinar del Río; and Teatro La caridad in Villa Clara. This institutional network also includes the domestic record labels in the country (EGREM, BISMUSIC, ABDALA, COLIBRI), which belong to the Ministry of Culture.

There are also institutions for academic and heritage topics that have links with foreign entities, boasting years of experience working internationally.

Each institution has its own website and social media platforms in order to promote their work and further develop their ties.

The Ministry of Culture has a digital portal called Cubarte, a website from which local cultural matters, such as cultural and artistic events, are disseminated. The site has received international recognition for its work in the international

promotion of Cuban events and artistic life, since anyone in any country can access the information and contact cultural entities through the platform. Cuba still has connectivity issues due to its broadband limitation and the lack of access to the internet for everyone, although the island expects all its inhabitants to be fully connected in 5 years time.

### 1.3 Trade conferences and industry gatherings

#### **AMPM Cuba (América x Su Música)**

**Date:** June

**Scope:** International

**Regularity:** Yearly

Theme: For 2016, the themes were music journalism, music curation and Latin American music communication in general. There are professional activities, debates, panels and presentations from journalists and media. Participating music journalists in 2016 came from Cuba, Latin America, Spain and the US and members of the Network of Music Journalists of Latin America (REDPEM.IB) conducted an academic workshop on music journalism. Among other activities in the festival were an open brainstorming session to explore music and tech, film sessions, a forum for music as a tool to fight gender violence, exhibitions, business pitching, and concerts from alternative Latin American bands.

**Location:** **Fábrica de Arte Cubano (FAC) & Casa de Las Américas, La Habana**

**Organiser:** **Fábrica de Arte Cubano (FAC)**

**Contact:** [ampm.cuba@gmail.com](mailto:ampm.cuba@gmail.com)

#### **PRIMERA LINEA**

**Date:** September

**Scope:** International

**Regularity:** Annual

Theme: A new space for exchange and collaboration between artists, producers and managers, the event's purpose is to position Cuba and the forum as a meeting point for Caribbean sounds. This international music forum features conferences, workshops, jury-selected showcases, a trade fair and dedicated networking opportunities to meet Cuban music operators and artists. Apart from the opening concert, 15 showcases are selected by a Cuban and international jury to present the great variety of Cuban



traditional, jazz, popular dance and contemporary urban music. During the afternoon, there are guided visits to hotspots of music and cultural life and creation in Havana.

**Location:** Gran Teatro de La Habana “Alicia Alonso”

**Sponsor:** WOMEX World Tour

**Contact:** [contact@cuba-primera-linea.com](mailto:contact@cuba-primera-linea.com)

**Convención Internacional de Turismo - FitCuba  
(International Tourism Convention)**

**Date:** May

**Scope:** International

**Regularity:** Yearly

Theme: FITCUBA is the most important event in the Cuban tourism industry. Its main objectives are the promotion and the reinforcement of ‘Destino Cuba’, its destination brand. The 2016 event was dedicated to culture, highlighting the singularity of Cuba’s heritage, visual and musical arts, as well as crafts. Havana was the main location for the event, and the edition highlighted the importance of Canada as a main visitor country in Cuba.

**Location:** Military Complex Morro-Cabaña, La Habana

**Organiser:** Ministry of Tourism

## 2. RECORDED MARKET

### 2.1. Sales

**“There are foreign agreements with overseas companies for physical and digital sales on a mass distribution level. However, no foreign recorded music is sold in Cuba.”**

Cuba has a long history in the recording business. There are only state entities in place, which belong to the Ministry of Culture. EGREM is the primary one, inheritor of RCA and Panart. The label has 50 years of experience and a very rich musical catalog. Its international prestige allowed for an agreement with Sony Music for the exploitation of part of their repertoire. Other Cuban record labels are Bismusic, Colibri and Abdala.

Empresa de Grabaciones y Ediciones Musicales (Music Recording and Publishing Company), or EGREM, is the oldest and most important Cuban record label, founded in 1964 and standing out for heritage, identity and renovation. In 1994, the recording studios, PANART, were built, constituting the first publicly-owned recording studios in Cuba. Companies were nationalised after this, and between 1962 and 1964, the National Printhouse of Cuba (Imprenta Nacional de Cuba) evolved into the creation of EGREM. It is now the largest Cuban company in charge of the production of records, cassettes, CDs and the sale of music supports, provision of cultural services and sales of artistic events both locally and abroad. These activities are based on their own catalog of music in addition to other Cuban music. They also promote the international tours of the artists they manage under Promusic.

EGREM conducts business through the following companies across Cuba:

- **Recording studios in Havana and Santiago de Cuba**
- **The International Commerce Division, headquartered in Havana**
- **Commercial divisions in Havana, Varadero, Holguín and Santiago de Cuba**
- **The Tecmusic division for the sale of musical instrument and accessories**
- **Music Homes (Casas de la Música) in Havana, Cienfuegos, Trinidad and Santiago de Cuba.**

- **Representation Agencies: Musicuba in Havana and Son de Cuba in Santiago de Cuba.**

The commercial divisions are based domestically and constitute entrepreneurial units. These are in charge of product sales (records, cassettes, musical instruments and other products) in addition to promoting profitable musical projects. Turnover is generated by sales in both of the country's currencies to both large retail bodies and small shops. The commercial divisions provide great support, talent hunting and promotion in a territorial basis, also contributing to the increasing regional tourism attractiveness.

The business mission of EGREM consists of:

- **The production, promotion, distribution and sale of phonographic works in Cuba and abroad, as well as the export and distribution of their music catalog**
- **Licensing reproduction rights to foreign companies**
- **Master phonogram licensing**
- **Issuing publications specialising in Cuban music**
- **Local and international artist management**
- **Hosting music shows from Cuban and foreign artists in the circuit of Music Homes (Casas de la Música), along with the provision of hospitality and accommodation services**
- **Preproduction and production in missions, events, and industry gatherings**

Private studios have a high level of activity and are usually run by musicians. These are used for record productions, but they don't offer their services for commercial purposes.

There are foreign agreements with overseas companies for physical and digital sales on a mass distribution level. However, no foreign recorded music is sold in Cuba.

#### **Contacts:**

Colibri: Alejandro Gumá Ruiz (3guma4ruiz@gmail.com)  
Egrem: Marlem Ruiz (rrii@egrem.co.cu)  
Bismusic: Ela Ramos (ela@cubarte.cult.cu)  
Abdala: (Mabel@cubarte.cult.cu)

### 2.2 Retail

There is a national network of music retail shops that belongs to the ARTEX group, part of the Ministry of Culture, but there are no private music retail spaces. These ARTEX stores are easily accessed by tourists, since they are located in city centres and hotels and only sell Cuban records by local musicians.

Promociones Artísticas y Literarias, ARTEX S.A (Artistic and Literary Promotions, ARTEX), founded in 1989, is the main promotion and sales entity for Cuban cultural products and services, accounting for the management of a large part of local artistic creations. ARTEX was the first entity that sold Compact Discs in Cuba. Its record label, Bis Music, was the first in the country to win a Latin Grammy.

Also among its businesses is the Paradiso Agency, the only agency for Cultural Tourism in Cuba that stands as the official representative of cultural events and festivals. The agency facilitates the travel and overnight accommodation for artists and cultural personalities visiting for presentations and cultural exchanges. Their relationship with other cultural institutions and other work by ARTEX allows them to have a product with added value that stands out from the competition. Paradiso has a payment gateway (Mallcubano.com) for fast and safe client transactions. ARTEX organises and sells Cuban cultural experiences and services for tourists and coordinates the production of the country's participation in events, trade fairs and exhibitions internationally.

ARTEX is a pioneer in Cuba's e-commerce through the aforementioned mallcubano.com, an agency for cultural products and services.

It has a commercial network of more than 278 stores and 78 cultural centres throughout the country, with a remarkable presence in the main cities and at tourist attractions. It also conducts import and export tasks, which allows the network to have a large variety of distributed products and services.

ARTEX organises training, workshops and specialised projects and technical consultancy to its clients. They also provide human services for technical assistance in the artistic and literary sector, and their online store mallcubano.com sells Cuban cultural products internationally. In the music and live show sectors, ARTEX delivers:

- Production, sales and distribution of audiovisual works in different formats, such as music CDs and DVDs, media products etc.
- Recording, mixing and mastering of phonographic works
- Reproduction, manufacturing, packaging, distribution, storage, rental, exchange and general commercial exploitation of audiovisual works in all types of support
- Executive production and coproduction of records
- Licensing of masters, publishings and sub-publishings in the phonographic industry
- Legal assessment for copyright and neighbouring rights
- Production and sales of artistic shows
- Administration and representation of artistic groups, with a catalogue of notable popular and recognized artists in Cuba and abroad
- Purchase, distribution and sales of musical instruments and instrument parts, music players, professional audio and light equipment, special effects, stage machinery and other resources for live production.

#### Contact:

Promociones Artísticas y Literarias (ARTEX, S.A.)  
5ta Ave. No. 8010 esquina a 82, Miramar  
Playa, Ciudad de La Habana, Cuba  
Tel. (537) 204 4459 / (537) 204 2741  
Fax: (537) 204 2033  
Email: presidencia@artex.cu  
Web: www.mallcubano.com and www.artexsa.com

### 2.3 Mobile

**“There are over 1 million smartphones in Cuba, a growing number thanks to the policy measures developed by the Ministry of Communications. The use of smartphones to reproduce music is widespread.”**

EGREM has initiated efforts to allow the downloading of musical content through smartphones using their new app, D'Ritmo. The app was specifically developed by EGREM

for the downloading of Cuban music. The service will cost one CUC, which will include downloading an average of 80 songs from all genres of Cuban music. D'Ritmo will also allow users to create custom playlists. It will be accessible before the end of 2016 through the 28 EGREM spaces, as well as through the WIFI points that the Telecommunications Company of Cuba S.A. (Empresa de Telecomunicaciones de Cuba) has enabled.

There are over 1 million smartphones in Cuba, a growing number thanks to the policy measures developed by the Ministry of Communications. The use of smartphones to reproduce music is widespread.

### 2.4 Streaming

Although some audio and video streaming services such as Netflix can be accessed from Cuba, the connectivity restrictions and the bandwidth makes it impossible for Cubans to listen to music online.

Cuba has agreements with foreign companies such as Sony Music, The Orchard and Altafonte, who have made Cuban music available abroad via streaming.

### 2.5 Physical and digital distribution

Physical distribution of music in the country is conducted by ARTEX through their country-wide music retail network. This includes placement in hotels to ensure tourists have access to the work. However, in keeping with the goals of tourism, they only sell music by Cuban artists. Digital distribution is done through Sony Music, The Orchard and Altafonte.

### 2.6 Industry players

ARTEX defines a music business system led by EGREM, which acts as a record label and management company, and the network of institutions in the Cuban Music Institute (Instituto Cubano de la Música), which are the businesses and institutions in each of the country's provinces that represent their local professional musicians. The whole

system aims to manage artists through corporate functions, covering Cuban territory and developing actions abroad.

### 2.7 Trends

Musical trends in Cuba at the moment follow Urban music, Jazz, Salsa and Timba. The industry trend is to keep developing the system in order to satisfy the increasing demand of Cuban music, all while sustaining music creation through artist support.

There has been an increase of Cuban music demand abroad, both in the recorded music market and the live market. More entrepreneurs have visited Cuba with the aim to hire local artists and buy recorded music, and academic services have also been demanded.

The aim is to further develop the Cuban system to face the actual demand of Cuban music and support a sustainable music creation system, generating the resources that the industry needs in order to favour the development of Cuban music creation and support Cuban artists.

### 2.8 Strategies

Cuba's current music strategy aims to improve and update the country's business and institutional system to generate a higher turnover. Institutional efficiency is one of the priorities, along with the encouragement of international ties.

Cuban music is present and actively promoted at international industry gatherings, and the nation is currently working on the promotion of its new industry event, Primera Línea. However, the cultural policy and country strategy does not allow foreign artists to penetrate the Cuban market as of the present time.

## 3. LIVE MARKET

**“Foreign artists do not have the possibility to sell their work or services in Cuba, since there are no financial resources that allow it. The music market in Cuba is comprised of its citizens, with low acquisitive power, and the State, which subsidises culture.”**

Foreign bands that want to perform in Cuba have to submit an application for a local event. After the application is reviewed and approved, they will receive a formal letter of invitation to perform in the country. With this invitation, the foreign act can apply for funding from sponsors in their country of origin. The process is as follows:

1. The applications open for participating in an event.
2. Bands submit their application along with their records and materials.
3. The event’s technical committee revises the information submitted.
4. Bands that have been approved to perform are sent an invitation letter detailing the characteristics of the event. This letter also explains that the event does not cover participation costs and that no artist fee will be provided.
5. Bands that are not able to cover these costs use the invitation letter as proof to apply to public and private sponsors in their own country for financial aid.
6. Once the band secures the funding, they confirm their participation. After this, the full programme of the event is sent to them.

As mentioned before, right now, foreign artists do not have the possibility to sell their work or services in Cuba, since there are no financial resources that allow it. The music market in Cuba is comprised of its citizens, with low acquisitive power, and the State, which subsidises culture. Tourists shopping at local music stores and attending shows also contribute to the industry’s earnings. If a foreign artist were to perform, they would have to be payed through foreign sponsorships, and examples of this are rare.

Cuba has over 10,000 concerts each year, with an estimated audience of 10 million. Jazz, Salsa, Son, Timba, Rap, Rock,

Classical, Trova, Changuí and Rumba are some of the genres programmed live for audiences comprised of both Cuban locals and tourists in all of the 169 municipalities in Cuba. Locals pay between 10 and 30 pesos Cubanos (CUP), while tourists will pay between 3 and 20 CUP for the same show.

**“Cuba has over 10,000 concerts each year, with an estimated audience of 10 million.”**

### 3.1 Promoters

Live music promoters in Cuba are composed of the following agents:

**ARTEX** is an arts conglomerate selling artistic products and services, including the hiring of artists. Music artists are hired through two agencies: Clave Cubana and Musicalia, both with their own roster of artists and both headquartered in Havana.

**Contact:** Migdalia Torres [migdalia@cubarte.cult.cu](mailto:migdalia@cubarte.cult.cu)

**EGREM**, Empresa de Grabaciones y Ediciones Musicales (Music Recording and Publishing Company), or EGREM, is the main record label in Cuba, which also operates 2 artists management agencies: Musicuba and Musicaribe. EGREM has venue spaces for live music in several Cuban provinces.

Cubans enjoy sharing their musical treasures with foreign visitors since music is deeply rooted in their culture. For this, EGREM’s Casas de la Música (Music Homes) host live music shows and integrate shops where it is possible to purchase titles from the label’s music catalog.

Among EGREM’s catalog of services and stores is the lease of recording studios to third parties and the provision of mixing services, mastering services and hospitality and accommodation services as a complement to the artistic presentation in the Casas de la Música. Other products offered by EGREM to assist the dissemination of Cuban music are the sales of records from the label ‘Auténticos’, which are made for rural artists and sold during their live performances. In addition to the records, EGREM coordinates postal and bespoke CDs for individuals and companies.

EGREM stores are located in Havana, Matanzas, Sancti Spiritus, Holguín and Santiago de Cuba.

**Contact:** Marlem Ruiz ([rrii@egrem.co.cu](mailto:rrii@egrem.co.cu))

Instituto Cubano de la Música, ICM (Cuban Music Institute) is the network of music businesses and institutions under the Cuban Music Institute, comprised of 16 entities (one in each province), 3 national companies and 2 centres: the Centro Nacional de Música de Concierto (Concert music) and the Centro Nacional de Música Popular (Popular music). Founded in 1989, the ICM is an institution in the Ministry of Culture in charge of organising, promoting, and protecting the Cuban music movement. Among its main functions are:

**Supporting and encouraging music creation, performance and research**

**Promoting, protecting and enriching the musical heritage of the nation**

**Assisting in the training of a more cultured audience**

**Encouraging the presence of artists and music products in the national and international markets.**

The institutions that comprise the Cuban Music Institute are:

- **National Agency of Artistic Tours - Agencia Nacional de Giras Artísticas**
- **Clave Magazine - Revista Clave**
- **Music Publisher of Cuba, Andante - Editora Musical de Cuba**
- **Industry of Musical Instruments 'Fernando Ortiz' - Industria de Instrumentos Musicales**
- **Strings workshops - Taller de cuerdas**
- **Drums and other specialty workshops - Taller de percusión y otras especialidades**
- **Cuban Agency of Music Copyright - Agencia Cubana de Derecho de Autor Musical (ACDAM)**
- **National Philharmonic of Cuba - Filarmónica Nacional de Cuba**
- **National Centre of Concert Music - Centro Nacional de Música de Concierto**
- **National centre of Popular Music - Centro Nacional de Música Popular**
- **National Museum of Music -**

#### **Museo Nacional de la Música**

- **Information and Documentation Centre 'Odilio Urfé' - Centro de Información y Documentación "Odilio Urfé"**
- **Cuban Music Research and Development Centre - Centro de Investigación y Desarrollo de la Música Cubana (CIDMUC)**
- **Theatre Auditorium Amadeo Roldán - Teatro Auditorium Amadeo Roldán**

Foreign companies interested in business with Cuban music must contact the Cuban Music Institute (Instituto Cubano de la Música):

Contact: Alejandro Gumá, Vice-President  
(3guma4ruiz@icm.cu)

### 3.2 Booking Agents

The booking of Cuban artists is done conjointly with domestic and global businesses working with Cuban music catalogues. These agreements allow Cubans to reach foreign markets, for instance by working with booking agents in Europe, Latin America and the USA.

### 3.3 Festivals

Every year, between 20 and 30 foreign music bands visit Cuba to perform live. The Jazz Plaza festival has hosted many Canadian jazz bands under the conditions required for foreign artists, meaning artists must pay for their travel and do not receive financial compensation.

There are opportunities for Canadian independent artists and companies in the following festivals:

#### **FESTIVAL DE LA TROVA "PEPE SÁNCHEZ"**

(Trova/Ballad festival)

**Date:** March

**Scope:** International

**Theme:** The Trova/Ballad festival focuses on the Trova as a music genre and the preservation of its traditional values and its guidance for contemporary performers. The Trovador Day is also celebrated on 19 March.

**Sponsor:** Cuban Music Institute (Instituto Cubano de la Música. Empresa Comercializadora de la Música y los Espectáculos)

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### 3. LIVE MARKET *Opportunities for Canadian Independent Music Companies in the Cuban Music Market*

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**Location:** Various locations in Santiago de Cuba such as Sala de Concierto Dolores, Casa de la Trova, Salón del Son, Salón de los Grandes and Teatro Heredia

Organising committee: Committee of Leydis Torres Romero.

Tour operator: Paradiso.

**Contact:** (537) (0-22) 641998/ 641867

Email: [cpmusica@cultstgo.cult.cu](mailto:cpmusica@cultstgo.cult.cu)

#### **PREMIO DE MUSICOLOGÍA**

(Musicology awards)

**Date:** March

**Scope:** International

**Regularity:** Biennial

Theme: The so-called 'musicology awards' coordinate the promotion and communication of the latest music creations in symphonic, chamber and choral music across the South American continent.

**Location:** Casa de las Américas, Havana

**Sponsor:** Casa de las Américas

**Organising committee:** José Peláez

**Tour operator:** Paradiso

**Contact:** Mercy Correa

**Phone:** (537) 838 2703

**Fax:** (537) 838 2703

**Email:** [direccionri@casa.cult.cu](mailto:direccionri@casa.cult.cu)

**Web:** [www.casadelasamericas.org](http://www.casadelasamericas.org)

#### **CUBADISCO**

**Date:** May

**Scope:** International

**Theme:** The Cubadisco fair has created spaces for reflection and debate through discussions and symposiums. These are for theorists, creators and music executives, seeking to address different topics on the music industry and encourage exchange, collaboration and knowledge to develop the Cuban music industry in wider and more efficient ways. Activities that take place include music and video presentations, special visits, exhibitions, concerts and the ceremony for the Cubadisco awards.

**Location:** Teatros Nacional, Kart Marx, Sala Avenida, UNEAC

**Sponsor:** Instituto Cubano de la Música

**Organising committee:** Gloria Ochoa de Zabalegui Aguilera

**Tour operator:** Paradiso

**Phone:** (537) 832 8760

**Email:** [cubadisco@icm.cu](mailto:cubadisco@icm.cu), [cubadisco@cubarte.cult.cu](mailto:cubadisco@cubarte.cult.cu),

[gloria@icm.cu](mailto:gloria@icm.cu), [secrevp1@icm.cu](mailto:secrevp1@icm.cu)

**Web:** [www.cubadisco.soycubano.com](http://www.cubadisco.soycubano.com)

#### **FESTIVAL INTERNACIONAL DE COROS "CORHABANA"**

**Date:** July

**Scope:** International

**Regularity:** Biennial

**Theme:** This international choir festival offers the participating choirs the opportunity to perform in the main concert halls of the city, as well as exchange their experiences in the workshops on interpreting and assembling works from the Cuban and international choral repertoire.

**Location:** Teatro Auditórium "Amadeo Roldán" (Sala Caturla), Basilica Menor de San Fco. de Asís, Oratorio de San Felipe Neri, Iglesia de Paula and Centro Hispanoamericano de Cultura, among others.

**Sponsor:** Instituto Cubano de la Música and Centro Nacional de la Música de Concierto.

**Organising committee:** Digna Guerra Ramírez. Directora del Coro Nacional de Cuba.

**Tour operator:** Paradiso

**Contact:** [dguerra@cubarte.cult.cu](mailto:dguerra@cubarte.cult.cu)

or [corhabana2014@amadeo.cult.cu](mailto:corhabana2014@amadeo.cult.cu)

Phone: 836 4942 / 832 4327 / 832 4521 / 832 4522

#### **FESTIVAL DEL SON MATAMOROSON**

**Date:** September

**Scope:** International

**Regularity:** Biennial

**Theme:** The festival pays homage to one of the most representative personalities in Cuban music, Miguel Matamoros. This gathering fosters the development of popular dance music through its Cuban expression in the Son genre. It also includes workshops, master classes and lectures, as well as 'ruedas de casino' (Salsa round dance) and concerts, with exchanges between Son Cubans and the participating foreign acts.

**Location:** Teatro Heredia, Sala de Concierto Dolores and Salón del Son.

**Sponsor:** Empresa Comercializadora de la Música y los

Espectáculos “Miguel Matamoros”, and the Instituto Cubano de la Música.

**Organising committee:** Leydis Torres Romero

**Tour operator:** Paradiso

**Phone:** (53) (22) 64 1998 / 64 1867

**Fax:** (53) (22) 68 7249

**Email:** [cpmusica@cultstgo.cult.cu](mailto:cpmusica@cultstgo.cult.cu)

#### LA PATRIA GRANDE

**Date:** November

**Scope:** International

**Theme:** Translated to mean “The Great Homeland”, this alternative music event in Latin America, with emphasis in Alternative Rock, hosts a programme of open-air shows, as well as gigs in theatres and other venues. A debate space is also available on the topic of alternative music.

**Location:** Teatro Amadeo Roldán, Teatro Nacional, Teatro Mella.

**Sponsor:** Asociación Hermanos Saiz and MINCULT.

**Organising committee:** Luis Morlote Rivas Presidente de la AHS. Pabellón Cuba. Calle 23 e/L y M. Vedado

**Tour operator:** Paradiso

**Phone:** (537) 835 3767 / 835 3768 / 835 3769

**Email:** [morlote@ahs.cu](mailto:morlote@ahs.cu)

**Web:** [www.ahs.cu](http://www.ahs.cu)

#### CONCURSO DE JÓVENES JAZZISTAS JO JAZZ

**Date:** November

**Scope:** National

**Regularity:** Annual

**Theme:** This is a competition for young Jazz players, encouraging the development of a personal style along with the traditional Jazz styles. It also holds an awards ceremony.

**Location:** Teatro Mella, Sala Tito Junco, Café Bertolt Brecht

**Sponsor:** Centro Nacional de Música Popular

**Email:** [direccion@cnmp.cult.cu](mailto:direccion@cnmp.cult.cu) or [nilda@cnmp.cult.cu](mailto:nilda@cnmp.cult.cu)

**Phone:** 203 7667 / 203 0836

#### FESTIVAL INTERNACIONAL JAZZ PLAZA

**Date:** 17-21 December

**Scope:** National

**Regularity:** Annual

**Theme:** Popular Latin and Cuban Jazz artists perform at this event, which also programmes debates around the Jazz genre.

**Location:** Teatro Karl Marx, Nacional, Jardines del Mella, Café Bertolt Brecht, Casa de la Cultura de Plaza.

**Sponsor:** Instituto Cubano de la Música

**Organising committee:** Centro Nacional de Música Popular

**Tour operator:** Paradiso

**Email:** [direccion@cnmp.cult.cu](mailto:direccion@cnmp.cult.cu) or [nilda@cnmp.cult.cu](mailto:nilda@cnmp.cult.cu)

**Phone:** 203 7667

#### Showcases

##### PRIMERA LINEA

**Date:** September

**Scope:** International

**Regularity:** Annual

**Theme:** A new space for exchange and collaboration between artists, producers and managers, the event’s purpose is to position Cuba and the forum as a meeting point for Caribbean sounds. This international music forum features conferences, workshops, jury-selected showcases, a trade fair and dedicated networking opportunities to meet Cuban music operators and artists. Apart from the opening concert, 15 showcases are selected by a Cuban and international jury to present the great variety of Cuban traditional, jazz, popular dance and contemporary urban music. During the afternoon, there are guided visits to hotspots of music and cultural life and creation in Havana.

**Location:** Gran Teatro de La Habana “Alicia Alonso”

**Sponsor:** WOMEX World Tour

**Email:** [contact@cuba-primera-linea.com](mailto:contact@cuba-primera-linea.com)

#### Multi-arts

##### HABANARTE

**Date:** September

**Theme:** Covering arts, cinema, literature, circus, theatre, dance, plastic arts and music, this event aims to strengthen the artistic programme during the month and promote Havana as a cultural tourism destination.



### **3.4 Touring structure**

There are over 100 tours every year developed by Cuban artists, although foreign acts remain in the challenging conditions previously outlined. The most popular music genres touring in Cuba are traditional music, Rumba, Son (Salsa), Timba, Jazz, Clásica, Bolero, Canción, Filing, Electrónica, Rock and Trova.

A Canadian independent band could set up a tour in Cuba if they have their own resources to do so, in coordination with the Cuban Institute of Music (ICM). This tour could be developed in the context of an existing event, but also outside of it. The Cuban institutional network of performing spaces allows it, and there are professional musicians all across Cuba with whom Canadian artists could collaborate.

### **3.5 Fees & Logistics**

A Canadian musician doesn't have the possibility to be presented in Cuba in a commercial manner or through any lucrative activity. Foreign artists presented in Cuba can not earn money independently, and those who do are supported by foreign sponsors that cover the production costs and artist fees.

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## 4. PUBLISHING MARKET INFORMATION

*Opportunities for Canadian Independent Music Companies in the Cuban Music Market*

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# 4. PUBLISHING MARKET INFORMATION

## 4.1 Collection Societies Regime

ACDAM is the collection society in charge of music copyright protection, collection and the distribution of royalties for the use of works domestically and abroad. The mission of the Cuban Agency for Musical Copyright (ACDAM) is to protect the heritage interests of authors, composers, publishers and other owners in the field of music and the performing arts. This is done through the collection and distribution of the copyright generated by the exploitation of works (both domestically and internationally) through reciprocal agreements with over 50 international collection societies, including SOCAN in Canada. ACDAM also manages the Music Creation Programme (Programa de la Creación Musical), which advocates for the protection of Cuban musical heritage.

Among its specific functions are:

- **The administration of music copyright, by signing contracts with exploiters of the musical works, licensing and regulating the legal conditions to allow it**
- **The collection of monies from the use of the musical works, according to the specified tariffs**
- **The monitoring and processing of the information required in regards to the use of the musical works**
- **The distribution of the collected royalties among the members**
- **Overseeing the compliance of the rules for the exploitation of the reciprocal societies' content in Cuban territory**
- **Documenting musical works by request of the authors.**

**“The Cuban collection society is a highly bureaucratic entity. The registration process is difficult, as well as the claims proceedings.”**

The Cuban collection society is a highly bureaucratic entity. The registration process is difficult, as well as the claims proceedings. For the companies interested in licensing Cuban content for commercial purposes, it is worth mentioning that ACDAM provides five different types of licenses: public communication, mechanical reproduction, synchronisation licenses, and one each for the public

communication of dramatic works and of musical dramas.

Licensing a foreign record under ACDAM has to be done through a Cuban record label. Music exploitation licenses would have to be requested by the individual or legal entity using the musical work in a public environment, be it radio, television, audiovisual and phonographic producers, bars, restaurants, nightclubs, hotels or internet content providers. However, the reality of the licensing process is more complex, in order to prevent the unpaid use of music.

ACDAM has a group of representatives in charge of negotiating and closing, in person, the agreements for the exploitation of music in a given territory. Collection of royalties is done through ACDAM's agents, with the tariffs fixed by CENDA (National Copyright Centre). The information about the exploited music is collected from the source, depending on the licensing contract they hold.

For recorded music, the used repertoire is identified with the inventory of the music played, which is submitted by the license holder and checked regularly by an ACDAM agent. Radio and TV stations also submit a list of the music that has been used.

For live music, setlists are submitted to the promoters to be filled in and forwarded to ACDAM on a monthly basis.

For mechanical reproduction, the information on the music inventory is obtained through direct reports from the record labels. These state the figures on the amount of sound recordings produced and distributed physically and digitally.

As for concerns with reciprocal agreements, ACDAM evaluates the possibility of initiating a reciprocal agreement contract when a new collection society joins CISAC. The foreign collection society receives a CISAC-type contract for reciprocal agreement with the global societies, as well as the valid, updated rules and regulations from ACDAM. This foreign collection society can consult the repertoire of ACDAM in Latin-Net in order to manage these files according to their rules and regulations. Here they can look up the musical works that have been assigned or transferred by its members.

Once the suitable conditions for both parts have been revised by the legal department and approved by the general management, the agreement between ACDAM and

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## 4. PUBLISHING MARKET INFORMATION

### *Opportunities for Canadian Independent Music Companies in the Cuban Music Market*

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the foreign agency can be signed.

It is required from the foreign agencies that they provide information on their regulation and operative terms, which have to be the same between ACDAM representatives and their own repertoire.

The International Office also sends an updated status of documentation to allow the collection of all the mentioned rights in the contract. These include other chapters, such as the collection of compensation for non-authorized uses of music, with the intention of protecting the right of public communication and mechanical reproduction of protected works in the contract.

The Documentation Office maintains and updates their databases with ACDAM members information and works. The foreign collection societies are expected to send a list of their deceased members at least yearly.

#### **4.2 Sync Opportunities for English Catalogs**

There are sync opportunities and licensing of foreign music conducted through Cuban record labels and ACDAM. Cuban labels can license foreign artist records and non-Spanish songs. Foreign music to be licensed would have to be reviewed by the label stakeholders in order to secure an agreement.

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## 5. SECONDARY MARKET INFORMATION

*Opportunities for Canadian Independent Music Companies in the Cuban Music Market*

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# 5. SECONDARY MARKET INFORMATION

**“Opportunities for foreign music in Cuba are limited. However, the commercial possibilities of Cuban music abroad are widely available.”**

Opportunities for foreign music in Cuba are limited. However, the commercial possibilities of Cuban music abroad are widely available. In regards to Canada, there is currently a reduced presence of Cuban acts presented at events and festivals, and there is not a Canadian company that specialises in hiring Cuban musical acts.

Canada is the largest tourist country in Cuba, although it is not a culture-based tourism. Opportunities in this sector are available to work on a music-based tourism initiative presenting Cuban bands in different Canadian cities, mainly performing jazz and salsa music. This type of programme could be developed with the Cuban Music Institute (Instituto Cubano de la Música) and a local tourism company.

### 5.1 Gaming

There are currently no opportunities in this field, but they could be implemented in collaboration with EGREM.

### 5.2 Merchandise and brand engagement

Merchandise for musical acts and other artistic creators is overseen by EGREM and ARTEX. This merchandise has export potential. However, the revenue from the export must remain in the country. If a foreign artist is presented in Cuba, it is not common to sell merchandise locally for the economic profit of the foreign act.

### 5.3 Other Players

The main players in the secondary market are the Ministry of Culture (Ministerio de Cultura), ARTEX, ICM, EGREM, BISMUSIC, ABDALA, RTV Comercial, and the Cuban Culture Property Fund (Fondo Cubano de Bienes Culturales).

RTV Comercial is the commercial entity for the products and services of Cuban radio and television, in the sectors of television, radio, live entertainment and the licensing of

Cuban audiovisual works. It also produces and co-produces several TV shows and films. This entity is legally permitted to associate with foreign companies with the aim to develop joint projects, productions and co-productions both in Cuba and abroad. RTV Comercial is also legally permitted to import audiovisual works.

Additionally, the city of Trinidad hosts the Cuban Culture Property Fund (Fondo Cubano de Bienes Culturales), an entity working since 1990 for the production and sale of plastic arts, applied arts and visual arts.

### 5.4 Publishing for recorded music

The promotion and publishing of recorded music is conducted through the local record labels and media. The relevant record labels for this are EGREM, BISMUSIC, ABDALA and COLIBRI.

For instance, there are currently agreements with foreign companies managed through the labels EGREM and Bismusic. These agreements are with Sony Music, My Latin Thing, The Orchard and Altafonte.

## 6. MEDIA AND PR

### 6.1 How the PR market works

Cuba has both local and international media in place. Among local media, the most relevant channels for promotion and information on the cultural life in the country are television, radio, printed press and digital press. All media broadcast foreign and local music, with radio being the media most popular for broadcasting global artists.

Cubavision Internacional, Clave and the tourist TV channel all project Cuban and foreign music videos and are available throughout the country. Music press is mostly comprised of Clave (a music magazine), Cubadebate, El Caiman Barbudo and La Jiribilla. The latter two are generic press, but they include a music review section.

The Ministry of Culture also has a digital platform, Cubarte, which informs on the cultural events and up-to-date info in the country. This platform also provides internet and mail services to local artists, producers and cultural workers.

**“The Ministry of Culture has a digital platform, Cubarte, which provides up to date information on the cultural events in the country. This platform also provides internet and mail services to local artists, producers and cultural workers.”**

#### **Cubarte**

Between 1999-2001, this digital network started as a regional web to connect all Cuban towns and most of their cultural institutions. Today, its main function is to promote the use of new technologies in creation, artistic learning, preservation of heritage and the promotion of Cuban culture and arts.

Cubarte develops IT in the cultural sector through the consolidation of its network, providing news and listings for the general population and those interested in Cuba’s cultural activity. It also promotes the automation of information and management in the sector and the more efficient use of technology in artistic education and creation, as well as the production and sales of cultural products. These products, including the computer products, are sold online to national and international customers. Among its responsibilities are to:

- **Guide, facilitate, promote and control the**

**development and efficient use of IT in the National Culture System, in keeping with the guidelines of the IT Development Programme from the Ministry of Culture**

- **Encourage and facilitate access to the Internet for cultural institutions**
- **Provide e-mail, Intranet, e-communities and forum services, distance learning courses and other tools to encourage cultural development, all through the Cubarte network**
- **Update and manage the online Cuban Culture Portal for the promotion, communication and sale of the products and services generated by institutions under the Ministry of Culture**
- **Design and maintain the Intranet of the cultural institutions**
- **Develop the apps to develop cultural management in the network**
- **Design and produce software, IT products and services for culture**
- **Act as a consultant to institutions from the cultural system, encouraging media production**
- **Promote and sell cultural products and services through e-mail, while developing the online cultural marketplace**
- **Ensure the preservation of national heritage in digital format**
- **Develop search engines to enable easier and wider access to information.**

Its divided areas of cultural work include:

- **Infocubarte, a daily online newspaper focused on the main news in Cuban culture locally and abroad, available in Spanish, English and French. It also has a periodical newsletter.**
- **Webcubarte, which provides web hosting, design, programming and ad support.**
- **Ediciones Cubarte, a publishing brand with a focus on**

### **e-books and CDs.**

- **Redcubarte, which provides web hosting, domain registry, connectivity, instant messaging and technical assistance.**

Cubarte provides basic email services and connectivity, from which 591 institutions, 14 cultural province offices, and 169 municipal offices benefit, as well as 1,000 artists and intellectuals. This service includes messaging locally and abroad, connection to the local Internet (Intranet), and access to the Internet through key cultural locations, such as libraries.

It manages public relations within the institutions representing artists, as well as their management teams. There are opportunities for working in PR using all the available media as well as the artist's own platforms or using available services in Cuba, public or private. Each artist has access to social media, Internet and Intranet, both through the institutions and at their own home.

### **Other institutions**

Public relations are developed through the network of public institutions conformed by the Cuban Association of Social Communicators (ACCS), Publicitur and the Centre for Cultural Development and Communication (Centro de Desarrollo y Comunicación Cultural). Canadian independent artists and companies would work with the Cuban Music Institute (ICM) in conjunction with these institutions for the promotion of Canadian artists performing in the country, since foreign acts not performing in Cuba can not secure promotion.

Asociación Cubana de Comunicadores Sociales (Cuban Association of Social Communicators), or ACCS, organises its members into 'Circles' (Círculos), a working tool to ensure special attention is awarded to the members according to their professional needs and interests. Their work helps develop their particular sectors and acts as a political and strategic lobby for the government. The circles are divided between the Creatives Circle (Círculo de Creativos), the Institutional Communicators Circle (Círculo de Comunicadores Institucionales), the Circle of Researchers in Communication and Marketing (Círculo de Investigadores de la Comunicación y la Mercadotecnia), the Public Relations Circle (Círculo de Relacionistas Públicos), and Publicitur, the tourism PR organism.

The Centro de Desarrollo y Comunicación Cultural (Centre for Cultural Development and Communication), or CREAT, was established with the aim to contribute to the development and social projection of cultural policies. They also work in PR for foreign artists performing on the island. They promote and inform about all the events and activities happening, collaborating with the entire institutional network.

National and local press engage with the communication offices from both the institutional network and CREAT. The Centre regularly receives the information and programming from the Ministry of Culture and the Provincial Cultural Offices, which are then distributed to the media.

**CREART** works in three main areas: cultural promotion, cultural education and cultural research. The Centre has also developed seven of its own means of communication in addition to press, radio, television and the Internet:

**FAXCREART** is a bulletin with the weekly cultural events happening in Havana. It is sent every Friday via email or fax to the cultural, touristic, diplomatic and private companies subscribed.

**Mensajero Cultural** (Cultural Messenger) is a monthly bulletin informing on the cultural programming happening across the country, from events to open calls and anniversaries. It has a private, exclusive circulation among certain companies in the press and news sector, along with student and social organisations.

**Coordenadas** (Coordinates) is a monthly 8-page print publication issued by the Ministry of Culture. It acts as a promotional tool for cultural affairs in institutes, councils and national centres, as well as provides information on a selection of cultural events happening in Cuba. It is delivered to directors, managers and workers of the public cultural institutions, as well as leaders from political and social organisations, writers, artists, and other stakeholders.

**Video Creart** is the production company in the Ministry of Culture, operating since 1983. Its objective is cultural promotion, with a portfolio of a variety of awarded audiovisual productions including documentaries, video art and educational, promotional, advertisement and music videos. This division also coordinates productions

between local and international production companies and the sales of audiovisual products and services. They are responsible for managing and publishing the Cuban audiovisual archive of 100 master videos on local culture recordings.

**Foto Creart** is a division consisting of experienced photographers, a photography lab and the cultural image archive, which contains more than 80,000 images of all artistic manifestations.

**The Stand de Información Cultural** (Cultural Information Booth) was created to inform of products and services from the cultural institutions, while acting as a one-stop-point for enquiries, meetings, interviews and references for Cuban culture in Ministry events.

**'Cuba, un lugar del mundo'** (A place of the world) is a multidisciplinary project in the communication and promotion of Cuban cultural products. Through the creative, educational and research sectors, the project showcases the trends in Cuban culture today in an international tour that has been successfully presented in both Spain and Colombia.

These programmes, created for exchange and collaboration in the musical sector, exist and can be used for Canadian artists volunteering (i.e. unpaid) to perform in the country. Foreign acts presenting their work on the island can use this network of PR and communication services. Cultural information goes beyond the national institutions to the international press, tourism sector and stakeholders.

**Contact:**

Centro de Desarrollo y Comunicación Cultural (CDCC)

Address: Calle 4 No.205 e/ 11 y Línea, Vedado

Phone: (537) 830 9766

Fax: (537) 66-2562

Email: [creart@cubarte.cult.cu](mailto:creart@cubarte.cult.cu)

Web: [www.creart.cult.cu](http://www.creart.cult.cu)

### 6.2 Media and PR opportunities for Canadian

### content

The Cuban media reports on the cultural activity in the country as presented by the local artists, but also the artists' international events and international artists visiting Cuba. The Cuban media and PR could be approached by Canadian independent bands when they are in Cuba for a performance or event. The best point of contact for this is the International Press Centre, details of which are provided below.

### 6.3 Key media and PR contacts

The International Press Centre (Centro de Prensa Internacional) is the main contact.

Address: Calle 23 No. 152, esquina a O, Vedado, Municipio Plaza de la Revolución. Ciudad de La Habana, Cuba. CP: 10400.

Phone: (537) 832 0526 - 28

## **7. VISA SYSTEM, TAX WITHHOLDING POLICY AND OTHER PRACTICAL INFORMATION**

Canadian artists or stakeholders who wish to attend or perform (non-remunerated) at a music or industry event in Cuba can access the country with the standard tourist visa. The visa costs around 210 CAD and is usually provided by tour operators or airlines, with the cost commonly included in the price of the plane ticket or package. In the event of privately organised flights, it can be obtained at the Cuban embassy in Canada. Please note that visitors are prohibited from undertaking business and/or press activities when travelling on a tourist card. Tourist visas are approved for the events Cubadisco, the Choir Festival (Corahabana), and the Jazz Festival.

The participation of a Canadian band in a programmed activity outside an event would require a cultural visa, which is issued in Cuba through the information of the artist. This visa is scanned and sent to the artist in order to be presented to the airline before boarding. The artist would be greeted at the airport by a Cuban representative, and the original, physical copy of the cultural visa is handed to the immigration officials. The visa is then handed back to the artist after their immigration check, so they may carry it during their stay in Cuba.

Upon arrival, visitors must also present proof of health insurance valid for the period of their stay in Cuba. Such proof includes an insurance policy, insurance certificate or a medical assistance card (photocopies are accepted). All health insurance policies are recognized, except those issued by U.S. insurance companies, as U.S. firms cannot provide coverage in Cuba. If you do not have proof of insurance coverage, you may be required to obtain health insurance from a Cuban insurance company upon arrival.



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**Paradiso.** <http://www.paradiso.es/> Insurance from a Cuban insurance company upon arrival.





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Opportunities for Canadian Independent Music Companies in the Mexican Music Market

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## 1. OVERVIEW

**“Mexico is the largest live music market in Latin America and the second-largest recorded music market after Brazil. OCESA and Zignia are two of the world’s largest events companies. The middle class is increasingly investing their money in entertainment”**

Mexico boasts a very powerful music industry. Since the beginning of the 20th century, the country has managed to position itself globally as a market with traditional influences, such as that of bolera, of which Agustín Lara is an internationally-recognized composer. The rise of Mexican cinema in the 50s and 60 also popularized ranchera and Mexican folklore music, which largely explains the domestic consumption that characterizes the country. During the ‘golden age’, there was economic splendor, and the country became one of the biggest producers of music in Latin America. By that time, rock had come to the country, and many artists began to make covers of popular North American songs as well as original compositions written in English. These compositions leaned towards chicano rock, a R&B-influenced rock’n’roll genre played by Mexican-Americans in Southern California, recognisable through its English lyrics sung with typified Mexican linguistic lilt.

During the 70s, younger generations began the search for refuge and identity within Mexican rock, away from the prototypes constructed by the national status quo, which celebrated the charro horseman as the national figure of Mexican identity.

Thus, on September 11-12, 1971, the historic Avandaro Festival was held near the Avandaro Golf Club, 5 km from Valle de Bravo in the State of Mexico. This festival remains the largest rock concert in the country’s history and is even referred to as the Mexican Woodstock due to the controversy it caused. The festival took place in the middle of a countercultural movement called La Onda, characterized by its empathy and closeness to psychedelia. When about 200,000 people attended the festivals, its organizers vetoed the organization of further massive events. The control exercised over international concerts limited their access.

These restrictions on ‘music for young people’ (rock), combined with the fateful protests by and subsequent attacks against students at Tlatelolco and in 1968 and Halconazo in 1971, limited music consumption and led

bands to gather around the so-called ‘funky holes’. These referred to underground spots where a large number of bands concentrated to develop what is today’s Mexican rock scene. Some significant bands leading this movement included Botellita de Jerez, Three souls in my mind (El Tri), La Revolución de Emiliano Zapata and Xavier Bátiz, among others.

As the 80s came to a close, the governmental regime of Carlos Salinas de Gortari launched the National Council for Culture and Arts (Conaculta). This led to the Mexican market opening to international artistic expressions. In January 1991, Gortari gave permission to OCESA, an events company, to bring a concert by rock band INXS to Palacio de los Deportes. This marked the beginning of OCESA’s influence in the Mexican entertainment industry. Today, excepting basic civil protection rules, there are no prohibitions for mass entertainment. Instead, promoters are only asked to ensure the safety of audiences and guests with evacuation plans, parking space, and dedicated permits for ticket sales and the provision of food and drinks.

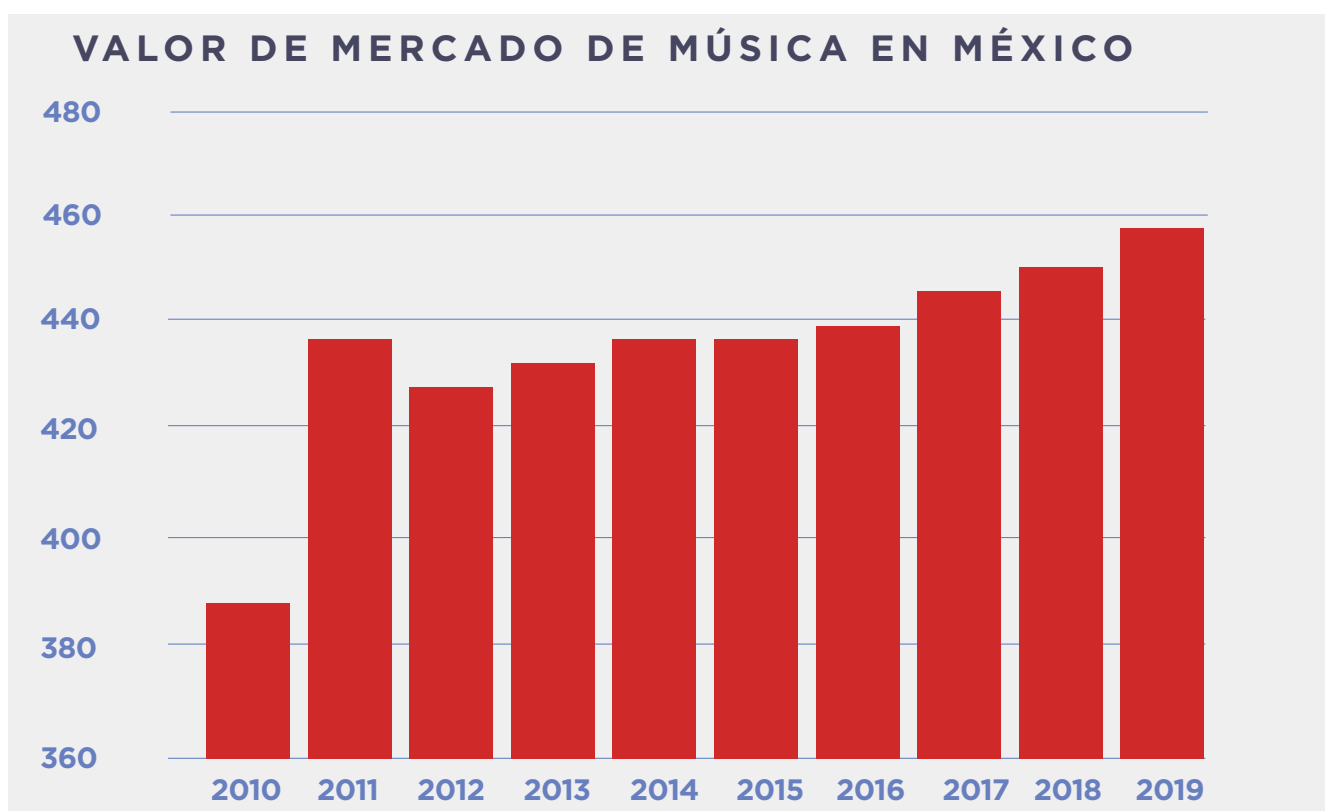
Currently, Mexico is the largest live music market in Latin America and the second-largest recorded music market after Brazil. It is home to two of the world’s largest events companies: the aforementioned OCESA and Zignia, a production company that competes with Livenation. Mexico’s cultural infrastructure is the key to these companies’ success. The middle class is increasingly investing their money in entertainment, according to PWC.

The combination of the strong music industry and the quality of productions creates a fertile environment for Mexico to become one of the most sought-after markets for Latin American artists. PWC expects continued growth to maintain its status as the largest market in the region. Although international artists have great opportunities in this diverse market, the country surpasses others in terms of domestic consumption. Still, Canadian artists are becoming more present on the national scene due to live performances by artists and shows such as Cirque du Soleil, Cavalia, the chamber orchestra La Pietà, Justin Bieber and Arcade Fire.

Mexico is a target market for companies in the Canadian independent music industry because of its large market and its longstanding relationship with Canada. Through their inclusion in the NAFTA (North American Free Trade Agreement) and the import and export of products, Canada

and Mexico have maintained a strong relationship for over a decade. There has also been an increase in the number of retirees living in Mexico and the number of Mexican students living in Canada. Almost 2 million Canadians travel to Mexico every year, and more than 200,000 Mexicans spent their vacations in Canada in 2015.

In the following pages, we examine the Mexican music industry panorama and its relationship and opportunities to Canadian works with the aim of increasing cultural exchange between both countries.



Graph 1: Music's market value in Mexico. In millions of dollars. Source: PWC

### 1.1 Market Size and dynamics

As mentioned before, according to PWC, the Mexican market is expected to grow. The graph above shows revenues of US\$ 450m projected for 2019.

According to the UN's Creative Economy report, Mexico is one of the top creative products exporters in the global market. It is also the only Latin American country included in this list, which exclusively considers twenty countries around the world. The three main export sectors in Mexico are design, publishing and music. Design is the most important sector among creative products, contributing 73% of Mexican sales. It is followed by

publishing (9.8%), music (5.8%), arts and crafts (5.2%), visual media arts (4.6%), new media (1.5%) and audiovisual products (0.3%).

The highest percentage of revenue generated in the music industry comes from the live entertainment industry. The market is controlled by CIE / OCESA and Zignia Live. They not only perform the most important mass events in Mexico, but they control many of the largest-capacity spaces in the country. Additionally, they manage many national and international artists. For example, in September 2016, OCESA brought Radiohead and Roger Waters to Foro Sol (65,000 capacity) for three concerts over two days, all of which sold out.

### 1.2 How to navigate the marketplace

**“In order to navigate the Mexican market, it is important to have an established network before trying to enter.”**

Mexico is an immense country, full of possibilities. Its inhabitants are avid consumers of cultural products, and for many decades they have been the ones who have nourished most of the Latin American consumption. In musical terms, their tastes lean towards national popular artists such as Juli3n 1lvarez, who is comparable to globally-recognized artists like Madonna. In recent years, Mexico has modified its listening habits, and the streaming consumption of music has been raised. As we will detail later, there are different streaming providers in the market. However, Spotify is the largest streaming company in Mexico. That is why the lists that the company publishes every month offer a broad description of consumption and the contents of Mexican charts. According to Spotify’s lists in 2015, the three most-streamed artists were:

1. Juli3n 1lvarez
2. Enrique Iglesias
3. Calvin Harris

Mexican regional music, or banda, is the most listened-to genre on both digital and radio platforms. Juli3n 1lvarez is currently one of the most important artists of Mexican regional music, and in 2015 he closed the year with two sold-out dates at Mexico City’s National Auditorium, playing to a crowd of 10,000 people.

According to Spotify’s data, musical genres are segmented depending on age and the region. The data depicts that men between the ages of 15 and 24 prefer domestic hip-hop and regional Mexican music, while women of the same age are more likely to listen to mainstream, international pop such as One Direction and Bruno Mars. These listening habits have solidified pop and regional Mexican music as the leading genres in the music industry.

Many great Mexican promoters have taken advantage of this trend by maintaining a strong presence in the country’s most important cities, such as Mexico City, Monterrey and Guadalajara. Ocesa and Zignia Live organize a good portion of the pop and regional Mexican shows that take place in these cities, many of them organized with local institutional supports.

Other large international production companies have entered the most tourist-heavy areas, such as the Rivera Maya or the Rivera de Nayarit on both coasts of Mexico. This has diversified the market and expanded the range of competitors. There is an increasing amount of large beach festivals conducted with the support of international independent companies, especially in electronic music.

One would not speak of a single independent Mexican scene, but rather scenes. Every region consumes different content. Mexico City, Guadalajara and Monterrey have catalyzed much of the development of the local independent scene and have been segmenting. For example, Nuevo Le3n has been specializing in the urban music scene, where important hip-hop and rap artists, such as Cartel de Santa and Gera MCM, have emerged. On the other hand, Jalisco and the western region has been specializing in indie rock, pop and folk and has been positioning important independent artists such as Caloncho, Siddhartha and Porter. As Mexico City offers a much wider market for the independent artists, all of these genres can already be found in the area.

In order to navigate the Mexican market, it is important to have an established network before trying to enter. It is also important to have reliable sources of information about the scene, its possibilities and the reliability of who you are working with. The independent scene is still in an emerging stage and is seeking to position itself outside of big production companies. For this reason, there is still a lot of informality in the sector, which can lead to a lack of professionalism in terms of deals and compliances. There is also a lack of established and trustworthy information on the independent Mexican scene, and therefore visions are often biased.

Mexican independent scenes are looking for alliances for cultural exchange. Organizations from other countries, such as French Alliance, Spanish Cultural Center or Goethe Institute, have been good sponsors for many of the activities. For example, Spain has been a key ally in conducting the trade conference Nodo.

However, Mexico is deeply rooted in family values. Friendship is an important base for business, and Mexicans prefer to establish trustworthy relationships before doing business or collaborating with someone.

### 1.3 Trade conferences and industry gatherings

In Mexico, there are few business conferences and industry gatherings focused on music, when compared to other countries (Colombia, for example, has triple the amount). However, some events for professionals are presented, seeking to consolidate networks and platforms for the circulation and dissemination of musical work, not only nationally but globally.

One of the biggest and most traditional of these is sound:check Xpo. It has been operating for 15 years, receiving up to 20,000 people each March at the World Trade Center in Mexico City. This event has established itself as a strategic place for business generation and professional training. Oriented to technical issues, it is where sound, recording, lighting and video design professionals, stages and installations experts, production staff, promoters, producers and musicians meet. The meeting has exhibition halls for the presentation of new products and there are didactic concerts, an educational day and masterclasses with artists such as Billy Martin, Rita Guerrero and Gonzalo Rubalcaba.

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Another conference oriented to creators and managers is the FIMPRO (International Music Fair). Launched in 2012, it takes place in the city of Guadalajara, Jalisco, the western area of the country. In 2014, FIMPRO reconfigured its format to organize business conferences and meetings with important players in the local, national and international music industries. This format allows for the collection and distribution of important information on the state of the independent music industry, especially that in Guadalajara itself. The amount of independent musicians who have found opportunities across Mexico's regions can be largely attributed to the reach of FIMPRO as a point of convergence for the music industry. The latest edition saw over 900 professionals attend, primarily representatives of the independent industry.

The genres represented in FIMPRO are varied, but there is a great amount of indie-rock, jazz, fusion, alternative rock and pop. Showcases stand out for their high quality performances featuring bands from North America and Latin America, such as La Santa Cecilia (an American band with Mexican members), Caloncho (Mexico), Tulipa Ruiz

(Brazil), Mateo Kingman (Ecuador), Diamante Eléctrico (Colombia) and Vanessa Zamora (Mexico), among others.

The May 2018 edition will introduce yet another format for FIMPRO, operating as a UDG Culture project, the area of the University of Guadalajara dedicated to the promotion and dissemination of culture.

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Another important independent scene conference is Nodo, which takes place in Mexico City in the setting of Festival Nrmal. It works closely with the Spanish Cultural Center, Factoría 360° and Sound Diplomacy. The event provides networking spaces to interact with other participants from Latin America and the rest of the world, and it is considered very important for music industry players in the city, as it connects them to representatives of public and private institutions in music management. There are dialogue panels, conferences, networking areas with speed meetings and pechakucha nights. Its last edition boasted approximately 1,000 participants and representatives from seven Mexican music festivals and twelve international music festivals.

One of its major contributions to the Mexican music industry is the database that has been created and can be consulted for free at <http://nodo.festivalnrmal.net/nodos/>. Furthermore, Nodo continues the conversations that took place through meetings with local assemblies. This aims to strengthen the affinities among participants and identify areas of opportunity in the independent music circuit. These assemblies are dedicated to representatives in Mexico City, but they are open to anyone who wishes to participate.

If you want to get to know the independent sector, Node is one of the key meetings. Although, in professional terms, it is not yet established because it is so new, the unique and risky musical proposal has attracted great promoters who have established it as a business meeting.

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In Mexico City, there is also Convención Monitor, which is organized by Monitor Latino, a company dedicated to radio monitoring, music and entertainment. Slowly, their activity has evolved and in addition to organizing the meeting, they provide services developing communication strategies for



artists such as Juan Luis Guerra, La Original Banda El Limón, Lady Gaga, Julián Alvarez and Alejandro Sanz, among others.

The Convención Monitor LATINO (CML) was held for the ninth time in October 2016 with a mission to foster interaction between 5,000 people. The most important Latin American promoters and artists attend the event, which is oriented to pop, reggaeton, tropipop and regional Mexican music. The next edition will feature a talk by Daddy Yankee as well as J Balvin, Maluma and Armando Manzanero.

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Although there are very few trade conferences and business meetings in Mexico, they are ideal spaces for the Canadian music industry to begin expanding horizons of work and, above all, meet people with whom they can coordinate professional partnerships. Each of the spaces serves to position and launch bands in different latitudes as well as serve any music-related businesses from publishers to record labels and global distribution offices.

Trends in the music industry around the world have allowed music markets to proliferate, so consolidating independent music in Canada can be a very achievable short-term vision. However, the Mexican market tends to be quite aggressive, and the independent market has many ups and downs. Companies offering music industry-related products and services are increasing, which is why competition is becoming high and better-organized. Mexico is already starting to receive many franchised editions of festivals and concerts.

## 2. RECORDED MUSIC INDUSTRY

### “The Mexican market offers very good opportunities for international artists.”

The recorded music market in Mexico increased revenue by 14.4% from 2014 to 2015. During this time, physical sales revenue fell 4.7%, from US\$ 44.9m to 42.8m. Physical now accounts for 33.8% of recorded music revenue and digital sales account for 59.8%. PWC predicts that physical format will continue to decline dramatically and, from 2015 to 2016, will drop from US\$ 27m.

### 2.1 Sales

Music sales in Mexico are one of the highest of the international music industry and present an 80/20 balance, where most of the revenues go to the most popular artists. For example, Juan Gabriel’s 2015 album, *Los duos*, obtained gold, diamond and three platinum certifications (two times platinum within three days of release). During 2016, certifications given by AMPROFON went to Vicente Fernández, Gloria Trevi, Enrique Iglesias, Selena Gomez and J Balvin, among others.

It is important to mention that validated record sale numbers for gold albums have varied so much because of

Country	Certifying body	Gold	Platinum	Diamond
Canada	CRIA	40,000	80,000	800,000
EUA	RIAA	500,000	1,000,000	10,000,000
Mexico	AMPROFON	30,000	60,000	300,000
Brazil	ABPD	20,000	40,000	160,000
Colombia	ASINCOL	10,000	20,000	200,000
Argentina	CAPIF	20,000	40,000	250,000
Chile	FIIF	5,000	10,000	10,000

Table 1: Thresholds of certification for albums

internet piracy and the black market. The following table is a comparison of figures between some countries in Latin America and North America. Two independent artists who were also certified in 2016 were Caloncho (30,000 albums sold) and Mon Laferte. Both of them work with small independent companies: Discos Valiente and Bubbler Sounds, respectively. However, both are also affiliated with Universal Music.

The Mexican market offers very good opportunities for international artists. Motion, by Calvin Harris, sold 30,000 copies, which, in terms of record sales, is comparable to national artists such as Juli3n 3lvarez and Vicente Fern3ndez. Also, music for younger demographics like

Sasha, Benny and Erik and CD9 received gold records earlier this year. Disclosure is a band that has been successful both in terms of record sales and live shows. In March 2016, they received gold certification for *Caracal* and in April, they filled Mexico City’s National Auditorium with 10,000 fans. It’s also worth noting that, in 2015, they recorded the video for their hit single “Holding” at the Monument of the Revolution.

There is no strong government or direct support for international bands. As explained by Universal Music Mexico’s Anglo marketing director in El Universal: “If we analyze the resources we have to support international rock music, there are very few. Although new young artists have been pushing and improving the scene internationally, in

terms of music sales, we can not compare it with popular domestic artists, which reach a higher percentage of the population”.

**“Festivals and gatherings are increasingly open to daring and abstract sound proposals each year.”**

Both the local and international independent scenes are growing stronger, and according to Forbes, represent about the 35% of the music market. Festivals and gatherings are increasingly open to daring and abstract sound proposals

each year. This usually stays in a niche market, which is why it is very important to understand which are the regions for developing musical product in the market and which are the right partners.

In Mexico, international companies such Sony, Warner and Universal attract a big part of the market producing content that can be sold relatively quickly. However, Mexico has an alarming rate of pirate album sales. That means that out of every 10 CDs sold on Mexican streets (shops, stores or traffic lights), 7 are pirated and are distributed clandestinely. This is

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not a good scenario for record labels and sales. Since 2000, many small labels have been established and have built a new path for national and international artists.

**2.2 Retail**

Despite their low income, there are several store chains still selling CDs and DVDs. Mix-up has 27 warehouses located in the metropolitan area of Mexico City, 37 warehouses in the Republic’s interior and a warehouse in El Salvador. They not only distribute albums but also sell electrical appliances,

books, accessories and toys. The prices of CDs and DVDs range from \$100 to \$500 pesos (between 6 and 32 CAD).

Gandhi Bookstore is a classic in the country, operating for 40 years. In addition to having stores in Liverpool and Palacio de Hierro, as well as other shopping malls and airports in the country, it currently has over 32 stores in the Republic. This bookstore also sells other products, such as records and DVDs, and is even an authorized retailer of Ticketmaster tickets. They also made an agreement with Ocesa that allows promoters to place posters of their concerts within the store and include advertising in the database of the bookstore clients. In return, Gandhi gets a

certain number of concert tickets to raffle or give away to their buyers.

Web: [www.gandhi.com.mx](http://www.gandhi.com.mx)

Sanborns is a popular shopping mall in Mexico. There are 149 shops in the country, more than half of which are in Mexico City. CDs and DVDs sold in Sanborns range between 74 and 300 pesos, or 4 to 20 CAD. Almost all of their products are of Mexican regional music and other national pop hits, and they distribute the works of Sony Music and Universal. Sanborns is now part of Carlos Slim's Carso Group and has been traded on the stock exchange since 2013.

Web: [www.sanborns.com.mx](http://www.sanborns.com.mx)

Mr.CD was born in Guadalajara two decades ago. It began selling CDs and evolved to general entertainment (movies, video games and musical instruments). They also organize social and business events and events for children. Since the city had a wanting supply of international music, when they first opened up, their main specialty was the sale of imported products. In addition to their online sales platform, they have several branches located in the main plazas of Guadalajara's metropolitan area. In 2015, they expanded their business into professional audio sales, securing a distribution deal with Fender and Yamaha. Mr.CD also offers advice, equipment maintenance, product guarantee (including a five days return policy if dissatisfied) and ease of payment.

Web: <https://mrcd.com.mx/>

Most independent labels have chosen to distribute online, especially through Kichink! and, to a lesser extent, through other international platforms, such as Bandcamp and Discogs. However, the distribution channels of records, DVDs and vinyl depend a lot on music genre.

Web: [www.kichink.com](http://www.kichink.com)

Web: [www.bandcamp.com](http://www.bandcamp.com)

Web: [www.discogs.com](http://www.discogs.com)

There are some local platforms such as Suplex, which was created by the independent label Abolipop and is dedicated exclusively to electronic music. Created in 2009, it was one of the first platforms in Mexico that distributed music for free. They are focused on MP3 distribution, but they also have luxury and collection editions, cassettes, vinyl, books and videos.

Web: [www.suplex.mx](http://www.suplex.mx)

Recently, LPs have made a nostalgic comeback, and some record stores have come aboard. Mexico City already has some well-known music stores selling the format, one of them an online store called La Revancha. Its selection is curated by specialists, oriented towards jazz, reggae, rock, hip-hop, soul, funk and salsa (Run The Jewels, Dusty Springfield, etc). In addition to vinyl, they sell books, cassettes, t-shirts and magazines. Its webpage also has editorial content: reviews, essays and recommendations.

Roma Records is a mythical collectors store strategically located at Avenida Álvaro Obregón in Mexico City. There, you can find music from Spiritualized, Apparat and Air to The Strokes, Arcade Fire and Bob Marley's classics. They also distribute the catalogues of national labels such as Arts & Crafts. Twice a year, they celebrate Record Store Day, where they present one special-release vinyl album for sale. They also organize books signings, record presentations and showcases. They participate in Corredor Cultural Condesa, which is an initiative of the citizens to promote cultural activities in the Condesa and Roma regions of Mexico City.

Web: [www.laromarecords.com](http://www.laromarecords.com)

Another vinyl store in the city is Discos Mono, which has an impressive collection of rare and cult music. This record store also supports independent labels, does occasional DJ set events and showcases new bands. Discoteca also distributes records, books, design items and international magazines and each month has an average of 40 new titles. They have catalog of most independent Mexican record labels.

Web: [www.discosmono.mx](http://www.discosmono.mx)

Web: <http://discotecaonline.net/>

Submarino Amarillo is one of the record stores that offers collectible CDs in Guadalajara. The store presents an interesting case, as it began in one of the city's most popular open-air markets and now has more than 30,000 titles in its inventory. They sell original records priced from 500 to 10,000 pesos, or 32 to 64 CAD.

Web: <http://submarinoamarillocds.com/>

Roxy and Roll is located at the corner of Calle Mezquitán and Juan Manuel, a few meters from the old Roxy cinema in Guadalajara. It is another music sales icon in the city. This store, which turned 35 years old in November 2015, provides music from a wide range of genres such as rock, blues, jazz, progressive, metal, punk, rancheras, trios, boleros, tangos

and cumbias. Its case is very similar to that of Submarino Amarillo: they demonstrate that the music trade can hold up with the added value that old CDs and vinyl editions have.

In Guadalajara, vinyl fever has arrived to stay. Since 2015, Vynilmania Fest has taken place at Laboratorio de Artes y Variedades. It consists of a meeting for vinyl lovers to sell and exchange material. It is not genre-specific, and you can find treasures for almost all tastes.

### 2.3 Mobile

All industries are being affected by changes in trends and consumption thanks to new technologies. Mobile use is constantly growing, and although this presents great challenges each day, it also brings many opportunities. There was a 41% increase in mobile musical revenue in 2014, which was capitalized by streaming and digital downloads. This marked 2013 as a key year to build the foundations of a more solid and profitable industry. Music has become the engine for innovation development, with musical applications the second-fast growing category among mobile devices.

Claro Musica is a music service operating in Mexico since 2014. It replaced ideasmusik, which was mobile service provider Telcel's music service. Claro Music has a wide catalogue of à la carte music. It allows you to create radio stations based on artists, genres, and so on, as well as download music to listen to it offline afterwards. There is also an in-house team which curates a daily playlist. The service, which boasts a catalogue of over 25 million songs, is available on the web, Android and iOS platforms.

The interesting thing about Claro Musica is its payment possibilities. Customers can pay through a subscription service that charges the payment directly to their Telcel or Telmex receipts, they can use their Claromúsica card or they can pay by credit card, as with other platforms.

### 2.3 Streaming

**“The impact of streaming in Mexico is not new. It has been leading the list of digital platforms in Latin America, surpassing figures in Brazil, Argentina and Chile for several years.”**

According to the latest study by IFPI, considering both premium and free subscriptions, streaming in Mexico represented 83.23% of revenue, worth US\$ 48.44m. This is a 240% increase from the previous year. However, Comscore figures show that, in 2012, 35% of Internet users were accessing unlicensed, illegal music services. By 2015, that percentage fell to 23%, below the world average. This shows streaming services such as Spotify, Deezer and Claro Música, among others, are preferred by users.

The impact of streaming in Mexico is not new. It has been leading the list of digital platforms in Latin America, surpassing figures in Brazil, Argentina and Chile for several years. The market is led by Spotify, which scores well above its competitors.



**Spotify: 64.1%**  
**Google Play: 12.3%**  
**Apple Music: 8.1%**  
**Claro Musica: 7.5%**  
**Tidal: 2.1%**  
**Deezer: 1.8%**

*Figure 4: Percentage of the market of streaming platforms. Source: IFPI 2015.*

According to the report of Audio Ad and Oh! Panel, Latin American radio listeners only listen to internet radios slightly over four hours per week. Although Deezer has agreements with 40 operators allowing them to offer services in 180 countries, it is ranked last in Mexico. In Colombia the platform works in partnership with Millicom; in Brazil, with TIM; and in Mexico, with Totalplay, but they still are not a market success.

In 2015, when Deezer abandoned the idea of going public, they announced that their customers get an automatic subscription as a result of their contract with the telecommunications operator, but customers still don't use their service. Deezer has 6.34 million registered subscribers, and 3.34 million of these are not active, despite having it automatically included with their data plan. They only have 1.54 million direct subscribers using the platform without a mobile plan.

The popularity that Spotify has achieved in the market also reflects the behavior of users. Their weekly lists reflect the worldwide status of the national industry and listening trends.

Best-selling acts in the Mexican market are domestic artists such as la Arrolladora Banda El Limón and La Banda Sinaloense MS. These rank on the top of the most listened-to and downloaded song charts, leaving international artists on the lower end of the charts.

PWC's report reveals that, by 2020, the streaming market in Mexico will have a value of US\$ 128m. However, stopping users from consuming free music is becoming difficult, just as it is difficult to secure premium-paying subscribers or new paying customers. Less than a third of Spotify's 100 million active users are registered with monthly subscriptions, and although Spotify is generating more income, it is also increasingly investing more money.

Mexico ranks third globally on YouTube video consumption. Consumers are primarily 'millennials', between 18 and 34 years old. Between April 1, 2014 and March 30, 2015, video consumption in this format grew 68%, registering 4,000 million views and 10,174 total minutes consumed per month. This represents an opportunity for foreign companies, since only 4% of the content generated within Mexico is video content.

These were the 10 most-viewed videos in July 2016:

1. **Pulcino Pío - El Pollito Pío**
2. **Romeo Santos - Propuesta indecente**
3. **Banda MS - Hermosa experiencia**
4. **Banda Tierra Sagrada - La buena y la mala (el dilema)**
5. **Julián Álvarez y su Norteño Banda - Te hubieras ido antes**
6. **Prince Royce - Darte un beso**
7. **Enrique Iglesias - Bailando ft Descemer Bueno, Gente De Zona**
8. **Banda MS - No me pidas perdón**
9. **Banda Sinaloense MS de Sergio Lizárraga -**

### **Mi razón de ser**

#### **10. Banda Los Recoditos - Mi último deseo**

As we can observe, national acts are the most listened-to.

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### **2.4 Physical and Digital Distribution**

**“There was a 41% increase in mobile musical revenue in 2014, mainly through streaming and digital downloads.”**

There is no general data on the preferences of Mexican artists towards a certain platform or company to distribute their music. However, there are very few artists who have not migrated to digital, and most of them are representatives of traditional music and Mexican folk music.

According to data provided by the intranet of the music festival FIMPRO, out of their 804 Latin American bands, 68% distribute their music digitally, while 32% do not. This proportion is almost identical when narrowed down to Mexico. Of the 416 Mexican bands in the platform, primarily from Mexico City and Guadalajara, 66% distribute their

music digitally. The main digital distribution companies that Mexican artists work with are CD Baby (119 bands), followed by TuneCore (81). Believe Digital (31) and Casete (22) are less popular among FIMPRO's sample of bands.

The only Mexican company on this list is **Casete** which, in addition to distributing music digitally and physically, also works with films. They work as publishers and are specialists in music supervision and audio synchronization for movies, television, commercials and video games.

There is a local company called **1978 Music Co**, designed for artists, bands and independent labels that want to reach a wider audience with their music. Each artist creates their own profile and pays a subscription ranging from US\$ 5 to 36 to distribute in over 50 music stores such as Spotify, iTunes, Virgin, Last FM, Shazam, Beatport and Amazon MP3.

There is also **Prodisc**, which is dedicated to both physical and digital distribution. Whether it's a full-length album at HMV, an EP on Spotify, a song included in a YouTube user-generated video or a Telefonica ringtone, Prodisc has worldwide reach. They work with over 80 platforms, including the main digital stores such as iTunes, Amazon, Youtube, Facebook, Spotify, Google Play, Deezer, E-Music, Telefónica etc. They implement specialized digital distribution strategies, thereby optimizing reach. Prodisc also has physical distribution in stores such as Mixup, Sanborns, Liverpool, Sears, Best Buy and Palacio de Hierro, among others. They also offer manufacturing services.

**Prodisc** is focused primarily on national rock and has published several compilations from some great festivals such as Vive Latino. Although they have worked with Of Montreal and The Cranberries, they work with few international bands.

**ONErpm**, the digital distributor created in 2010, arrived in Mexico in 2015, when the platform was a one-of-a-kind market leader in Brazil. Although ONErpm (Revolution People's Music) works with Spotify, YouTube, Deezer, Apple Music, iTunes and Claro Música, it is not as popular in Mexico as it is in Brazil or Colombia. Currently, ONErpm works with La Original Banda El Limón, Hello Seahorse!, Los Románticos de Zacatecas, PeeWee, Vázquez Sounds, Roberto Junior y su Bandeño, Alejandro Filio and Adán Cruz, among many other independent artists. The company decided to offer free distribution in order to grow within the global music

market while helping artists.

**Fonarte Latino** is one of the most important distributors. They launched in 1983 with the purpose of concentrating on alternative producers. Fonarte Latino has had one of the most important distribution catalogs of Latin American music, from Spanish folklore to rock to Trova and various genres such as nueva canción. They work with artists such as Fernando Delgadillo, Mexicanto, Pablo Milanés, Silvio Rodríguez, Jaramar, Los Tres Tristes Tigres, La Casta and Virulo, among many others.

### 2.5 Independent Record Industry

As we have seen, there are three international companies that attract a large part of the market: Sony, Warner and Universal. As the live music industry is led by powerful companies such as OCESA and Zignia, the recorded music market reflects something similar with these major labels.

Although there are interesting companies in the north of the country, such as in Monterrey and Tijuana, Mexico City has the majority of independent labels. Guadalajara, Morelia and San Luis Potosí have an emerging but more modest scene. Some of the most important players within the Mexican independent scene are as follows.

**Casete** is more than a record label, providing all services for artists from selling and promoting to placing and distributing musical and film content. That is to say, they are responsible for both physical and digital distribution, marketing, synchronization opportunities and musical supervision, as well as online and offline promotion. Headquartered in Mexico City, its system is one of the most optimal and sought-after by artists today, since it represents an investment in national distribution. Not only do they work with Mexican artists, but within their catalog, there is international talent such as Bon Iver and Preoccupations. Their most famous artists are the newly-signed Quiero Club, Instituto Mejicano del Sonido and Ana Tijoux, among others. They also work with artists to create soundtracks adapted to unique projects and boast Julieta Venegas, Sebastian Escofet, Centavrvs and Matías Aguayo among its allies.

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**Discos Intolerancia** is already one of the classic players in the independent Mexican scene. What began as a record label 20 years ago now seeks to work for the long-term careers of musicians in Mexico. For three years, they have directed a stage (Carpa Intolerante) in Vive Latino, which is the most important ticketed rock festival in Latin America. They also held a showcase at the SXSW festival in Austin, Texas. The company's catalog has more than 300 active artists from all across Latin America. Intolerancia not only produces and distributes records, but also provides support and promotion to develop the artistic skills of each band. The label recently launched their subsidiary label, Intolerancia Records Costa Rica, in partnership with Luis Arias (Flevent) to open new doors for musicians from Costa Rica. Their aim is to build a bridge that allows the circulation of bands between Mexico, Costa Rica and Colombia. They are also working with OCESA and FIMPRO to create Circuito Vive, a project that will begin in 2017. The project aims to generate touring circuits no more than an hour away by bus where artists, whether national or international, can play 13 dates in different venues, finishing at the Carpa Intolerante stage.

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**Terrícolas Imbéciles** started as a record label, but today it is also dedicated to talent development. It was founded in 2007 by Juan de Dios Balbi, a representative of Café Tacvba, Emmanuel del Real (who is a member of Los Tacvbos) and Josué Orduña. This record label was born to support Latino artists in Mexico, but also aimed to bring new music to the country. Currently, they have a roster of almost 60 bands from Mexico, greater Latin America, US and Europe that ranges from Yokozuna to The National, through Bomba Estéreo. They also represent many Anglo-oriented bands such as Atoms for Peace, Dead Can Dance, Faith No More, FKA Twigs, The Horrors, Primal Scream and Japandroids. This last Canadian duet has been quite successful working with Terrícola Imbéciles, and Mexico City was the only Latin American city included in their next tour, which will visit Canada, USA and the UK. Terrícolas Imbéciles recently launched a campaign (EIFísicoSÍlmporta), an initiative which seeks to give the physical format the value it deserves.

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**La Chupiteria Records** was developed as a partner of iconic Guadalaajaran electronic bar "La Chupitería. The most

important national DJs play sets there, and it slowly became a promoter of electronic music in Mexico, working with numerous foreign artists.

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**Arts & Crafts México** holds their main headquarters in Canada. In 2008, they joined forces with Chikita Violenta, and so the company opened their offices in Mexico. Since then, the record label has been releasing records in Mexico from bands such as Beach House, Alabama Shakes, Beirut, No Age, Pavement and Jay Retard, artists who otherwise would never have reached the country. Moreover, the label has signed Mexican bands such as Torreblanca, Los Odio and Bam Bam, which makes the label a reference for independent music in the country. As they are partners of the Canadian record company, they work with many Canadian artists, such as Dan Megan, Metric, Kevin Drew, Amy Millan, Apostle of Hustle and Calvin Love, among others.

**Contact:** Armando David Ortigosa Kurián, Co-founder of Mexican division ([armando@arts-crafts.com.ms](mailto:armando@arts-crafts.com.ms), [armando@kontrabando.com.mx](mailto:armando@kontrabando.com.mx) or [viridiana@kontrabando.com.mx](mailto:viridiana@kontrabando.com.mx))

**Abolipop Records** began twelve years ago in the experimental and electronic scene. This Guadalajaran label, which is into new sounds such as indietronic, synth punk, melodic pop, noise and abstract sounds, is also interested in different formats for music, launching both physical and digital releases. Abolipop is a modest but strong player in electronic music in Mexico, and they have released albums by artists such as Nebula 3, Lumen Lab, Yair López, Israel Martínez and Fernando Viguera, among others. Both the releases and the artists have traveled the world, representing experimental Mexican music in the United States, Europe and South America. Abolipop Records was one of the first Mexican labels that grasped onto the idea of distributing music for free. From the beginning, they have released music on a digital format, but it was in 2009 when they launched their alternative project, Suplex, a webpage where free albums are shared. To date, more than 30 recordings have been uploaded.

**Contact:** Israel Martínez, Co-founder ([israelmartinez79@gmail.com](mailto:israelmartinez79@gmail.com))

**Finesse Records** is a Monterrey-based netlabel founded in 2012 by the musician Teen Flirt. They specialize in electronic music, working with Mexican artists such as BCOTB (Black Cats On The Bag) and Adrian Be da vida. As they have presence from Chile to Japan, this record label has set a



great example of how electronic music can cross borders. The label advocates consistency, with the artwork of each record portraying the same avant-garde touch and the production of the videos left to the charge of the same producers. Their latest releases include Mount Bank from UK, AllGlass from New York and Iluiin from Japan.

**Contact:** Lalo Rojas, booking ([lalo@caballeros.tv](mailto:lalo@caballeros.tv))

Over the years, Noiselab has positioned itself as one of the most iconic record labels in independent music in Mexico. Artists such as Zoé, Chikita Violenta and Los Dynamite have been part of their catalogue, and they have also released Interpol, Arcade Fire and Morrissey albums in Mexico. Furthermore, they have an event production agency and a website with fashion, music and design content.

**Contact:** Héctor Mijangos, General Director ([mijangos@noiselab.com](mailto:mijangos@noiselab.com))

**N.A.A.F.I** works with artists from the north of the country, such as Siete Catorce, Mock the Zuma or Mexican Jihad. N.A.A.F.I releases music that is a mixture between tribal and electronic music, very similar to L.A.'s record label Fade to Mind, who they in fact work with on occasion, hosting events and parties.

**Contact:** Tomás Davó "Fausto Bahía", Co-founder ([info@naafi.mx](mailto:info@naafi.mx))

**Umor Rex** has artists from different genres and countries, but they release mostly electronic music. They stand out for their flawlessly designed releases and packaging, limited edition vinyl, CDs and cassettes. Their products are all manufactured in the United States and Europe. They work with artists such as Driftmachine, M. Geddes Gengras, The Human Elephant and Charlatan.

**Contact:** [info@umor-rex.org](mailto:info@umor-rex.org)

**Abstrakt Muzak** was born in London, established in Texas and developed in Mexico. This label is 100% Mexican, and its efforts are focused on promoting underground talent. For example, the Mexican band Los Mundos, who are signed by Abstrakt, performed at Levitation 2015 (formerly known as Austin Psych Fest) after promotional and development efforts by the label. Abstrakt prefers distortions, shoegaze, obscure sounds and even experimental electronics.

**Contact:** [hello@abstraktmuzak.com](mailto:hello@abstraktmuzak.com)

**Maligna** also champions itself as not just a label, but rather a concept that immerses you in its world, vision and sounds.

Its webpage depicts this vision, a page where everything is bizarre and it feels like an alternative reality where everything is new and nothing is what you think. This is reflected in the music of the artists they work with. RAVE! Against The Machine, a festival organized by Raymondstock, offered a physical manifestation of Maligna. Within the spectrum of national electronic music, MALIGNA seeks to approach the most brilliant but most misunderstood minds. Although it offers great sound explorations, the music is extremely niche.

**Contact:** [hola@maligna.net](mailto:hola@maligna.net)

When **Homegrown Entertainment** launched, no one thought they were going to be a key player in the development of hip-hop over the last three years, as there were several labels on the scene before them. However, it was not until they appeared that several underground hip-hop talents began to solidify, unite and create stronger bonds, which gave birth to a new scene and therefore, a new revival with artists such as Alemán MC, Simpson Ahuevo, Eptos Uno and La Banda Bastön.

**Contact:** Twitter handle @HomegrownMex

**DaFuture** is one of those labels that doesn't need to make a lot of noise to get attention, but rather achieves attention by doing great things. It is directed by the musician MACROSS 82-99, who is one of the most unusual artists in the Mexican underground scene, performing in several emblematic shows by independent collectives such as Salvajenada. DaFuture seeks to be a space where artists help each other and collaborate to give life to innovative projects. They are always looking for fresh names.

**Contact:** Axel Romero and Gerald Mookie, founders ([dafuture\\_music@hotmail.com](mailto:dafuture_music@hotmail.com) or [demos@dafuture.co](mailto:demos@dafuture.co))

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**Company:** Barba (pendiente)  
**Contact:** **Twitter:** [@DiscosBarbe](https://twitter.com/DiscosBarbe)

### 2.6 Trends

Trends in musical tastes

A 2013 study showed that more than 35% of Mexicans, almost 40 million people, show a high affinity for seven musical genres. The most popular was ranchera, followed by romantic ballads, grupera, banda, norteña, salsa and cumbia.

Between 16 and 28 million people claimed to ‘enjoy’ rock and roll, pop, rock, merengue, mambo, classical, bachata, disco, electronic and jazz. Less than 15% Mexicans show an affinity for niche genres such as trova, reggaetón, blues, reggae, vallenato, hip-hop, ska, heavy metal, soul and punk. Over 60% blatantly stated their dislike for these genres, with punk being the least listened-to genre in Mexico.

PERCENTAGES		LIKE	NEUTRAL	DISLIKE	TOTAL
HIGH AFFINITY	Música Mexicana (Ranchera)	52.5	28.9	18.6	100
	Balada Romántica	45.8	31.9	22.3	100
	Grupera	45.7	32.0	22.3	100
	Banda	44.0	34.7	21.3	100
	Norteña	41.1	32.7	26.2	100
	Salsa	40.6	30.6	28.8	100
	Cumbia	38.7	33.2	28.1	100
	Rock and Roll	26.6	29.2	44.2	100
	Pop	24.9	28.1	47.0	100
	Rock	22.2	28.8	49.0	100
	Merengue	22.2	35.8	42.0	100
	Mambo	20.6	35.1	44.3	100
	Clásica	20.4	30.2	49.4	100
	Bachata	19.3	31.5	49.2	100
ENJOY	Disco	19.1	26.9	54.4	100
	Electrónica	17.2	22.3	60.5	100
	Jazz	15.7	24.2	60.1	100
	Trova	14.3	23.4	62.3	100
	Reggaetón	13.9	20.7	65.4	100
LOW AFFINITY	Blues	13.0	27.3	59.7	100
	Reggae	13.0	23.2	63.8	100
	Vallenato	10.4	21.1	68.5	100
	Hip Hop	8.5	18.8	72.7	100
	Ska	6.2	16.8	77.0	100
	Heavy Metal	5.5	18.1	76.4	100
	Soul	5.2	18.1	76.7	100
Punk	4.6	15.8	79.6	100	

This research stands out as being segmented by region and socioeconomic class, showing further information on the listening habits of Mexicans. The NSE, or socioeconomic level, is a standard developed by the Mexican Association of Market and Opinion Intelligence Agencies (AMAI). It is based on a statistical model that allows the classification of homes and their inhabitants in an objective, quantifiable way. The segmentation classifies them according to their economic and social well-being (their space, health and hygiene needs, energy, technology, educational prevention and development), dividing subjects into seven levels and considering eight variables:

1. **The education of the household's primary income earner**
2. **Number of rooms**
3. **Number of baths**
4. **Number of lamps**
5. **Number of cars**
6. **Possession of shower**
7. **Possession of home heating**
8. **Type of flat**

The AMAI levels are then defined as follows:

1. **Level A/B** is the segment with the highest standard of living in the country. This segment has all their welfare needs covered and is the only level that has the resources to invest in their future. It currently accounts for 3.9% of the homes of the country. In towns with more than 100,000 inhabitants, it accounts for 6.4% of the population.
2. **Level C+** is the segment with the second-highest standard of living in the country. This segment has all the needs for their quality of life covered. However, their investing and saving capacities are limited. This segment currently represents 9.3% of the country's homes and 14.1% of homes located in towns with more than 100,000 inhabitants.
3. **Level C** is the segment which has reached a standard of practical living with some conveniences. It has

basic infrastructure in entertainment and technology. Currently, this segment represents 10.7% of the country's homes and 15.5% of the homes in towns with more than 100,000 inhabitants.

4. **Level C-** homes are those characterized by having space and health needs covered. It has the necessary things that guarantee a minimum degree of practicality and comfort at home. This segment represents 12.8% of the country's total homes and 16.6% of homes in towns with more than 100,000 inhabitants.
5. **Levels +D and D-** have the minimum sanitary infrastructure at home. In most cases, they own a property but they are lacking some services. This is the largest segment in Mexico, accounting for over 31.8% of the country's homes and 23.8% of homes in towns with more than 100,000 inhabitants.

This specific segmentation provides valuable information for studying Mexican listening trends, despite dating from 2013.

As we have seen, the aforementioned research defines three ranges of listening habits: high hobby, regular hobby and low hobby. Researchers also choose 27 musical genres with which to poll the population so that they may respond to what music they like very much, what music they accept and what music they do not like.

Traditional and local genres such as ranchera and banda are the ones with the most engagement. Despite this, there are opportunities in genres with medium rates of acceptance such as rock and pop and, to a lesser extent, jazz and electronic. Festivals oriented towards these latter genres are on the rise. The genre orientation of consumers, divided by demographic and region, are as follows:

**Ranchera** is the favorite genre of people over 50 years of age in the southern regions with middle or low socioeconomic status and minimal primary education.

**Romantic music** is more liked by women than men. The majority of listeners have a high socioeconomic status and university education. They tend to be middle-aged and are located in the northeastern region of the country.

**Grupera music** is preferred by people under the age of 50 living in southeastern Mexico with a socioeconomic level of D and average education.

**Banda** has more success in southeastern Mexico (61%), where it has engagement with people under the age of 30.

**Salsa** is listened to heavily in the southeast of the country (57%). It is more liked by women than men, by those under 50 and by those who have middle and low socioeconomic levels.

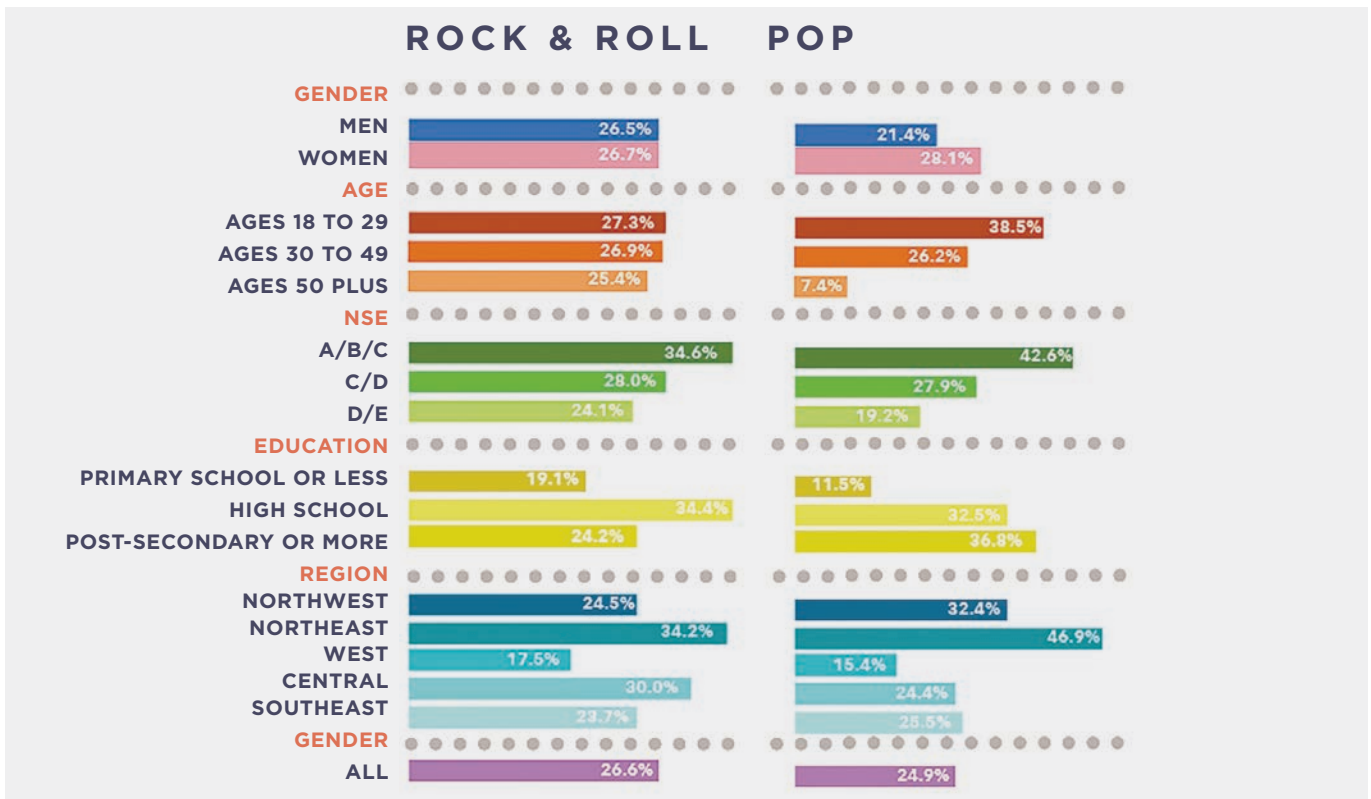
**Cumbia**, a rhythm originating in Colombia and Panama, finds its largest public in southeastern Mexico, among those with minimal primary education and a socioeconomic level of D.

**Rock and roll**, a genre popularized in the 1950s, is heard mostly by the upper and middle socioeconomic levels, A to C+, and enjoyed by 35% of people who completed high school-level education and those located in the northeast center of the country.

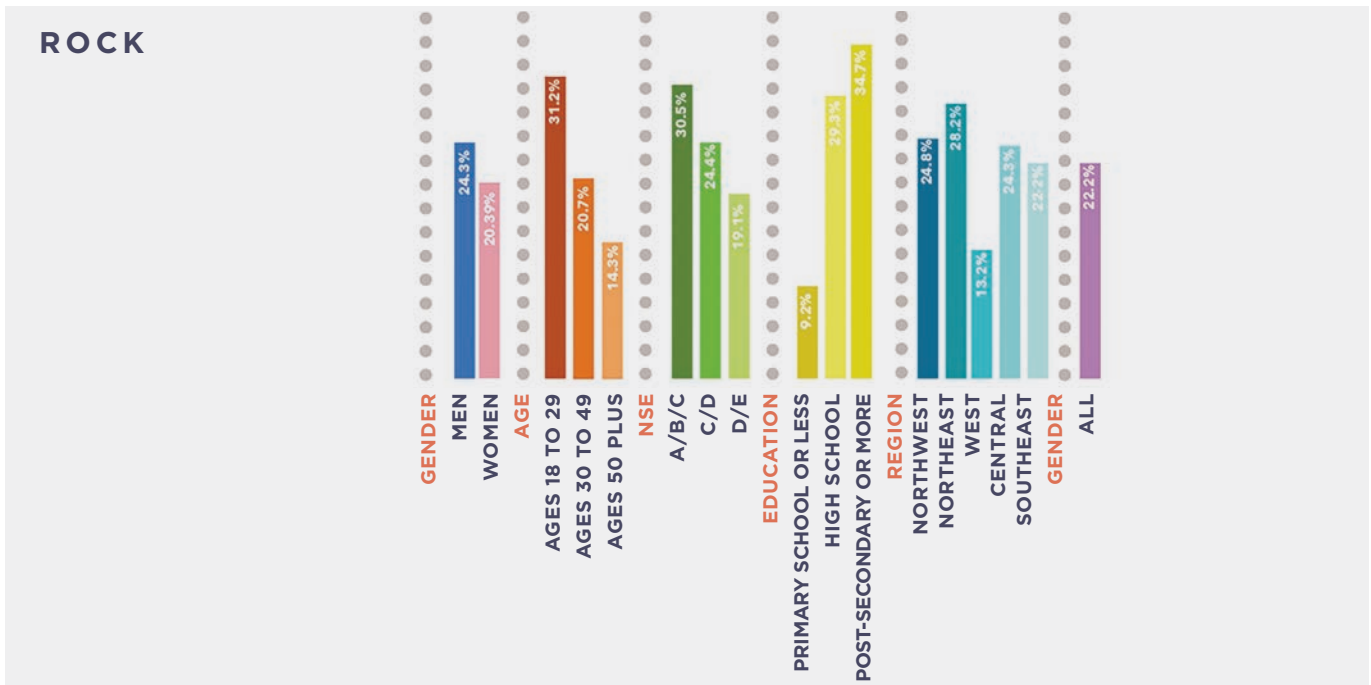
**Rock** is more liked by men than women and appeals to the youngest population. It is enjoyed by people who have a high socioeconomic status, those who have undertaken university studies and by those who live in the northeast of the country.

**Pop**, which was made to be commercialised, combines different musical genres and is more liked by women than men, by people under 30 and by those with high socioeconomic levels. It has more success in the northeastern territories of Mexico.

(Graphics of these figures are depicted throughout the section below. Translated, the categories [in order], are gender, age, NSE socioeconomic level, education, region, and percentage of overall music consumers listening to the genre.)

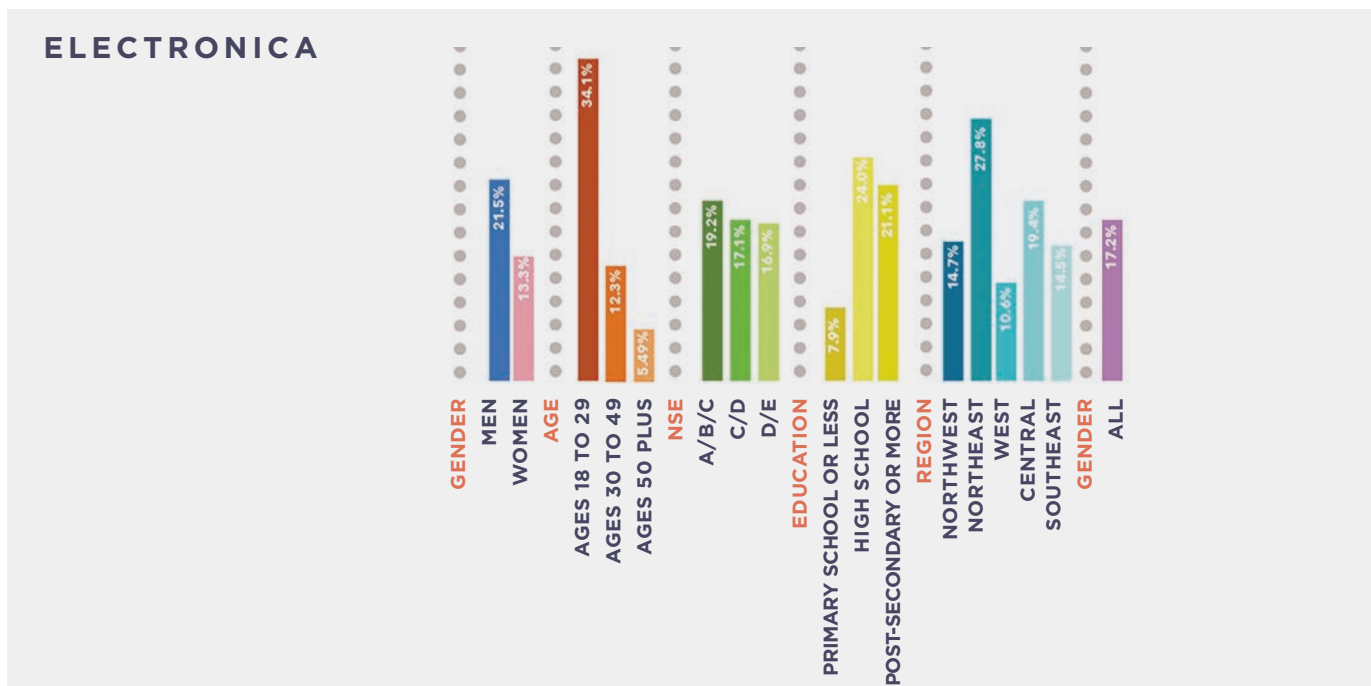


Graph 3: Percentage of pop and rock and roll acceptance according to socioeconomic features in Mexico. Source: Maldonado, L. F. (2013)



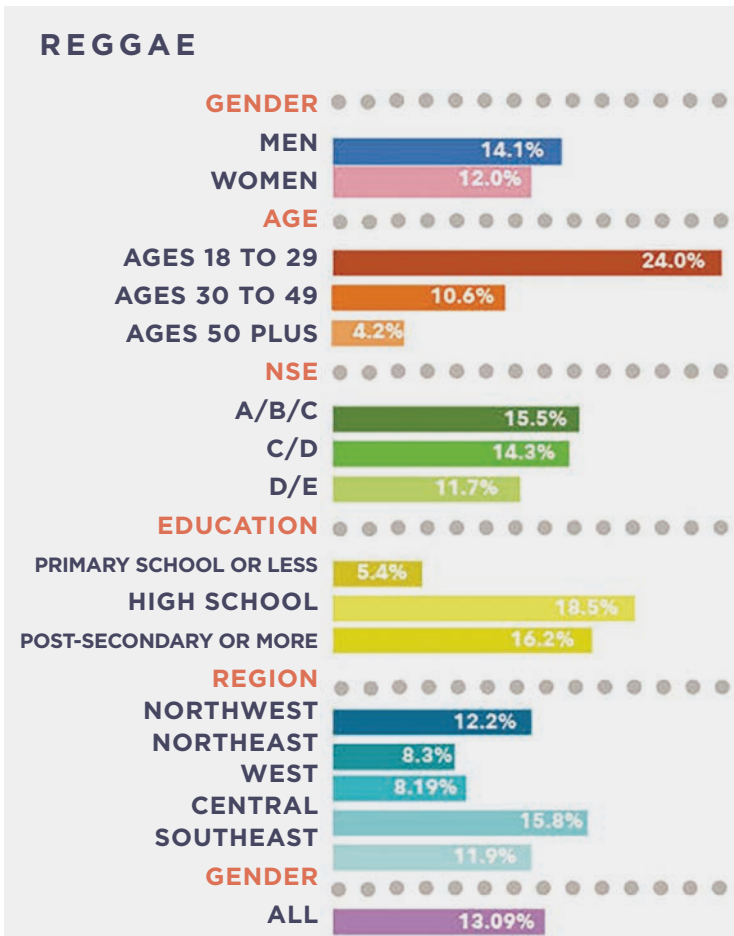
Graph 4: Percentage of rock acceptance according to socioeconomic features in Mexico  
Source: Maldonado, L. F. (2013)

- Classical music is the usual name for academic music and is liked by those who belong to a high NSE level and those who have received university education. In addition to this, it is more liked by the inhabitants of the center of the country.
- Jazz and blues have their greatest fans in university students and in the high NSE levels.
- Electronic music finds its largest audience among people under 30 and in the northeastern territories of Mexico.



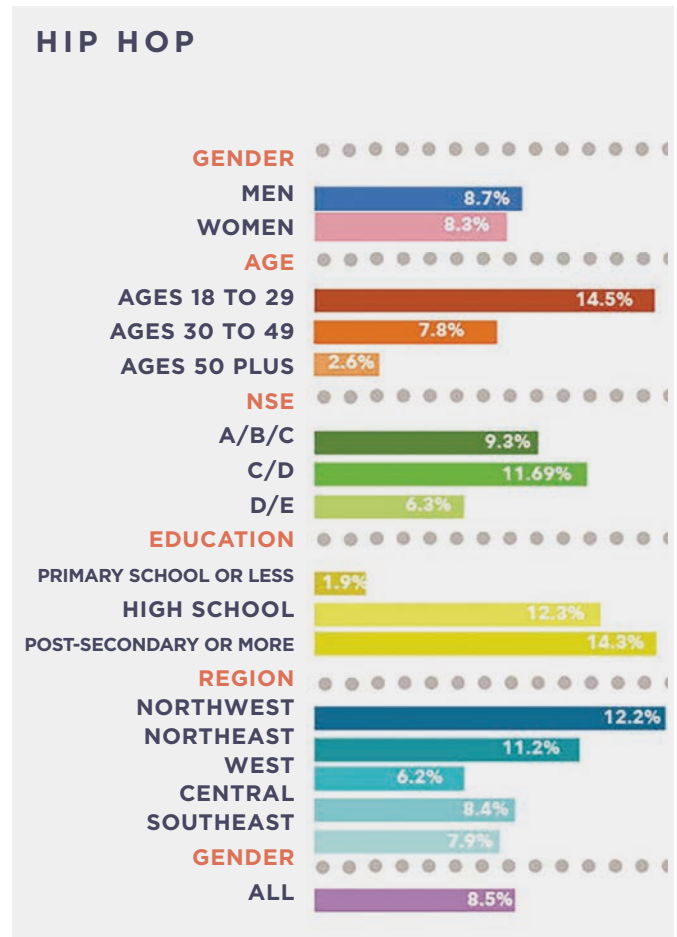
Graph 5: Percentage of electronic music acceptance according to socioeconomic features in Mexico  
Source: Maldonado, L. F. (2013)

- Reggae finds its greatest supporters in the population under 30 years of age and among those with medium levels of education.



Graph 6: Percentage of reggae music acceptance according to socioeconomic features in Mexico Source: Maldonado, L. F. (2013)

- Ska is preferred by the younger population.
- Heavy metal is listened to by university-educated students under 29 years of age, generally living in the northeastern territories of the country.
- Hip-hop is consumed primarily by under-30s who live in the northeastern regions of the country and hold university education.



Graph 7: Percentage of hip-hop acceptance according to socioeconomic features in Mexico Source: Maldonado, L. F. (2013)

- Soul is preferred by university students, those under 29 years old and people with an average socioeconomic level.
- Punk, as noted before, is considered a radical, and therefore less-accepted, genre. It finds its largest audience among those under 29 years of age.

As far as international bands, Mexico keeps with global trends and has a dedicated fanbase. However, this presents it as a fairly traditional country with limited willingness to listen to new artists.

Looking at current streaming figures from Spotify, Mexico

City holds the largest fanbase for Radiohead globally, with over 200,000 listeners. They recently gave a concert at Foro Sol.

Although the platform has only offered Beatles's catalogue for a short time, they are already one of the most popular foreign artists within users. Mexico is already one of the four countries which listen to the Beatles the most, along with USA, UK and Switzerland.

### **Trends in listening habits**

According to data from The Competitive Intelligence Unit, 64.3% of users prefer consuming music content through the internet, an equivalent of 41.6 million people. This consumption has an annual growth rate of 78%. Of the 41.6 million people, 4.2 million are monthly paid subscribers for music platforms such as Spotify, Google Play, Apple Music, Claro Music and Tidal, among others. There is an annual paid subscriber growth rate of 19.4%.

Although it has been five years since 4G networks entered the Mexican market, the coverage of 4G networks is still relatively low. Only 53 cities have 4G mobile internet connections, with services offered by Telcel, Nextel, Iusacell and Movistar. They have conducted three years of commercial exploitation, but to little avail.

This is about to change, though, because Telcel, which boasts 72.1 million users and a market share of 69%, plans to invest US\$ 6 million in the market between 2015 and 2018. Between 2014 and 2015, Movistar invested approximately US\$ 400 million, and AT&T, which boasts 8.9 million users and a market share of 9%, will invest US\$ 3 million between 2015 and 2018. By 2018, it is expected that 4G technology will cover 12% of the total mobile internet connection, compared to 1% in 2013.

As Mexico is the second largest economy in Latin America, behind Brazil, the technological exploitation around the music industry can present a good opportunity. In Mexico, there are very few startups focused on the music industry and the support of musicians. In fact, many state administrations, especially in states with major cities such as Jalisco, Leon and Mexico City, are focusing on supporting cultural enterprises around the creative industries.

According to a study by Euromonitor, only 24.8% of Mexico's total population has a credit card, and although 53.9 million debit cards were active during the third quarter of 2015, the rates for approving online transactions using debit cards are still low. Bank cards are still the main method of payment for online purchases, but retailers have become creative in developing alternative methods, including gift cards and online payments that are made at stores such as Oxxo and 7 Eleven.

### **2.7 Government strategies**

Cultural promotion and diffusion in Mexico have traditionally been understood as the state's responsibility. By 1921, the Secretary of Public Education was created, responsible for the educational and cultural training in Mexico. In the late 30s and early 40s, both the National Institute of Anthropology and History (INAH) and the National Institute for Fine Arts (INBA), the first bodies in charge of cultural issues, were founded.

In 1988 the government of the Republic issued a decree that established the creation of the National Council for Culture and the Arts (CONACULTA). It depended on the Secretary of Public Education. Since its formation, CONACULTA has promoted all the initiatives that are related to cultural and artistic subjects.

As an evolution of CONACULTA, in December 2015 the Secretary of Culture was created. This agency is now in charge of culture at a national level, managing museums, libraries and art schools that formerly belonged to the National Council for Culture and the Arts. The initiative was presented by Enrique Peña Nieto, and it assumed all the responsibilities in terms of cultural diffusion and promotion that were previously part of the Ministry of Public Education. INAH, INBA and the government institutions that worked with them also now depend on the Secretary of Culture.

From the Special Program for Culture and Arts 2014-2018 emerged the mandate of Enrique Peña Nieto that there is no aim focused on music. However, in program's fifth aim, it is said that it strives to "support artistic creation and to develop the creative industries in order to strengthen the cultural goods and services creation". However, in the breakdown of this goal, we find that the new Secretary plan does not

explicitly state that music benefits from this.

There are a few federal support systems for Mexican creators, such as FONCA. CECA also has federal resources, while other funds are municipal or state-driven, such as Fondo Proyecta of the Jalisco State Secretary, which has an exclusive fund for the circulation of artists.

Cultural promotion is one of the most important aspects of the Mexican foreign policy agenda. Promotion is carried out in collaboration with the Ministry of Culture. It is based on the guidelines and objectives agreed upon by CONACULTA (today the Ministry of Culture) in order to consolidate a cultural representation around the world.

In the coming years, cultural work will be oriented to the full exploitation of technologies, the transversality of cultural work, the promotion of the creative industry and the strengthening of Mexico's image abroad. It will seek to strengthen and redesign some of the traditional elements of the cultural area as well as preserve the cultural heritage and promote artistic creation, education and cultural investigation.

The Dual Years have also been the perfect stage for Mexico to create exchanges with numerous countries in a joint effort between several institutions. Dual Years are annual cultural exchanges in which each country presents the work and culture of another for a year, and vice versa. A good example is that of the United Kingdom, with whom Mexico celebrated their Dual Year in 2015. The activities took place with participation in the International Book Fair and Festival Cervantino, among other events.

### **2.8 Piracy in Mexico**

Mexico continues to face difficult scenarios related to music piracy and demands more rigorous law enforcement. Current efforts are focused on the sale of pirated physical copies and pay little attention to illegal digital transmission and the downloading of content.

Piracy figures are quite high. According to a study of piracy by the American Chamber, piracy has a market of around Mex\$ 505,629,810 (33.1 million CAD). According

to that study, 68% of the people interviewed have bought pirated music (CDs or DVDs) and 47% say it's their preferred buying choice.

In 2014, 56% of Internet users downloaded music or videos illegally, most of them through Ares and Youtube. Despite this, it was remarked that illegal downloads went down by 48% between 2011 and 2014. Meanwhile, the number of users consuming music online increased by 3%. The most downloaded artists were Shakira (11%), La arrolladora Banda el Limón (9%), Daddy Yankee (6%) and Banda El Recodo (5%).

### **2.9 Opportunities for Canadian artists**

Excepting major international artists, an alliance with a local partner and distributor should be contemplated before entering the Mexican market. In fact, in Colombia, international artists are collaborating more often with local artists as a strategy to become more popular, and it's working really well.

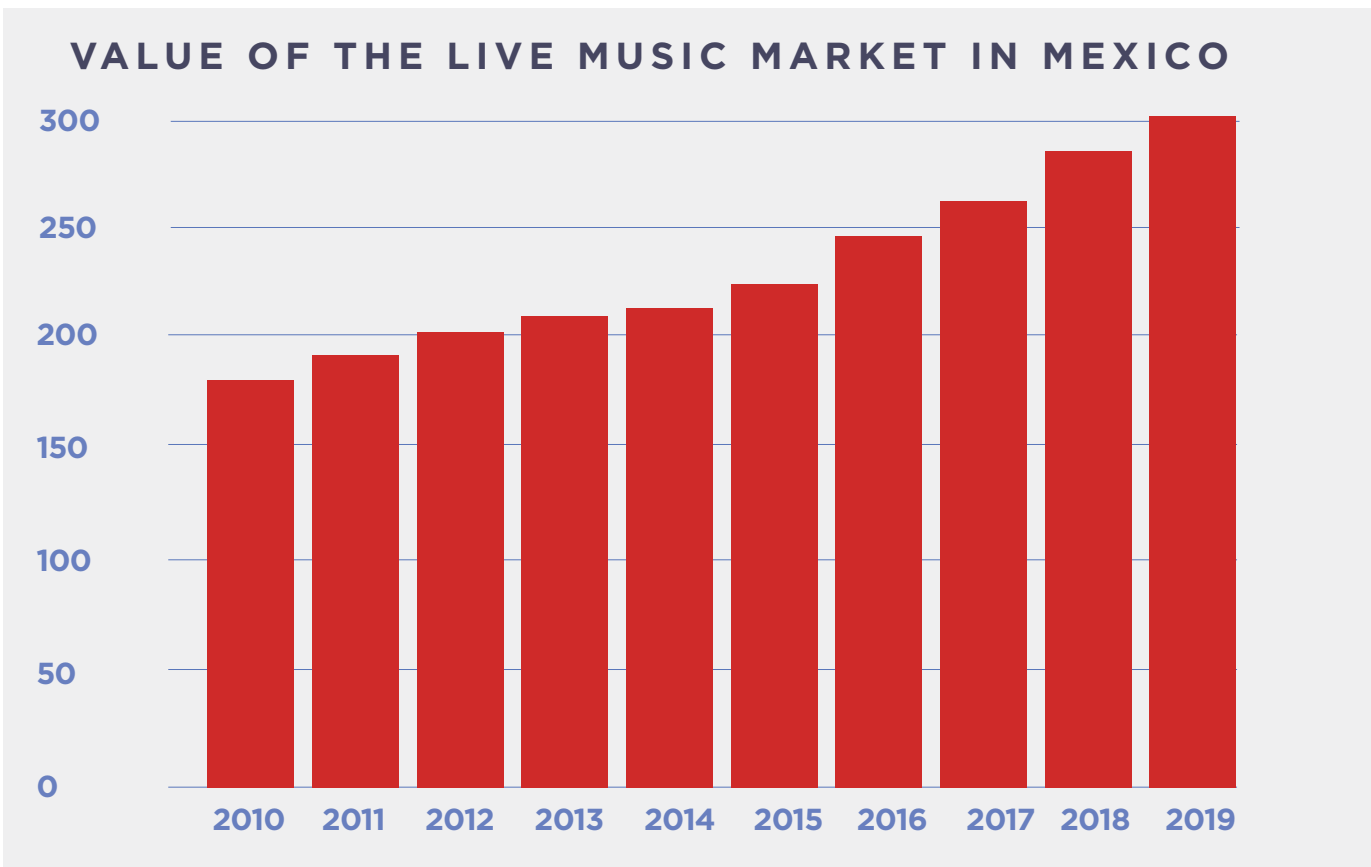
There are not many opportunities in terms of retail sales because it is a decreasing industry. Despite that, there are opportunities in direct sales at live shows and sales through the distribution of independent labels like Arts & Crafts and Intolerancia Records, which have partnerships with some online or physical stores.

There is a greater opportunity with streaming platforms, which are seen as a rising market. Although revenues are low, it is a very useful way to reach the biggest amount of listeners.



## 3. LIVE MUSIC MARKET

The PWC's 2015 study in Mexico reveals that, in terms of total revenue, the live music market is the most important.



Graph 8: Live music market value. Source: PWC

In order to understand the reasons behind that value, it is important to know which are the most important players in the Mexican music industry. These players keep most of the income, which has led to some monopolistic practices and has delayed the Mexican independent scene for many years. While Mexico is in a good moment for its live market, marked by mass festivals which demand headline acts, there are fewer and fewer artists that can sell out concerts in such large spaces. It is no secret that artists with the capabilities to sell out 40,000-capacity concerts are managed by nine companies worldwide, so it would stand to reason that only Mexico's large companies, such as OCESA or Zignia, can work with such acts.

### 3.1 Promoters

Corporación Interamericana de Entretenimiento (Interamerican Corporation of Entertainment), shortened to CIE, is the leading company in the entertainment market in Mexico and Central America. Created in the 80s, it is a primary collaborator with US companies and North American acts. In the 90s, OCESA became a subsidiary company, obtaining a 1991 agreement with Ticketmaster to sell tickets for shows in Mexico after positioning itself as a powerful player due to securing the INXS concert. Today, OCESA produces concerts, theater productions, sporting events and family and cultural events. One of its biggest successes is its management of several of the country's most prominent venues, including Teatro Metropolitan, Auditorio Nacional,

### 3. LIVE MUSIC MARKET *Opportunities for Canadian Independent Music Companies in the Mexican Music Market*

Auditorio Coca Cola and Foro Sol. In Mexico they manage the Centro Banamex, which is one of the largest and most important convention venues in the international arena. OCESA also produces Formula 1's Mexican Grand Prix.

Here are some of the most important spaces they manage:

Spaces managed by OCESA	Capacity CESA
Centro Banamex	8,500
Teatro Metropolitan	3,165
Auditorio Nacional	10,000
Auditorio Coca Cola	8,000
Palacio de los deportes	21,000
Foro Sol	65,000
Estadio Azul	33,974
Autódromo Hermanos Rodríguez	65,000
Salón José Cuervo	3,500
Teatro de los insurgentes	1,100
Plaza Condesa	1,900
Teatro Telcel	1,400
Arena Vicente Fernández	10,000
Estadio 3 de marzo	25,000
Auditorio en Monterrey	22,000

Figure 7: Total capacity in main spaces that are managed by OCESA. Own source.

OCESA's growth has been exponential and, in the first half of 2016, it ranked third out of the Worldwide Ticket Sales Top Promoters. According to the tickets sold during that period, it was only surpassed by AEG Live and LiveNation. As we can see in the figure below, the difference between all three companies was tremendous.

Worldwide Ticket Sales Top Promoters	
1. LIVE NATION	14,935,322
2. AEG Live	6,966,853
3. CIE /OCESA	1,881,405
4. FELD ENTERTAINMENT	1,800,784
5. SJM UK	1,779,058
6. TIME FOR FUN	1,750,608
7. ZIGNIA LIVE	1,052,084

Table 2: Total of ticket sales of top worldwide promoters in the first semester of 2016 Source: Pollstar

According to the director of the company, Alejandro Soberón, such an increase in revenue is due to events such as Coldplay's April 2016 concerts at Foro Sol and the El Campín stadium, Guns N' Roses at Foro Sol and the Vive Latino festival, as well as concerts by artists such as Chayanne, Marco Antonio Solís and Enrique Bunbury, among others.

Foro Sol is currently number one in the Top 50 Outdoor Festivals, with 697,315 tickets sold, while Autódromo Hermanos Rodríguez is in the 25th place, with 77,165 tickets sold. In 2015, the National Auditorium reported 831,197 tickets sold in the first half of the year. It ranked first in the 10,000-attendees category of the WorldWide TicketSales in Theaters list. Today, the National Auditorium has the first position again, with 545,897 tickets sold during the same period, surpassing the Royal Albert Hall of London (520,912), Fox Theater of Atlanta (313,745) and The Colosseum in Las Vegas (291,211).

**“Mexico is a musical destination, hosting massive concerts such as those by Rolling Stones, Paul McCartney, Roger Waters, Coldplay, Snoop Dogg and Arctic Monkeys, among others.”**

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### 3. LIVE MUSIC MARKET *Opportunities for Canadian Independent Music Companies in the Mexican Music Market*

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Zignia Live is the second most important company in the entertainment industry in Mexico. Created in 2007, the company belongs to the Avalanz group, which has also worked with Azteca Noreste TV since 1994 and owns the Superboletos ticketing company. Zignia positioned itself as a strong OCESA competitor after the construction of the Arena Ciudad de México.

Arena Ciudad de México was in the fourth position on the list of 2016 Top 200 Arena Venues, with 440,193 tickets sold. This was a record, because in the same period just one year previously, it reported 273,468 tickets sold. Monterrey Arena was in the twelfth position, with 309,563 tickets sold, an increase from last year's 260,461 tickets and 18th-place ranking.

**Spaces managed by ZIGNIA:** Centro de convenciones y exposiciones de Tamaulipas

**Capacity:** 8,000

**Spaces managed by ZIGNIA:** Arena Ciudad de México

**Capacity:** 22,300

In 2016, Zignia Live showed sustained growth, and this year it also jumped three positions in the Worldwide Ticket Sales Top Promoters list. In 2015, the production company registered 771,066 tickets sold and was in the tenth position. By 2016, it was in seventh place. Just above it was South American company, Time For Fun. Rankings and ticket sales can be seen in Table 2, above.

Although Zignia and OCESA have established themselves almost as a unique competitors, both have contributed to the growth of the industry. However, they are monitored by the Autoridad Investigadora de la Comisión Federal de Competencia Económica (Cofece) for monopolistic practices in the market of production and promotion of live shows, administration of live entertainment centers and distribution and marketing of automated ticketing. As it has been mentioned throughout the study, these two companies dominate much of the market. However, there are other companies and institutions that have also shown strength in the local market.

In Mexico, the Ministry of Culture (formerly known as Consejo Nacional para la Cultura y las Artes de México - Conaculta) is responsible for the promotion of many of the events in Mexico City. The program at the Palacio

de Bellas Artes in Mexico City depends largely on the Ministry's support, and Maria Callas, Luciano Pavarotti, Plácido Domingo, Teresa Berganza, Mstislav Rostropóvic and Rudolf Nuréyev have performed there. Great worldwide orchestras have also performed there, such as the London Philharmonic Orchestra, New York, Vienna, Moscow and Los Angeles, among others). Their program is very varied, since it presents a wide range of genres from popular music to jazz, traditional dance and even ballet, opera and Les Luthiers.

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**CULTURA UDG** is the cultural project of the University of Guadalajara (a decentralized public body) and includes the University Cultural Center, the Telmex Auditorium, Calle 2, the Estudio Cavaret Theater, the Foro Alterno and the publishing company of the University. They manage 8 spaces in the city, with the aforementioned Telmex Auditorium being the most important one. It has a maximum capacity of 11,000 spectators. The University of Guadalajara is responsible for two of the most important events in Latin America: the International Book Fair (FIL) and the Guadalajara Film Festival (FICG). They also organize many independent music series, such as Alternative Music Wednesdays at the Vivian Blumenthal Theater and the NY Jazz All Stars event, which is operated in partnership with the Lincoln Center and De Quinta Producciones at the National Auditorium in Mexico City.

The largest spaces of University of Guadalajara, the Telmex Auditorium and Centro Cultural Diana, work frequently with OCESA and Zignia Live.

The Telmex Auditorium is part of an ambitious project by the University Cultural Center in which more than 173 hectares will become a cultural corridor with several theaters, museums, parks and residential spaces. The

Telmex, which was opened in 2007, is one of the most modern spaces in the city. It has movable walls to reduce the capacity of the stage opening; movable, motorized box seats; and automated, motorized curtains. The spaces owned by Cultura UDG and their respective capacities are in the table below:

Name	Capacity
Auditorio Telmex	11,000
Centro Cultural Diana	3,194
Teatro Vivian Blumenthal	258
Teatro Experimental	380
Teatro Cavaret	3,132
Estudio Diana	120

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In Mexico, there are several strong companies dedicated to the promotion and production of events. Many of them work with OCESA and Zignia. We can highlight the following ones:

**Alive Entertainment** is based in Monterrey. They promote electronic, alternative and live music events with international artists such as David Guetta, Paul Van Dyk, Dash Berlin, Air Supply, Tiesto, Skrillex, AVICII and Zedd. Alive is the only Mexican promoter that brought the Top 10 DJs selected by DJ Magazine, breaking audience records and generating an ideal platform for new development. David Guetta played a sold out show in the Azteca Stadium (60,000 capacity) and played to a 20,000-strong audience in Cancun. In Monterrey, Skrillex performed for 15,000 people.

**Show Time** is a strong company located in Monterrey that was launched at the beginning of the 90s. They work with music shows as well as sports events, circus

performances, children's theaters and bullfights. However, Showtime was created to specialize in the music field and have managed artists such as Alejandra Guzmán, Alejandro Fernández, Juan Gabriel and Polo Polo, among others. Showtime and OCESA won the concession of the Palacio de los Deportes in Mexico City and built the Coca Cola Auditorium in Monterrey's Fundidora Park (where the Pal Norte Festival is held).

Since then, they have been working together to bring several international acts to Mexico, such as Madonna, Sting, Phil Collins, Paul McCartney, David Copperfield, Joan Manuel Serrat, INXS, Disney on Ice, Avril Lavigne, Moby, Judas Priest, Garbage, Good Charlotte, Apocalyptica etc.

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**Representaciones Artísticas Apodaca** was founded in 1978 in Monterrey. It is one of the most stable companies, with a large infrastructure, including offices in Mexico City, Leon, Guanajuato and Houston, Texas. They are oriented towards popular and regional Mexican music, but they also manage reggaeton and pop artists such as Elefante and the Chilean band Kudai. They have been responsible for organizing huge concerts by artists such as Enrique Iglesias and Daddy Yankee. Since 2012, they have also organized the Pal Norte Festival.

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**Grupo Sicario** is responsible for the Ceremonia Festival and the Blackberry Auditorium, which is a conglomerate of 11 key companies in the entertainment industry. It started as a bazaar in Mexico City's Colonia Roma. At the moment, they are organizing over 20 concerts per year. The average turnover growth of its companies' main branches of business reaches 300%. The first Sicario parties saw audiences between 2,000 and 3,000 people, but after the creation of Promotora Sicario, the

parties turned into massive concerts hosting international electronic music, in partnership with famous cigarette, alcohol and fashion brands. Grupo Sicario has an advertising agency, as well as a blog, SicarioTV, where they generate content and promote their events. They manage the Rhodesia Social Club, Mono, Limantour in Mexico City. Among their other business ventures are Arquitectura Atemporal, an architecture firm that designed the Blackberry Auditorium, and Código de Barras, a catering company that provides services and food at concerts and conventions.

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### 3.2 Booking

Most companies work in a multidisciplinary environment, combining management with booking, concert production, publishing and tour management.

**OCESA**, for example, has a management agency called OCESA SeiTrack Management, founded in 2002. They have developed artists such as Ha \* Ash, Paty Cantú, Motel and Ximena Sariñana. Other artists they have managed include Alejandra Guzmán, Zoé, Kinky, Benny Ibarra, Sasha Sokol, Pepe Aguilar, Moenia and Kabah.  
**Contact:** Alex Mizrahi Zonana, Artistic Agency Director  
Email: [amizrahi@cie.com.mx](mailto:amizrahi@cie.com.mx) or [alexmizrahi@hotmail.com](mailto:alexmizrahi@hotmail.com) or [mjimenezs@cie.com.mx](mailto:mjimenezs@cie.com.mx)

There are several independent agencies in operation, such as Kaiman Entertainment, which is located in Mexico City. It works with artists such as Kinky, Mexican Institute

of Sound, Los Bunker, Nortec, Javiera Mena, Los amigos invisibles, Vetusta Morla, Siddhartha and Enjambre. Kaiman was created in 1997 and is a leading company in the development and promotion of alternative music in Latin America. They created the “Night of the Championship”, a tour of concerts that takes place in more than 22 states of the Mexican Republic.

**Kaiman** has partnered with Apodaca Music in order to promote the music and entertainment industry. Together, they have organized shows by artists including Bostich, Jarabe de Palo, Amigos Invisibles, Quiero Club, Mexican Dubwiser, Master Plus, Cuarteto de Nos, Ana Tijoux, Sistema Solar and San Juan Project.

**Contact:** Mario Torres, Director  
Email: [mario@kaiman.com.mx](mailto:mario@kaiman.com.mx) or [contacto@kaiman.com.mx](mailto:contacto@kaiman.com.mx)

**Intolerancia Booking** (founded by the same people who created Intolerancia Records) are very well-positioned in the independent Mexican market. They work with artists from all over Latin America and, in addition to management services, they offer services for logistics, communication and press, merchandising production and contents. They manage Mexican artists such as Apanhador Só de Brasil, Carlos Marks, Descartes a Kant and Fesway. They also manage Juana fe from Chile and Violentango from Argentina among other international acts.

**Contact:** Salvador Toache, founder  
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**CAM Contratación de artistas mx** is a booking agency for both national and international artists. They work not only with music artists, but also with comedians and models.

**Oveja Negra** is a group of shows, tours and artistic careers producers. They work in the Mexican territories with artists like Los Aguas Aguas, Los Estrambóticos, Sergent Garcia, Juana la Rodillona, Seeed and Sidestepper. They have signed a contract for all North America with Los Rebels Cats, El Haragán y Cia, Panteón Rococó, Resorte, Enjambre, Porter, Los Aguas Aguas, Technicolor Fabrics and Siddhartha. They also organize the Festival del libro y cuento infantil (book and children’s story festival) and the Mezcal Fair in Mexico City.

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**Los Manejadores** was launched in 2006 by Joaquín Pavia “Wakks”, Dario Vital and Daniel Cerrillo as they began their search for new Latin American talent in the hopes of developing it. Los Manejadores has developed artists such as Enjambre, Carla Morrison, Rebel Cats, Comisario Pantera and Pedropiedra, among others. In addition, they have also worked with established artists such as Los Tres, The Growlers, Drake Bell, etc. Currently, Los Manejadores are based in Mexico City and have created alliances different countries, which has helped them develop bridges throughout Latin America. They have positioned themselves as one of the most important booking and management agencies in Latin America.

Tape Booking does all of the artist booking for festivals such as Trópico and Ceremonia. They are also a communications and marketing agency that realize strategies for brands, events production, marketing activations, design and public relations.

**Contact:** Jorge Villanueva, booking agent  
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Class Music is another important agency in Mexico with headquarters in Mexico City, Monterrey and Los Angeles. They occasionally work with Live Nation. They not only book and manage artists, but they also work to develop artist careers. Their roster boasts artists such as División Minúscula, La Gusana Ciega, PXNDX, Thermo, Finde, Tolidos, Canseco, Guillotina, Yokozuna, Pato Machete, Hey Besala and The Cosmetics.

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### 3.3 Festivals

Today, Mexico is a musical destination, hosting massive concerts such as those by Rolling Stones, Paul McCartney, Roger Waters, Coldplay, Snoop Dogg and Arctic Monkeys, among others. Festivals such as Corona Capital or Vive Latino are multitudinous events that include the most popular headliners in the world. Although there is an increasing number of independent companies each day, most festivals and major events are produced by OCESA or Zignia. The largest events are held in cities such as Mexico City, Guadalajara and Monterrey. However, the scene has gradually diversified, and fans can find many beach and small festivals held in Mexico's mid-sized cities.

#### Showcase

Emerging international artists are often selected for showcases at festivals such as FIMPRO (Guadalajara). Latin American artists also play there, especially those who are oriented towards rock, indie rock, world music and jazz.

**Attendance:** 900

**Ticket price:** US\$ 77 for 3 days

**Date:** May

**Contact:** Sergio Arbelaez, Content Director ([sarbelaez@gmail.com](mailto:sarbelaez@gmail.com))

Boiler Room, which is a streaming platform for electronic music, is one of the most successful projects in the world and has had artists such as Balcazar & Sordo, Art Department, Solomun and Bostich + Fussible perform, among others.

The massive festival RMX212 takes place every year in Guadalajara. It is organized by one of Mexico's main radio stations, RMX, which is a showcase platform for national and international bands. Their mission is to share both emerging and established artists. The festival has hosted international bands such as Woodkid, Nortec Collective, Los Amigos Invisibles and Kinky.

**Attendance:** 35,000

**Ticket price:** free

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### 3. LIVE MUSIC MARKET *Opportunities for Canadian Independent Music Companies in the Mexican Music Market*

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**Date:** November

**Contact:** Gonzalo Oliveros, Director ([goliveros@me.com](mailto:goliveros@me.com))

#### Summer

The BPM Festival has been held since 2008 in Playa del Carmen, Quintana Roo. Last year, it attracted over 50,000 people over 10 days. This festival is organized by Phillip Pulitano, Craig Pettigrew, and Alessandra Axelsson, who is originally from Canada. It is oriented towards electronic music, techno, house and deep-house, and since the festival happens during the winter holidays (second week of January), many Europeans and young people from all over the world come to enjoy the beaches and cenotes while experiencing performances by top quality DJs and artists. This festival has revolutionized the small town of Playa del Carmen, as it is estimated that each attendee spends over US\$ 500. That's why prices are higher in the area during this time. BPM Festival organizers are seeking to hold a future edition on European beaches.

**Attendance:** 60,000

**Ticket price:** US\$ 875 for 10 days

**Date:** January

**Contact:** Nitin Kalyan, Producer ([nitin.kalyan@thebpmfestival.com](mailto:nitin.kalyan@thebpmfestival.com) or [penelope@thebpmfestival.com](mailto:penelope@thebpmfestival.com))

Cumbre Tajin is a somewhat controversial festival that takes place in the archaeological zone of Tajin in the state of Veracruz. Bands such as Tool, Björk, Calle 13, Pet Shop Boys, The Smashing Pumpkins and Blind Melon have played there. In the past few years, they have experienced numerous financial problems and have been criticized by heritage conservationists.

**Attendance:** 10,000

**Ticket price:** US\$ 15 for 1 day

**Date:** March

**Contact:** Tareke Ortiz, Artistic programmer ([tarekeortiz@gmail.com](mailto:tarekeortiz@gmail.com))

In addition to BPM Festival, beach festivals have been motivated by the tourism they can attract. Although they always have numerous music shows, they are not specifically music-driven, so they often combine many disciplines. One of such festivals is the Festival Cine Los Cabos (Los Cabos Film Festival), which has been held in southern Baja California in November since 2012. The main focus of the festival is cinema, but there are

important business meetings with promoters from USA and Canada.

**Attendance:** 17,000

**Ticket price:** US\$ 3 per show

**Date:** November

Festivals in nearby areas have picked up some momentum, such as All My Friends in Rosarito in Baja California, very close to Tijuana. This is an arts and gastronomy festival where some emerging and virtually unknown bands play. All My Friends is organized by the Nrmal Collective, who also organize the Nrmal Festival in Mexico City.

**Attendance:** 4,000

**Ticket price:** US\$ 26 for 2 days

**Date:** June

**Contact:** Alfonso Muriadas, Nrmal Collective ([alfonso@nrmal.net](mailto:alfonso@nrmal.net)) or Mónica Saldaña, Nrmal Collective ([monica@nrmal.net](mailto:monica@nrmal.net))

The Trópico Festival was created in 2015 in Acapulco by the Pegaso Group, which is an economic group with companies dedicated to the real estate and hotel industry. Trópico is, first and foremost, a musical festival, but there are also showrooms for crafts, fashion, design and food. At the end of each year, thousands of people congregate at the beaches of Guerrero (Acapulco) to experience the sounds of emerging and established artists, both national and international. Their line up for 2016 included artists such as Devendra Banhart, Mount Kimbie, Timber Timbre, Bonobo, Las Palmeras and Tropicaza, among others. Trópico Festival also serves as a platform to promote national artists and discover new international acts.

**Attendance:** n/a

**Ticket price:** US\$ 108 for 3 days

**Date:** December

#### City

The largest festival in Mexico is probably Corona Capital. It seeks to position itself as a top music festival in keeping with Coachella, Lollapalooza or T in the Park. Bands such as Queens of the Stone Age, Portishead, The Editors, Imagine Dragons, Dinosaur Jr, Jack White and The Black Keys, among many others, have headlined the festival.

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### 3. LIVE MUSIC MARKET *Opportunities for Canadian Independent Music Companies in the Mexican Music Market*

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It is organized by CIE/OCESA in the Autodromo de los Hermanos Rodríguez and it boasts about 100,000 attendees per day.

**Attendance:** 100,000

**Ticket price:** US\$ 101 for 2 days

**Date:** October

Vive Latino is also organized by OCESA and has more than a decade of history. It is one of the most important festivals in Mexico, and although it hosts Anglo music, it is widely known for its Latin American talent. One of the interesting things about this festival is the Intolerante Stage, which is organized by Intolerancia Records and offers a space for independent Latin American music.

**Attendance:** 160,000

**Ticket price:** US\$ 67 for 2 days

**Date:** April

**Contact:** Jordi Puig, Director ([jpuig@cie.com.mx](mailto:jpuig@cie.com.mx))

Another dance music festival that has generated a lot of buzz is Electric Daisy Carnival in Mexico City. Boasting an attendance of around 80,000 people, it is also organized by OCESA at the Autodromo Hermanos Rodríguez. The festival is fairly new, held in Mexico since 2014.

**Attendance:** 100,000

**Ticket price:** US\$ 92 for 2 days

**Date:** February

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Coordenada is one of the most popular festivals. It takes place between the second and third week of October in Guadalajara and has an average attendance of 25,000 people. It is organized by both Cultura UdG and OCESA. Oriented towards indie pop, pop-rock, jazz and ska genres, it has an eclectic selection of artists.

**Attendance:** 25,000

**Ticket price:** US\$ 47 for 1 day

**Date:** October

**Contact:** Santiago Valencia, Producer ([info@teatrodiana.com](mailto:info@teatrodiana.com))

In Monterrey, Pa'l Norte is celebrated as one of the most popular festivals in Latin America, and it is ranked among the top 3 festivals with the greatest income in Mexico. It takes place at the Fundidora Park and is the most economically-active weekend in the state of Nuevo León. The event is organized by Apodaca Music Group, which are managers for outstanding artists and the intellectual

creators of festivals and sporting events such as Live out, Rock n Picnic, Fusion ska, Friday social scene and Tough Mudder, among others.

**Attendance:** 134,000

**Ticket price:** US\$ 64 for 2 days

**Date:** April

The Machaca Fest is also held in Monterrey. Its mission is to promote emerging bands who intend to penetrate the national market and transcend musical boundaries. Artists such as Los Ángeles Azules, Panteón Rococó, Babasónicos and Cultura Profética, among others, have performed on its stages.

**Attendance:** 80,000

**Ticket price:** US\$ 38 for each of the 2 days

**Date:** June

**Contact:** Melo Montoya, Producer ([ismaelmontoya@me.com](mailto:ismaelmontoya@me.com))

Several independent festivals have been highlighted. One of them is Nrmal Festival, which is also the title of its organizing collective. Nrmal Collective began in Monterrey organizing a small concert which also featured art and a bit of gastronomy before migrating to Mexico City. The festival's audience has become loyal because it has positioned itself as a festival with great musical quality, radiating closeness among all the participants. It is held at Deportivo Lomas Altas during the second week of March. Bands such as A Place To Bury Strangers and Battles have played at the festival, and its culinary proposal seeks to create a synesthetic experience to taste musical and gastronomic dishes simultaneously. Nrmal also collaborates with international festivals such as Austin Psych Fest in the United States. At the moment, they are working on developing the first Costa Rican edition of the Nrmal Festival in San José in collaboration with Epicenter. The project is due to launch November 2017.

**Attendance:** n/a

**Ticket price:** US\$ 57 for 2 days

**Date:** February

Festival Ceremonia was launched by Tape Music in 2013 at the Centro Dinámico Pegaso in Toluca, which is very close to Mexico City. The first edition featured artists such as Animal Collective, Toro and Moi and Purity Ring. Since then, Julian Casablancas, Flying Lotus, Snoop Dogg, The Horrors, Jungle and Chet Faker have also graced their stage. About 20 thousand people attend the festival, which has a strong focus

on hip-hop and electronic music.

**Attendance:** 20,000

**Ticket price:** US\$ 49 for 1 day

**Date:** April

The Hellow Festival began as an independent event that brought fairly unknown bands to play in Monterrey. Each year presents a Mexican talent showcase of sorts, at the end of which performs an international band. The Sounds, Empire of the Sun, Los Amigos Invisibles, Zoé, Kinky, Sussie 4 and Plastilina Mosh have all performed in Hellow Festival. In 2015 they took a step up and became a two-day event, featuring Die Antwoord, Deadmau5, MGMT, Caifanes and The Antlers, among many others.

**Attendance:** 67,000

**Ticket price:** US\$ 50 for 1 day

**Date:** August

**Contact:** Fran Martínez, Producer ([fran@hellowfest.com](mailto:fran@hellowfest.com))

#### Multi-arts

In Las Estacas, Morelos, the Carnival of Bahidorá takes place during the second week of February. Created by Alonso Gorozpe Huerdo, the intention of this festival is to gain awareness about sustainability in a natural surrounding while listening to emerging artists. It aims to be a multisensory event, with workshops on sustainability, yoga, natural gymnastics and performances. Coco Rosie, Mac Demarco, De la Soul, Clasixx and Rhye are among the artists that have performed there.

**Attendance:** 3,700

**Ticket price:** US\$ 75 for 2 days

**Date:** February

**Contact:** Iñigo Villamil, Producer ([inigo@distritoglobal.com](mailto:inigo@distritoglobal.com))

MUTEK is another festival held in Mexico City and has become a platform for the dissemination and development of digital creativity in sound, music and audiovisual arts. It has the same name as its counterpart in Montreal and has positioned itself as one of the most avant-garde festivals in Mexico for its multidisciplinary proposal with strong attention to technology. This year, it will take place at the end of October, announcing Germany as its guest of honour.

**Contact:** Damián Romero, Director

There are other types of festivals held in the city which

combine many activities. Internacional Cervantino Festival, held since 1972 in the city of Guanajuato (Mexican Bajío Region), is the fourth-largest of its kind in the world. It is supported by the Ministry of Culture and the government of the State of Guanajuato. It also counts the municipal presidency and the University of Guanajuato as collaborators. Although the festival is focused on theater, it has increased its musical activities.

**Contact:** Jorge Luis Volpi, Director ([jvolpi@conaculta.gob.mx](mailto:jvolpi@conaculta.gob.mx))

The National Fair of San Marcos (also known as “La Feria de México”) is an annual event held between April and May in Aguascalientes. It is one of the oldest parties in the country. With a perimeter of more than 90 hectares, the National Fair of San Marcos has specially adapted areas for each of its activities. One of its main attractions is San Marcos Island, a green space with a beautiful artificial lake, gastronomic area, attractions and commercial areas.

**Contact:** María Concepción Ramírez, Producer ([direcciongeneraica@aguascalientes.gob.mx](mailto:direcciongeneraica@aguascalientes.gob.mx)) or Miguel Lara, Producer ([miguel.lara71@gmail.com](mailto:miguel.lara71@gmail.com))

The multi-disciplinary Festival de las Calaveras (Calaveras Fair) is also held in Aguascalientes.

**Attendance:** 945,542

**Ticket price:** free

**Date:** October

**Contact:** Arturo León, Producer ([arturo.leon@aguascalientes.gob.mx](mailto:arturo.leon@aguascalientes.gob.mx)) or Jorge Andrade, Producer ([jorge.andrade@aguascalientes.gob.mx](mailto:jorge.andrade@aguascalientes.gob.mx))

For 25 years, the Festival Quimera has taken place in Metepec. Although it is a multi-disciplinary festival, it features some musical acts, and national artists such as Julieta Venegas and Natalia Lafourcade have performed there.

**Attendance:** 350,000

**Ticket price:** free

**Date:** October

The Festival Cultural de Mayo (May Cultural Festival) has been held in Guadalajara since its creation in 1998, when Hospicio Cabañas was declared Heritage of Humanity. Characterized by its excellent program, the event is sponsored by the government of the State of Jalisco through the Ministry of Culture, hosts municipalities and private initiatives. Every year the festival hosts guests of honour. In 2013, these were Québec and France.

**Attendance:** 2,200,000  
**Ticket price:** US\$ 15 for each show  
**Date:** May

The Festival de Cine de Guadalajara (International Film Festival in Guadalajara), abbreviated as FICG promotes new talents in Mexican cinema. The festival features many activities and events, including musical showcases.

**Attendance:** 111,000  
**Ticket price:** US\$ 5 for each show  
**Date:** March  
**Contact:** Ana Paula Suárez, Producer ([anapaula.suarez@ficg.mx](mailto:anapaula.suarez@ficg.mx))

Similarly, Festival de Cine de Morelia Film (Morelia International Film Festival) also promotes fresh Mexican cinematic talents. It has positioned itself as another city festival which features an array of disciplines, while focusing on local and international cinematic successes.

**Attendance:** 70,000  
**Ticket price:** US\$ 2 for each show  
**Date:** October  
**Contact:** Huga Van Belle, Producer ([hugo@brandstar.com.mx](mailto:hugo@brandstar.com.mx))

#### Genre

Hell & Heaven is a metal festival which has seen its ups and downs. Its 2014 edition was nearly cancelled due to security problems at its headquarters. In the end, the concert was postponed. However, it is one of the most important festivals of this genre in Latin America. Their stages have been graced by bands such as KISS, Fear Factory, Megadeth, Motörhead, Anthrax, Brujería, Venom and many more. It takes place in the Autodromo de los Hermanos Rodríguez in Mexico City.

**Attendance:** 80,000  
**Ticket price:** US\$ 45 for 1 day  
**Date:** July

The Jalisco Jazz Festival is a summer classic in Guadalajara dedicated exclusively to jazz. It offers more than 20 concerts by national and international artists. This festival has an important academic component where they invite

national and international teachers to give masterclasses to share their knowledge with attendees.

**Attendance:** n/a  
**Ticket price:** US\$ 7 for each event  
**Date:** July  
**Contact:** Gilberto Cervantes, Director ([gilberto@jaliscojazzfestival.com](mailto:gilberto@jaliscojazzfestival.com))

#### Further festival contacts

**Name:** Alejandro Serratos  
**Position:** Taller México Director  
**Company:** Festival de cine de Careyes (Careyes)  
**Contact:** [alejandro@tallermexico.com](mailto:alejandro@tallermexico.com)

**Name:** Ana Mari Irabien  
**Position:** Producer  
**Company:** Festival de jazz en la Rivera Maya  
**Contact:** [mili@rivieramayajazzfestival.com](mailto:mili@rivieramayajazzfestival.com)

**Name:** Fernando Favela  
**Position:** n/a  
**Company:** Fiestas de Octubre (Guadalajara)  
**Contact:** [ffavela@fiestasdeoctubre.com.mx](mailto:ffavela@fiestasdeoctubre.com.mx)

### 3.4 Infrastructure

The proliferation of independent music in Mexico has allowed the opening of multiple spots in which emerging bands and alternative projects of both mainstream and independent bands can be presented. These spots are mainly concentrated in Mexico's largest cities such as Mexico City, Monterrey and Guadalajara.

One of the classic spots in Monterrey for independent international and alternative music is Café Iguana, which, after 20 years of tradition, continues to host bands of different genres such as electronic, rock, reggae and ska. The McMullens (better known as the MC) and Salón Morelos are other, newer spots for independent music.

In Guadalajara, we can find the C3 and Foro Independencia, which are concert halls with mid-sized audience capacities. The C3, located in the Chapultepec area, is one of today's most important spots for the local scene, due to its constant activity and its participation in festival such as FIMPRO. Emergent and independent bands have performed



at the C3, as well as international artists such as Marky Ramone (The Ramones). The Foro Independencia is smaller, but equally powerful, due to its recent appearance on the scene. On its stage have performed emerging international bands such as Teenage Bottlerocker (USA) and Grave Robber (USA), as well as emerging Mexican bands such as Sekta Core, Bye Bye California and Colores Santos, among others. Foro Independencia is a meeting and creation point where curious and creative people find a place for artistic expressions. It is located in the heart of Guadalajara between two of the most important avenues of the City (16 de Septiembre and Calzada Independencia). Furthermore, Foro Independencia can host any type of event, since its spaces can be adjusted to obtain any capacity from 50 to 600 people.

**Primer Piso Bar** is one of the only venues in the city focused on live jazz. Excellent artists such as Willy Zavala, Jungle Trio, Los Bizantinos and Sara Valenzuela have performed here. That is why this venue has become one of the highlights of the local scene.

Also located in Guadalajara, the **KinKin** is a platform for the national and international scene. It stands out for bringing national and international artists to the city that nobody else thinks to bring, examples of which include Phillip Gorbachev, Sequencers, Soul Kitchen, Cabizbajo and Joe Fog, among others. It is located in an exclusive area of the city and at the moment is one of the primary alternative electronic music venues that stands out in the local circuit.

**Multiforo Alicia**, located in the Roma Norte area, is a classic venue in Mexico City. This venue has hosted bands from the national independent scene such as Allison, Aurum, Banda de Turistas, Sierra León, Vicente Gayo, Juan Cirerol and Miró, as well as the international independent scene, such as Sonido Gallo Negro and Chico Trujillo. Multiforo Alicia pays special attention to the national independent scene.

**The Lunario** is another important venue in Mexico City. It belongs to the National Auditorium, which is operated by a trust fund that receives income from the Federal Government, the city and the private sector. It has a capacity of 1000 people, so it offers much more intimate concerts, such as theater plays, dance and children's music concerts, as well as local and international concerts. Artists

such as Junior Boys, Concha Buika, Phoenix and Robbie Williams have performed here.

**The Roberto Cantoral Cultural Center** is a modern venue founded by SACM (Society of Authors and Composers of Mexico) and operated by a private company. It is not oriented towards any specific genre and even hosts activities from other artistic disciplines such as literature, plastic arts, dance, cinema and photography. It has a very sophisticated recording studio that can be rented for projects. The horns therein were built by the English engineer Roger Quested, who created the monitoring system at Abbey Road studios in London.

**The Imperial** holds all kinds of alternative and independent music. Some of the bands that have performed on its stage are Milton & The Pachecos, Robot Junkie Paradise, Bonnzi!, Hanakito, Ruby Tames and Super Tigres, among others. The Imperial has stood out for being a venue open to new local and international music, as well as a meeting point for emerging artists.

**Roma Records** is a vinyl record store located in the heart of Colonia Roma. It stands out for its large catalog of national and international music, as well as for being a forum for emerging bands on the local scene. In this way, it has become a meeting point for vinyl collectors and those following the independent music scene.

**Bulldog Café** is already a classic. Born 19 years ago, it revolutionized the concept of music in Mexico. Its stage has hosted bands such as Radiohead, Guns' n Roses, Poison, the Misfits and some of the best Hispanic rock bands. This venue is one of the most important within the music scene in Mexico City and the country.

**Zinco Jazz Club** is one of the most important venues in Mexico City. As its name suggests, this intimate venue is oriented towards jazz, hosting national and international figures from the jazz scenes, such as Baptiste Herbin, Minino Garay, A Lode Electric, Eduardo Piastro and Eduardo Paredes. El Convite, Jazz Place, Pizza Jazz, Las Musas de Papá Sibarita, Jazzorca, LaFaro Jazz Institute, Festival de Jazz de Polanco and JazzBook are other venues specialized in jazz. They have joined together to generate circuits for artists of this genre.

**Parker & Lenox** is also an outstanding venue. Its program

revolves around jazz, but the music it hosts ranges from World music to acid jazz. Important bands of this scene have played here, including Radio Blues, Petra and Israel Cupich Cuarteto. It is a relatively new venue that, due to its programming, has also been positioned as one of the important venues in Mexico City's jazz circuit.

**Plaza Condesa** reopened as a multifunctional venue that has a capacity of up to 1,600 people. A couple of years ago, OCESA began to develop this building in order to use it for entertainment, art and culture. This venue can be used for concerts, boxing shows, theater plays, circus events, conferences and fashion shows, among many other activities. It has a distinguished, unique and cosmopolitan atmosphere and a varied program.

#### 3.5 Touring in Mexico

Guadalajara, Mexico City and Monterrey are usually the most welcoming cities allowing foreign artists to start planning a tour through Mexico. An emerging band would usually travel by van between Guadalajara and Mexico City, as it is a safe route and only takes 6 hours. However, traveling by van to Monterrey, which is the third most important city in Mexico, would take more than ten hours. That is why this route is usually done by plane.

There are several low-cost airlines, including Volaris, Viva Aerobus and Interjet. However, luggage always ends up being a problem, as the policies are very strict. If you decide to travel with a low cost airline, the most recommended one is Interjet, as it lets you bring instruments to the cabin. Otherwise, if purchasing airline tickets in advance, you can get a good rate through Aeromexico.

It is recommended to rent a van (or a van with a chauffeur) to travel to intermediate cities such as Tijuana, Mexicali or San Luis de Potosí. It is a safe route and is usually a fascinating experience.

Flights travelling to the Caribbean areas are usually the most expensive, particularly to those cities that host electronic music festivals or boast a pop scene or more mainstream reggaeton, such as Los Cabos in the Pacific or the Mayan Riviera in the Atlantic.

The main cities have numerous backline rental companies

for all types of artists. In smaller cities, such as Aguas Calientes or San Luis de Potosí, there are also suppliers, but they are more limited. That is why, when playing in those cities, it is common to rent the backline beforehand through suppliers in the big cities. Renting backline in Los Cabos or Playa del Carmen is usually almost double or triple the cost of renting in cities such as Mexico City or Guadalajara, and it is very difficult to rent backline from any nearby area due to the large distances.

In some areas, it is not recommended to travel by van because there is a risk of being intercepted by organized crime. Before visiting a city, you should inquire about the political and security situations. Although it is generally a quiet country, it is recommended parties get to know certain areas before visiting them. These areas are: Michoacán, Guerrero, Sinaloa, Colima, Veracruz and Chihuahua. Usually, each embassy issues listed security criteria for its citizens.

For Canada, the information can be found at <https://travel.gc.ca/destinations/mexico>, with the zones marked as "high risk" for Canadians, as well as relevant information on permits, vaccines, natural disasters and security.

#### 3.6 Fees

Fees for artists vary depending on the type of event. There is a clear difference between festivals and venues. Festivals pay standard fees, since they book emerging and medium-sized artists to enrich their line up. Venues are focused on selling tickets, so they pay another type of fee.

For "undiscovered" artists who have trajectories between 1 and 3 years, play a range between 1 and 10 concerts a year, and have between 1,000 and 10,000 followers on Facebook, payments are as follows:

**Venues and Bars:** They are offered "co-production" split deals based on the sales of tickets (70% for venue and 30% for the artist)

**Festivals:** These artists usually perform at festivals for a promotional purpose. They receive lodging and production support.

For emerging artists who have trajectories between 3 and

5 years, play between 10 and 25 concerts a year, and have between 10,000 and 80,000 followers on Facebook, the payment ranges are:

**Venues and Bars:** These artists are usually paid between US\$1,500 and 3,000. They can also be offered a co-production split agreement.

**Festivals:** These artists are charging fees between US\$ 3,000 and 7,000 when playing the stages of established festivals. Travel expenses are usually subsidized by embassies, public institutions in their countries of origin or record labels.

For established artists or artists who have trajectories of more than 5 years, play between 25 and 70 concerts a year and have more than 80,000-200,000 followers on Facebook, the payments are:

**Venues and Bars:** Approximate fees range from US\$ 10,000 to 20,000.

**Festivals:** These artists receive fees between US\$ 10,000 and 40,000, plus all logistic expenses.

For mainstream artists who have a high media outreach, are being played on the radio, play more than 70 concerts a year and have more than 200,000 fans on Facebook, the payments are:

**Venues and Bars:** Fees ranges between US\$ 50,000 and 150,000.

**Festivals:** The fees don't vary much, staying between US\$ 50,000 and 150,000

The majority of the festival-attending population consists of millennials, those who speak English and are looking for new sounds. The big festivals are in need of talent, mainly coming from the indie, rock and electronic genres. This is a direct opportunity for Canadian talent in those genres, especially at the festivals Normal and Bahidorá. Experimental, world music and jazz artists have more opportunities on state-funded festivals. The latter genres would benefit from connecting with Festival Cervantino (Mexico City) or Festival de Mayo.

An interesting opportunity for independent music in Canada may be the Circuito Vive project. This is a project that will begin in January 2017, led by the record label Intolerancia in partnership with OCESA and the beer brand Cerveza Indio. They have created a non-stop festival, a circuit where the participating bands will be able to perform in 12 independent venues throughout eleven cities. The tour will begin in Mexico City and move to Cuernavaca, Toluca, Morelia, Guadalajara, León, Querétaro, Estado de México and Pachuca before finishing in Mexico City again on the Intolerante stage at Vive Latino Festival. They will travel by van and perform at venues which periodically have artists playing. The artists participating in Circuito Vive will have a unique experience touring the country, joining inter-state communication efforts and generating a number of followers in the central regions of the country. This project has an exclusive line for export agencies that want to develop artists in Mexico. This is a good opportunity, since they offer logistics, production, communication, lodging and internal transportation through the 12 cities of the circuit for approximately US\$ 7,500 per artist.

#### 3.7 Opportunities for Canadian artists

The live music industry is so big, it is definitely an area of opportunity for Canadians. Festivals organized by Ocesa and Zignia, as well as those organized in partnership with LiveNation, have more and more indie Anglo music in their line ups. Even Vive Latino, which is dedicated to Latin American music, is adding artists such as Two Door Cinema Club or The Prodigy to its line up.

## 4. PUBLISHING MARKET

### 4.1 Collecting Societies

The aim of creating the Society of Authors and Composers of Mexico (SACM) was to help Mexican composers obtain the benefits (both economical and social recognition) generated by their creations. It supports composers in the copyright registration and protection. When recorded songs are selling, the organization is responsible for collecting the royalties. 80% of the benefits are administered to the author or publisher, and the remaining 20% are kept by SACM's administration. Official rates are issued by the National Institute of Rights (INDAUTOR), as well as those rates that are previously agreed upon with the different composers associations in the country.

The SACM develops cultural activity for the benefit of its members and has several resources and extensive infrastructure. According to SACM, collections in 2014 increased by 8.2% in public communication sector or radio and special transmission, collecting a total of 656,239,000 Mexican pesos (MXN) in 2014. Television collections decreased 1.4% (cable and satellite television remained level), and cinemas and video stores increased by 2.3%. Mechanical rights fell by 12.4%, comparable to the overall record industry revenue decrease of 19.4%.

SACM has international agreements through CISAC with the Canadian collecting societies SOCAN, CMRRA and SODRAC.

PAYMENT TO SACM VS. FOREIGN COLLECTIVES EJECUCIÓN PUBLICA	THOUSANDS OF PESOS (2014)
ASCAP-USA	48,481
BMI-USA	48,230
SGAE-SPAIN	21,314
PRS-UK	11,544
SESAC-USA	5,517
SIAE-ITALY	3,347
SACEM-FRANCE	3,055
STIM-SWEDEN	2,011
SADAIC-ARGENTINA	1,695
GEMA-GERMANY	1,425
SOCAN-CANADA	1,209
ABRAMUS-BRAZIL	1,158
SAYCO-COLOMBIA	1,023
APRA-AUSTRALIA	862
UBC-BRAZIL	782
BUMA-NETHERLANDS	586
JASRAC-JAPAN	414
SCD-CHILE	310
ACUM-ISRAEL	286
KODA-DENMARK	262
OTHER	979

#### 4. PUBLISHING MARKET *Opportunities for Canadian Independent Music Companies in the Mexican Music Market*

PAYMENT TO SACM VS. FOREIGN COLLECTIVES MECHANICAL RIGHTS	THOUSANDS OF PESOS (2014)
SGAE-SPAIN	3,905
SIAE-ITALY	651
SADAIC-ARGENTINA	568
SDRM-FRANCE	303
NCB-DENMARK	223
GEMA-GERMANY	134
MCPS-ENGLAND	61
STEMRA-NETHERLANDS	60
UBC BRASIL	56
JASRAC-JAPAN	26
SCD-CHILE	13
SUISA-SWITZERLAND	11
SODRAC-CANADA	11
AMAR-BRASIL	10
SAYCO-COLOMBIA	9
AGADU-URUGUAY	7
OTHER	7

The Mexican Association of Producers of Phonograms (AMAPROFON) was created to represent and defend the rights and interests of Mexican phonographic and videographic producers. It works with many foreign associations and counts Azteca Records, EMI Music México, Marketing Musical, Music Media México, Sony Music Entertainment (Mexico), Universal Music México, WDC México, Warner Music México, FT Musik, Vástago Producciones Publishing and Intolerancia Records among its associates.

EMMACSACM is the union between EMMAC (Mexican Publishers of Music) and SACM. It was created as a singular point of contact for licensing and royalty payments, emerging as a response to the needs of users who wanted their musical works to be sold over the Internet and through cell phones.

EMMACSACM distributes the royalties generated by the use of works by Spotify, ideasmusik, Rdio, Deezer, Google Play, Coca-Cola FM and EMI Mastercard, among others. They have recently completed the development of the Common Royalty Distribution (CRD), which is a new CISAC standard that allows for the exchange of electronic royalty payment information between foreign societies and publishing companies. This way, those who want to use music on the Internet and mobile devices can obtain, through a single operation and site, a license that covers all of EMMACSACM publishing catalogs.

The payments vary, as represented in the following figures:

*Graph 9: SCAM payments to foreign collecting societies. Source: SACM 2014*

License	Percentage	Minimum rate
Download of musical works	9% of retail price	\$0.07 USD for each musical work
Streaming Music	12% of overall advertising income	\$0.005 USD for each stream
Streaming Music with subscription	12% of overall advertising income	\$0.93 USD for each subscriber per month
Webcast with subscription	11% of overall advertising income	\$0.93 USD for each subscriber per month
Video On Demand (Streaming)	0.5% of overall subscriptions and advertising income	
Sponsored Radio		\$375,000 MXN
Radio with advertising income	12% of net income	\$13,500 MXN, quarterly, with an option to pay an annual advance of \$45,000 MXN (10 months).
Radio without income	12% of net income	\$4,500 MXN, quarterly with an option to pay an annual advance of \$15,000 MXN (10 months)

Table 3: Rates for digital licenses EMMACSACM. Source: EMMACSACM

#### 4. PUBLISHING MARKET *Opportunities for Canadian Independent Music Companies in the Mexican Music Market*

Percentages of licenses for digital use in live internet transmission of concerts:

Number of people watching the concert	Percentage of income because of advertising	Minimum rate
Between 1 and 1000	8%	\$100.00 USD for each musical work used in the concert
Between 1001 and 5000	8%	\$200.00 USD for each musical work used in the concert
Between 5001 and 10000	8%	\$250.00 USD For each musical work used in the concert
Between 10001 and 25000	8%	\$0.93 USD for each subscriber per month
Video On Demand (Streaming)	8%	\$300.00 USD for each musical work used in the concert
Between 25001 and 50000	8%	\$350.00 USD for each musical work used in the concert
More than 50001	8%	\$400.00 USD for each musical work used in the concert

Table 4: Rates for live transmission EMMACSACM. Source: EMMACSACM

Somexfon is a society for producers of phonograms, videograms and multimedia. There is also the National Association of Performers, used by performers.

#### Industry Requirements

In Mexico, musical works are registered with the National Institute of Copyright (INDAUTOR), so that authorship and royalties generated by physical sales, public communication and digital media supplies can be defended. To register the works, certain requirements must be met:

1. Being a member of the Society of Authors and Composers of Mexico (SACM)
2. Filling out the work form and sending the original copy signed

**3. In the case of unpublished work, attach it in a physical format in order to be registered**

**4. If the work is signed with a publisher, send a copy of the contract.**

**\* If you are a publisher of national works, you must fill out the declaration form and send the original contract, signed with the writer.**

**\* If you are a publisher of foreign works, and are not the author's primary domestic publisher, you must fill out the foreign work form in sub-publishing.**

##### **Publishing contacts in Mexico**

In Mexico, the music industry and its business possibilities are rising, so there is a multitude of music publishers working for both international and local companies. They are the main contact between writers and producers. Their role is not only to place songs, but also to identify which songs can be successful. The following is a list of some key contacts in the Mexican publishing industry.

##### **Absolut Media Group S.A de C.V.**

Tel.: +52 (55) 1107 0790  
Web: <http://amgfilms.ws/>

##### **Alfa Music**

Email: [contacto@alfamusic.com.mx](mailto:contacto@alfamusic.com.mx)  
Web: <http://alfamusic.com.mx>

##### **Beechwood de México S.A. de C.V.**

Tel.: +52 (55) 53 95-80 89  
Email: [carmenescalante@sonyatv.com](mailto:carmenescalante@sonyatv.com)  
Web: <https://www.sonyatv.com/en>

##### **Bluewater Music México**

Web: <http://bluewatermusic.com/territory-map>

##### **Solea Music & Publishing**

Tel.: +52 331 0931382 or +52 331 9601973  
Email: [solea.music@gmail.com](mailto:solea.music@gmail.com)  
Web: <http://soleamusic.com.mx>

##### **Ediciones Mexicanas de Música A.C.**

Tel.: +52 5521 5855  
Web: <http://www.edicionesmexicanasdemusica.com>

##### **Serca Music Group**

Tel.: +52 8220 6060 or +52 8220 6061  
Email: [contacto@sercausa.com](mailto:contacto@sercausa.com)  
Web: <http://www.serca.com.mx>

##### **Sony BMG**

Email: Paul Forat Morales, Vice president of A&R  
([paul\\_forat@mx.sonymusic.com](mailto:paul_forat@mx.sonymusic.com))

##### **Universal Music Mexico**

Email: Alfredo Delgadillo ([alfredo.delgadillo@umusic.com](mailto:alfredo.delgadillo@umusic.com)) or  
Angie Perez ([angie.perez@umusic.com](mailto:angie.perez@umusic.com))

##### **Universal Music Publishing México**

Email: Victor Gonzales ([victor.gonzalez@umusic.com](mailto:victor.gonzalez@umusic.com)) or  
Angie Perez ([angie.perez@umusic.com](mailto:angie.perez@umusic.com))  
Web: <http://www.umusicpub.com/>

##### **Univision Music Publishing**

Tel.: +52 (55) 2581 6653 or +52 (55) 2581 6653

##### **Westwood Publishing**

Email: Alejandro Calles, Label manager  
([acalles@westoodent.com](mailto:acalles@westoodent.com))  
Web: <http://westwoodpublishing.com.mx/index.php>

##### **Warner Music México**

Email: Rubén Abraham, Label Manager  
([ruben.abraham@warnermusic.com](mailto:ruben.abraham@warnermusic.com))  
Web: [www.warnermusic.com](http://www.warnermusic.com)

##### **Warner Chappell Music Mexico**

Tel.: +52 (55) 5350 4417  
Web: <http://www.warnerchappell.com/>

#### **4.2 Opportunities for Canadian artists**

This area is not very developed in Mexico, because the country is largely focused on domestic consumption. The research did not discover many opportunities for Canadian musicians.



## 5. SECONDARY MARKET

### 5.1 Gaming

Forbes claims the video game market is flourishing, which is why investors such as developers and suppliers are increasingly looking towards the industry. In 2013, it boasted US\$ 829m in sales globally. In Mexico, there are some domestic companies developing video games and companies dedicated to the generation of creative technological content. Although the industry is emerging, it is gaining strength.

Video advertising is the fastest-growing sector in Mexico, with a growth of 45.6%. In 2014, it boasted revenues of US\$ 38m, which is expected to rise to US\$ 250m by 2019. The constant growth of the industry is favored by the accelerated use of mobile platforms in Mexico. In 2014, it accounted for 30% of internet advertising in Mexico growing, 113% from 2013.

While video game industry in Mexico has been a very important market, this means the competition in this market is very strong. Some video game production companies are Caraquita Games, Immersion Games, Automovilismo Virtual, Snake & Eagle Studios, DimTV, 3DMX, Atomix, Digital Moon Studio, Armed & Dangerous, Gamespot, Bonsái Design, Radical Studios, Ign and The magis Box, to name a few. Regarding video game creation, Mexico is at the forefront of the industry. There are several companies in Mexico developing video games, which is directly related to the technological growth that has occurred in recent years in Guadalajara, considered the Mexican Silicon Valley. Companies such as Continental, Hewlett Packard, among others, have offices in the Tapatío territory.

The government of Jalisco is currently supporting several projects that promote innovation through tech. It is expected that the gaming and app industries are developed in the near future as a result of this public initiative.

### 5.2 Merchandising

Merchandising has been improving and evolving since the days of bands and artists designing their own T-shirts, posters and artwork, among other things. For Mexican bands, merchandising goes hand-in-hand with promotion.

The Mexican company Kichink! Una is one of the most successful online sales platforms. It began in collaboration with 300 stores and now has over 45,000 stores in the country. The platform recently launched Kichink! ON, which supports bands that want to sell their music and their official merchandise without intermediaries. Kichink! exceeded its expectations of growth, boasting approximately 15,000 registered online stores solely focused on the sales of musical products. The platform hosts corporate stores from companies such as Universal Music Mexico, Handell and Aires de Campo, as well as those of artists and bands including Zoé, Porter, Motel and Ely Guerra. Ely Guerra, a singer-songwriter and Mexican music producer, sold 500 DVDs in a weekend, and Zoé sold 150,000 pesos (\$9,779 CAD) worth of merchandise in three months.

Mercadorama is another successful Mexican merchandising company specializing in creating T-shirts and posters for rock bands. It works with bands such as Adanowsky, Andamos Armados, Instituto Mexicano del Sonido, Los Tres, Monsieur Periné, Quiero Club, She's a Tease, Zoé and Zurdok, among others. This company, created in 2009, focuses on the production of official limited merchandising. They are an innovative company within the music industry, having made the official posters for the Coachella and Primavera Sound festivals for several consecutive years. They are the first Latin American company to produce this level of product. They have also worked with the American Poster Institute (API), with whom they participated in SXSW in 2012, and have worked with Queens of the Stone Age, The Dears, Broken Social Scene, Phoenix, Interpol, Phantogram, Tame Impala, Wolfmother and Franz Ferdinand.

The Cream Company in Monterrey, northern Mexico, is a superb company in the music business. It is influenced by hip-hop and rap and is one of the most important in the urban genre. The Cream Company Monterrey also produces events and does merchandising for those events which they produce.

These are a few examples of the merchandising market in Mexico. These days, merchandising represents an income for independent artists. Although bazaars are becoming increasingly popular, online stores are much more effective, as bands can communicate directly with fans. Festivals are also excellent for selling merchandise, and everyday there are more and more fans purchasing bands' merchandise.

### 5.3 Brand engagement

**“Video advertising is the fastest-growing sector in Mexico, with a growth of 45.6%. In 2014, it boasted revenues of US\$ 38m, which is expected to rise to US\$ 250m by 2019.”**

Technology has changed the music industry in Mexico, as in the rest of the world, but communication is still important. One successful strategy for Mexican artists is to put together a list of the songs that will be performed before each concert and post it on various social networks. This way, consumers can choose their favorite songs and thus complete what is now called a “fan set”.

There are many brands that support massive events, but they are not directly linked to any particular artist. Brewery companies such as Tecate, Indio or Corona are the most active supporters. There are also many international clothing and instrument brands that are directly supporting artists, such as Yamaha, Adidas, Ludwig and Nike. These brands are guided by the number of followers that artists have, so social networks are becoming increasingly important in the decision-making processes of brands.

Many global brands, such as Coca-Cola and Redbull, also focus on supporting artist development as part of their overall global strategies. Because of this, many local and national competitions for emerging bands (especially of rock and urban origins) are being organized.

### 5.4 Film and radio

During the first half of the 80s, radio helped spread the music of bestselling artists, but there were those who said that radio was already dead because of the penetration television had achieved. By the year 1985, music videos had revolutionized the music industry, thanks to the arrival of MTV. However, for several years, MTV was not available in Mexico, and therefore many Mexican artists and bands are more interested in placing their songs on the radio so they can be listened to by consumers easily. Still, Mexican artists are also aware of the importance of music videos, as they are a great tool to generate engagement with the audience. International bands have successfully entered the Mexican

market through music videos.

To approach the Mexican market, some international bands have decided to produce music videos in different locations in Mexico. Appealing to the Mexican identity and heritage in this way is valued by the public, as well as collaborations with popular artists of similar characteristics.

**“The best way to enter the Mexican market is through radio, because Mexicans have strong listening habits and are likely to accept recommendations from their favorite radio hosts.”**

### 5.5 Opportunities for Canadian artists

As mentioned before, merchandising has gained increasing importance as part of the overall income of artists. Stands at festivals and concerts that sell merchandise are very common and help promote physical sales. However, there is also a lot of piracy regarding unofficial products being sold. These items are sold at very low costs, and are therefore often preferred by consumers.

Regarding brands, opportunities for Canadian artists are limited, because companies usually choose to support local talent as a communication strategy (the audience is characterized by a strong sense of identity).

The best way to enter the Mexican market is through radio, because Mexicans have strong listening habits and are likely to accept recommendations from their favorite radio hosts.

Music licensing for films is still an emerging market, and there are very few companies dedicated to this type of service. Many new film directors are commissioning the compositions for their films, but it is usually done by bands with which they already have a friendship. The same happens with music licensing for video games, which is also an emerging industry. Although there are some cases of success for Mexican artists exporting into North America, such as Instituto Mexicano del Sonido being featured on FIFA, this has more to do with the work of their North American agents than the domestic ones.

## 6. MEDIA AND PUBLIC RELATIONS

**“It is very important that artists work with a media management agency, especially for radio, as it is one of the main promotional channels in the country and requires the assistance of people who have a lot of experience in the field.”**

In Mexico, public relations firms have been growing not only in popularity, but also in their roles. There are several companies which create and update social media with individualized content suitable for the Mexican market. In the same way, they create specific press kits for each customer and support the digital distribution of music. It is very important that artists work with a media management agency, especially for radio, as it is one of the main promotional channels in the country and requires the assistance of people who have a lot of experience in the field. These experts can handle situations such as “payola”, which is the term used to describe (illegal) payments to radio stations in return for airplay. This practice is becoming less common, but it is also handled with greater discretion due to the scandals that have occurred.

Contacts for PR companies

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### 6.1 Radio

**“ In Mexico City, each person listens to radio an average of 39.6 hours per week.”**

Radio still dominates the music consumed in cars, but the online threat is present. The dominance of the radio in cars will remain strong on a short-term basis, but online competition will gain strength long term. Mobile entertainment in cars is a growing demand for the automobile industry, and interactive dashboards will be more common in the future. As a result, the increasing penetration of the Internet in cars will open the door for online competitors who are already putting pressure on radio broadcasters.

Currently, 6 out of 10 people believe that their radio consumption habits have increased: 76% of people listen to it when going to work, 90% listen to it when going to school, 69% listen to it when going to the supermarket. In addition, 82% of women who identify as household decision-makers listen to it, and 83% of executives listen to it in their car. 33% of listeners are under 25, 55% of people consider radio the most credible medium and 18% of the listeners have a university degree. In Mexico City, each person listens to radio an average of 39.6 hours per week.

For this reason, traditional radio advertising will remain the most important part of the global radio market. The return of advertisers' interest in radio will ensure that advertising is the main driver of growth in all regions. Revenues from traditional radio advertising accounted for almost three quarters of total revenue in 2014.

Mexican radio could achieve its biggest change in recent decades due to trends in the global environment as well as a telecommunications reform which involves bidding on new stations. This reform leads to the entry of new players and conditions for performance activities. However, there are challenges in radio content from the perspective of age (or generational) and technology accessibility. These challenges can either be a great help or an obstacle, but they should not be ignored.

To reiterate, the radio sector is very strong in Mexico, and there are many local and regional stations that program music. Those that cater to younger demographics usually

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include Anglo content in their programming. These stations are: Máxima FM, Los 40 Principales (owned by media corporation Grupo Prisa), Radio Absoluta and RMX.

The university radio stations are an excellent opportunity for Canadian artists to start working in Mexican territories, because they are much more adventurous in their programming, and usually it is not necessary to pay “payola”. The most important stations are: Radio Ibero from the Universidad Iberoamericana (Mexico City), Radio UDG from the University of Guadalajara, and Reactor from the Mexican Radio Institute. These stations have the infrastructure to promote cultural content to the general population, and their programming is subject to the universities’ calendars and times. Content is very important for these stations, preferring original and ‘authentic’ content that otherwise would not have the chance to be promoted. Although they lack substantial funding, they are active agents in the promotion of new music and radio formats, which is why they are now assisted by the Mexican Association of Universities (ANUIES) and the Ministry of Education.

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### 6.2 Specialist media

Mexico has both print and digital media specializing in music. The most important of these may be the portal website Sopitas. It was created in 2008 by Francisco Alanís while he was working at the now-extinct radio station, Radioactivo 98.5 FM. Today, this site has about 21.5 million page views per month and boasts a Twitter following that exceeds 450,000. It does not focus exclusively on music, but there is a lot of musical content.

**Marvin** is a magazine specialized in national and international music. This magazine reviews new alternative music projects from all over the world, as well as cinematic and audiovisual content. It generates content about emerging and established artists, as well as festivals and venues from the national and international scenes. Six years ago, they created their eponymous festival, which is held in Mexico City. The event not only brings emerging national and international artists, but it also includes visual arts and gastronomic content.

**Rolling Stone Magazine** is one of the most important media platforms when referring to national musical content. It is focused on national and international music, but it also covers topics such as cinema, politics, technology, video games, fashion and art.

**Indie Rocks!** is a platform specializing in music, art and cinema, and some of its columns cover diverse subjects such as fashion, technology and video games. It is a medium of communication focused on new trends on the music industry and the lifestyle associated with the independent national and international scenes.

**El Fanzine** is focused on music, cinema, fashion, design, photography and art. It is defined as the first Mexican newspaper dedicated to national artistic and cultural proposals, covering relevant topics around the cultural

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world and the independent scenes of contemporary and everyday arts.

**Indie Space** is also specialized in music. Its contents range from concert, album and festival reviews to news about releases, events and openings. It also compiles monthly album, singles, tracks and classic songs charts.

**Mexico Indie** is a blog whose content is focused on national and international independent music. Its content is mostly relevant news from the contemporary and classical music industries, as well as news releases from both audiovisual and emerging music.

**Mr. Indie** is one of multiple blogs emerging around the music industry sharing relevant information about the national and international music industry, as well as different disciplines such as cinema, theater and dance. They share news about some mainstream and emerging bands from the national and international scene.

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Contacts for Mexican television

In order to secure a strong entry into the Mexican market, it is important to have a presence within the most popular and largest media sources. Print media and primary national television channels must also be taken into account. Advertising is much more expensive here, but usually it is a necessary thing, the last impulse that an artist needs to consolidate their career. Here some further important contacts:

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## 7. LEGAL ASPECTS

### 7.1 Visas

In order for a foreigner to obtain a work permit in Mexico, the contracting party must apply for the visa at the National Institute of Migration of Mexico. This is the only way the embassy or consulate can issue the document. Once the authorization is obtained, the foreigner must make an appointment at their nearest consular office. Within 30 days of arriving in Mexico, the foreigner must go to the National Institute of Migration in order to receive the legal certification in the Mexican territory. This endorses the stay for up to 180 days.

To apply for the visa, the foreigner must present the following documentation:

**Photocopy of the authorization of the National Institute of Migration, valid for 30 business days,**

**Printed Visa application form (both sides), fully completed and signed,**

**Passport or travel document, official identification and a photocopy of the page containing the photograph and personal data,**

**An original and photocopy of the immigration document proving your legal stay in Canada (applies to non-citizens),**

**A passport-standard photograph: 3.9 cm x 3.1 cm front-view coloured photograph with a white background, with an uncovered face and without lenses, and**

**Cash for the visa payment. If the stay is less than 180 days, migration taxes must be paid. The visa costs US \$36 and the migration process US\$ 210 USD (for those valid up to 180 days). The migration process fees for stays between 180 days and one year are US\$ 279.**

There is an agreement between Mexico and Canada to avoid double taxation, where it is only necessary to pay the taxes in one country for an activity that generated income for a person. In terms of royalties, it is decreed that 10% of income taxes will be paid in both countries. In the Artists and Sportsmen section, it is also established that, when the activity is financed by public resources or through a nonprofit association or foundation, the corresponding taxes will not be paid.

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## Opportunities for Canadian Independent Music Companies in the Panamanian Music Market

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**Researcher:** *Sound Diplomacy*

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## Bibliography

## 1. OVERVIEW

**“The Panamanian music scene lacks a formal business structure allowing artists to develop their careers.”**

Panama is a small Central American country located between the Caribbean Sea and the Pacific Ocean. The country has a total landmass of 74,177 km and a population of 3.9 million inhabitants concentrated in the capital, Panama City. This little country is most famously known for the canal that runs through it, connecting the Atlantic and Pacific Oceans. Over the past decade, Panama has seen a period of growth, becoming one of the fastest growing economies in the world. The average annual growth between 2001 and 2013 was 7.2 percent, more than double the regional average. Although the rate of growth has slowed slightly, at 6.2 percent in 2014 and 5.8 percent in 2015, it is forecasted to speed up once more, at 6.0 percent in 2016 and 6.1 and 6.2 percent in 2017 and 2018, respectively. Over the next decade, Panama’s economic growth is likely to remain one of the highest in Latin America, between 6 and 6.5 percent.

As only 51.2 percent of the population has access to the Internet, digital consumption is limited. However, mobile internet penetration appears to be high in Panama City, according to a local source, with most of the people owning a connected smartphone device.

Due to its size, Panama is often included as part of the Caribbean state in industry reports, alongside Barbados, Costa Rica, Dominican Republic, El Salvador, Guatemala and Jamaica.

Tocumen International Airport in Panama City is one of the busiest in Latin America, serving over 7 million passengers annually. It is a hub for airlines operating throughout the Caribbean, as well as serving several international flights to North America, South America and Europe.

In 2014, the country received 2.4 million tourists, well over half its population.

### 1.1. Market Size and Dynamics

Panama City is the main music hub in Panama, hosting major concerts from international artists such as Justin Bieber, Skrillex, Major Lazer and 30 Seconds to Mars, all of who have performed in the city over the past few years.

**“Local audiences are open to new foreign music, predominantly English language songs, and the independent music scene is still active despite the closure of some of the most popular indie festivals over the last couple of years.”**

Rock in Panama was highly popular during the 80s and well into the 00s, developing a national and Latin American rock circuit along with other subgenres such as hard rock, punk rock and hardcore that are still remembered today with nostalgia. However, from the late 90s onwards the government began limiting concerts that operated outside of the city’s established venues. According to our local source, the restrictions led to heavy policing in smaller venues and the independent scene suffered as a consequence. Record labels, radio stations and festivals have been forced out of operation, resulting in an industry crisis, according to our source. Among these closures were festivals that attracted large audiences for international indie acts, such as Festival Verde de Cultura and Festival Abierto. Both of these festivals had to cease operation in the last couple of years due to lack of finance, leaving the sector without any large independent festivals. Today, live music venues are still active with regular programming and eager audiences, even though there has been a shift from traditional band line-ups towards electronic music and DJ acts.

According to one of the local sources, the Panamanian music scene lacks a formal business structure allowing artists to develop their careers. It has been stated that whilst Venezuelan nationals travel to Panama to enjoy live music, Panamanians have to emigrate to nearby Colombia, Argentina, or overseas, to earn a living from making music. One of the primary challenges that Panamanian artists face is difficulty finding backline and instruments. Although there is now a distributor in place,

many Panamanian artists have had to hire instruments and backline through collectors.

Many independent Panamanian artists are self-managed and use Youtube and Soundcloud to distribute and promote their music. Spotify is the main music streaming service in the country and is also used as a music discovery platform by local artists.

Panama's society appears to be rather conservative, propelling the negative viewpoints that the government and the general public have about the music and nighttime industries. Consulted sources claim that the government does not see music as a profitable industry and therefore rarely invests in entertainment. Local audiences are open to new foreign music, predominantly English language songs, and the independent music scene is still active despite the closure of some of the most popular indie festivals over the last couple of years.

## **1.2. Trade Conferences and Industry Gatherings**

As the market industry in Panama is small, there is limited development of industry gathering events. Although there are no international trade conferences, our findings suggest that there are some national events with Latin American speakers such as the National Copyright Seminar organised by Panama's Ministry of Commerce and Panamanian Chamber of Books.

Besides this, the Panamanian participation in international music markets such as Womex or SXSW appears to be limited to artists.

## 2. RECORDED MARKET INFORMATION

*Opportunities for Canadian Independent Music Companies in the Panamanian Music Market*

# 2. RECORDED MARKET INFORMATION

Panama is listed in IFPI's Global Music Report within the Central American and Caribbean region. The total recorded music revenue for this market in 2015 was 16.2m US dollars, with a revenue per capita of 0.4 US dollars. This figure is extremely low compared to the highest revenue per capita of 20.3 US dollars held by Norway. This would suggest that the Central American and Caribbean region continues to be an underdeveloped music market, as revenue per capita is a key indicator of the market development.

While in Central America the importance of foreign music and genres plays an important role, the Panamanian market works in a different way. The market focuses on tropical, salsa and local genres. In this region, local artists are supported. The local music is similar to vallenato and is popular with local consumers. It is known as "typical music," and some renowned Panamanian artists include Osvaldo Ayala and Adonis Cárdenas. Tropical genre is similar to reggaeton, and national artists include Danger Man and Kafu Banton.

### 2.1. Sales

As with everywhere, piracy hit the Panamanian music industry in the early 2000s, with a 30-50 percent sales decline noted in 2002. This is not only attributed to the

increase in Internet access around that time, but also the strong black market that operates in Panama. It is standard for counterfeit copies of new releases, both domestic and international, to be sold at roadside stands in plain sight of the authorities.

**"As with everywhere, piracy hit the Panamanian music industry in the early 2000s, with a 30-50 percent sales decline noted in 2002. It is standard for counterfeit copies of new releases, both domestic and international, to be sold at roadside stands in plain sight of the authorities." Although Panama introduced anti-piracy laws in 1995, imposing fines of up to \$20,000 or four-year jail sentences for violators, many attest that the actual implementation of the law is only used to combat large-scale operations.**

The piracy primarily affects domestic acts, and labels began to take their own action by patrolling roadside stands to spot their releases, including extra features on their albums as an incentive to buy the legitimate product, releasing inexpensive compilation CDs as an alternative to black market mix tapes, and even introducing a black veil day on the music industry with anti-piracy TV campaigns, an hour of radio silence, and

## RECORDED MUSIC REVENUE (US\$ MILLIONS, TRADE VALUE)

YEAR	PHYSICAL	DIGITAL	PERFORMANCE RIGHTS	SYNCHRONISATION REVENUE	TOTAL (\$US)	TOTAL % CHANGE
2015	0.7	11.9	3.6	–	16.2	+33.3%
2014	1.1	8.1	3.0	–	12.2	+24.2%
2013	2.2	5.3	2.3	–	9.8	+2.2%
2012	2.7	4.9	1.9	0.1	9.6	+9.8%
2011	3.1	3.9	1.7	–	8.7	-12.4%

Figure 1: Recorded Music Revenue (US\$, Trade Value), Central America and Caribbean. Source: IFPI Global Music Report 2016. CDs sold in the region during 2015 only reached 0.1 million units, this is half the number of the units sold the previous year.

## 2. RECORDED MARKET INFORMATION

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### RECORDED MUSIC SALES VOLUME (MILLION UNITS)

YEAR	PHYSICAL	
	CD	OTHER PHYSICAL
2015	0.1	-
2014	0.2	-
2013	0.3	0.1
2012	0.4	-
2011	0.4	0.1

Figure 2: Recorded Music Sales Volume (Million Units), Central America and Caribbean. Source: IFPI Global Music Report 2016.

a 24-hour blockage of sales at record shops. The effects of these campaigns were not recorded.

Digital revenue is strong in the Central America and Caribbean regions and has surpassed physical revenue figures. According to IFPI, the digital revenue in the region in 2015 was 11.9m US dollars, whereas the physical revenue only equated to 0.7m US dollars. The trend suggests that this gap will continue to grow, as physical revenue decreases, digital revenue will continue to increase year on year.

#### 2.2. Retail

Panama, like most other countries, follows global trends. Traditional record stores are disappearing and remaining stores have had to increase their offer, selling other related music merchandise or become live show promoters in order to survive. Out of approximately fifty record shops operating in Panama in the mid 90s, only a

handful have managed to make to the present day.

The record shop Discotecas Shophy, owned by María Sofia de Carranza is one of the oldest in the country.

Volumen Brutal is a record shop in Panama City specialising in rock music. They also organise music events, and in July 2016 they brought Canadian rock band Saga to Panama.

Independent artists in Panama also sell their records through musical instrument stores, like Deka Panama or other less conventional spaces, like Armónica Shop, a versatile space where urban art, artisanal beer and skateboarding meet.

Contact: [info@armonicashop.com](mailto:info@armonicashop.com).

#### 2.3. Mobile

There are four mobile telephony operators in Panama:

- Cable & Wireless Móvil
- Digicel Panama
- Movistar
- Claro Panama

Napster has been available since 2015 in Panama through Movistar, Claro also offers its music service in Panama. Claro Música, allows the company's clients to stream music through their devices.

The mobile personalisation market remains important in the Central America and Caribbean regions. According to the IFPI's Global Music Report 2016 figures, it grew in 2015, with a revenue of 2.113m US dollars, more than 6% from the previous year.



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### DIGITAL MUSIC REVENUES BY FORMAT (US\$ MILLIONS, TRADE VALUE)

	SINGLE TRACK DOWNLOADS	FULL ALBUM DOWNLOADS	OTHER DOWNLOADS	MOBILE PERSONALISATION	PAID SUBSCRIPTIONS AND FREEMIUM STREAMS	AD-SUPPORTED STREAMS	OTHER
2015	1.109	0.569	0.036	2.113	3.531	4.384	0.138
2014	0.829	0.496	0.098	1.977	2.151	2.489	0.045
2013	0.427	0.352	0.053	2.283	0.982	1.214	0.008
2012	0.353	0.302	0.025	2.752	0.832	0.613	0.028
2011	0.080	0.004	0.006	3.296	0.494	0.032	–

Figure 3: Digital Music Revenues by Format (US\$ Millions, Trade Value), Central America and Caribbean. Source: IFPI Global Music Report 2016.

There are irregularities in Panama's mobile personalisation market: the systems work differently when compared to the rest of the region. Whilst Central American consumers prefer foreign music to music produced in the region, Panamanians focus on the regional genres such as tropical, salsa and typical music (music genre similar to vallenato born in Panama). Local influences and artists are widely supported, with many typical music artists appearing on the main ringtone and backtone download charts, for example Osvaldo Ayala and Samy & Sandra Sandoval.

#### 2.4. Streaming

The global ranking of music streaming in 2015 after IFPI's 2016 report, shows that the Central American and Caribbean states (including Barbados, Costa Rica, Dominican Republic, El Salvador, Guatemala, Jamaica and Panama) have a 73% digital share of total revenues. This makes the Caribbean states the second largest member, only surpassed by China.

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### COUNTRIES WITH MORE THAN 50% DIGITAL SHARE OF TOTAL REVENUES

COUNTRIES	% REVENUES THAT ARE DIGITAL
CHINA	89%
CENTRAL AMERICA & CARIBBEAN	73%
INDONESIA	71%
SWEDEN	68%
USA	66%
PHILIPPINES	64%
NORWAY	64%
THAILAND	64%
INDIA	62%
SINGAPORE	62%
SOUTH KOREA	62%
MEXICO	60%
AUSTRALIA	57%
DENMARK	57%
PERU	56%
NEW ZEALAND	55%
COLOMBIA	52%
CANADA	52%
TAIWAN	50%

Figure 4: Countries with more than 50% Digital Share of Total Revenues. Source: IFPI. Global Music Report 2016..

It is also worth noting that in this Caribbean and Central American market, streaming has overtaken downloads.

### MARKETS WHERE STREAMING (SUBSCRIPTION/FREEMIUM AND AD-SUPPORTED) HAS OVERTAKEN DOWNLOADS (2015)

ARGENTINA	HONG KONG	PORTUGAL
AUSTRALIA	HUNGARY	ROMANIA
AUSTRIA	ICELAND	RUSSIA
BELGIUM	INDIA	SERBIA
BOLIVIA	INDONESIA	SINGAPORE
BRAZIL	IRELAND	SLOVAKIA
BULGARIA	ISRAEL	SLOVENIA
CANADA	ITALY	SOUTH AFRICA
CENTRAL AMERICA & CARIBBEAN	JAPAN	SOUTH KOREA
CHILE	KAZAKHSTAN	SPAIN
CHINA	LATVIA	SWEDEN
COLOMBIA	LITHUANIA	SWITZERLAND
CROATIA	MALAYSIA	TAIWAN
CZECH REPUBLIC	MEXICO	THAILAND
DENMARK	NETHERLANDS	TURKEY
ECUADOR	NEW ZEALAND	UK
ESTONIA	NORWAY	UKRAINE
FINLAND	PARAGUAY	URUGUAY
FRANCE	PERU	USA
GERMANY	PHILIPPINES	
GREECE	POLAND	

Figure 4: Markets where Streaming (Subscription/Freemium and Ad-Supported) has overtaken Downloads (2015). Source: IFPI. Global Music Report 2016.

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## 2. RECORDED MARKET INFORMATION

### *Opportunities for Canadian Independent Music Companies in the Panamanian Music Market*

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According to the IFPI, Panama's list of legal online music services offering music as a download, stream or ringtone are: Apple Music, Claro Música, Deezer, Google Play, Groove Music Pass, iTunes, Microsoft Music Store, Movistar, Napster and Spotify. Although IFPI endeavours to keep the information updated, it does not guarantee the accuracy of the information supplied.

**Apple Music: SUBSCRIPTION**

**Claro Musica: DOWNLOAD, SUBSCRIPTION**

**Deezer: SUBSCRIPTION, AD-SUPPORTED**

**Deezer: SUBSCRIPTION, AD-SUPPORTED**

**Google Play Music: DOWNLOAD, SUBSCRIPTION**

**Groove Music Pass: SUBSCRIPTION**

**itunes: DOWNLOAD**

**Microsoft Music Store: DOWNLOAD**

**Movistar: DOWNLOAD**

**Napster: SUBSCRIPTION**

**Spotify: SUBSCRIPTION, AD-SUPPORTED**

### 2.5. Physical and Digital Distribution

Most independent artists share their music for free on Soundcloud, although some have integrated their music into streaming services such as Spotify.

Digital Media Music is an international company with an office in Panama, providing artists with music services, including music production, marketing and digital distribution. For \$300 US dollars, artists can get their music distributed, along with someone to handle the creation and management of digital assets.

**Contact:** [info@digitalmediamusic.com](mailto:info@digitalmediamusic.com)

### 2.6. Industry Players

Sony BMG Music, Universal Music Panamá, Discos Tamayo and G Productions are the most important formally established phonograph producers in Panama. There is no recording industry union in Panama. However there is an association called the Asociación Panameña de la Industria Fonográfica (APIF).

Sony BMG Music: In 2015 Sony Music Entertainment Central America and Caribbean was top of the country's radio rotation ranks thanks to the song El Perdón by Nicky Jam and Enrique Iglesias. In addition, that year the company's regional convention took place in Panama, with more than 100 workers in attendance and a delegation of important artists signed to the company such as Julio Iglesias, Fito Páez and Maluma.

**Contact:** [sonypana@sinfo.net](mailto:sonypana@sinfo.net)

Universal Music Panamá: Many important international artists are widely recognised in Panama, such as Alejandro Sanz, Don Omar, J Balvin and Juanes. These artists are signed to Universal Music. Contact: Universal Music Central America - @UMUSICA | Facebook

Discos Tamayo: Considered to be the last important Panamanian record label, the label was founded in 1963 and holds the largest musical catalogue in Panama and Central America. It also has a digital business division that provides image and sound digital content.

**Contact:** Jorge Luis Escobar Jaramillo, CEO and Chairman: [info@tamayorecords.com](mailto:info@tamayorecords.com)

G Productions: Not only a record label, it also provides recording, mixing and editing services.

**Contact:** [joselito@cableonda.net](mailto:joselito@cableonda.net)

Electronic music is popular in Panama, several record labels promoting electronic music operate in the country and there are a few important electronic music festivals such as The Day After.

LNM Records: Late Night Music was born in 2011 in Panama City as a movement aiming to develop local talent. After years of showcasing both local and international artists in 2015 they decided to create a record label.

**Contact:** [info@latenightmusic.org](mailto:info@latenightmusic.org)

Sess Music: Electronic music label with a minimalistic concept founded in Panama. They have organised events in Barcelona, Vienna, Milan, Medellín.

**Contact:** [musicsess@gmail.com](mailto:musicsess@gmail.com)

True Balance Records: Dedicated to underground electronic music, this label aims to help young producers distribute and promote their music, working with worldwide artists.

**Contact:** [truebalancedemos@gmail.com](mailto:truebalancedemos@gmail.com)

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#### 2.7. Trends

The most popular genres performed by Panamanian artists are reggaeton and tropical music. Artists are often signed to corporate record labels, as they are responsible for most of the music exports in the country. A new underground scene of reggaeton is emerging as an alternative to mainstream music, operating largely at smaller independent record labels and being produced by the artists themselves.

However, Spotify's Viral 50 indicates that Panama keeps up to date with global trends, proven by the top 10 tracks listened to in Panama as of 17/01/2017, which include international artists such as Ed Sheeran and Zayn. Indie-electro and DJ acts are also popular in the Panamanian market.

#### **PANAMA |DAILY| 01/16/2017**

**SHAPE OF YOU** — By Ed Sheeran

**18 PLUS— ORIGINAL MIX** — By Afro Bros

**I DONT WANNA LIVE FOREVER (FIFTY SHADES DARKER)** —  
From Fifty Shades Darker (Original Soundtrack)" — By ZAYN

**HOLDING BACK THE YEAR— 2008 Remastered Version**  
By Simply Red

**HOW FAR I'LL GO — "MOANA"** —By Alessia Cara

**BOUNCE BACK** — By Big Sean

**AHORA ME LLAMA (REMIX) (FEAT. BRYANT MYERS,  
ANONIUMS, NORIEL, BRYTIAGO & MIKY WOODZ)** — By Juhn

**SHED A LIGHT** —By Robin Schulz

**SAY SOMETHING LOVING** —By The XX

**ESTRECHEZ DE CORAZON** — By Los Prisoneros

*Illustration 1. Spotify's Viral 50 in Panama as of 17 January, 2017. Source: Spotify*

#### 2.8. Strategies

Fundación Rockistmo is a non-profit entity created with the aim to unify the Panamanian alternative music scene in order to position it in the global market. This organisation has organised concerts, workshops, seminars and a free festival in order to develop the Panamanian independent music scene and create opportunities for Panama's independent artists. Procuring a partnership with this foundation provides an interesting gateway to the Panamanian independent music market, allowing Canadian independent music artists to showcase to the local audience.

Contact: Massiel Pinzón Méndez, President:  
[fundacionrockistmo@gmail.com](mailto:fundacionrockistmo@gmail.com)

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## 3. LIVE MARKET INFORMATION

**“Canadian independent artists wishing to perform in Panama should note that by law every show performed by a foreign artist must include appearances by domestic artists.”**

Given Panama’s small landmass and the fact that more than 40% of the population live in the capital’s urban area, artists, both domestic and international, tend to concentrate their live shows around Panama City.”

Canadian independent artists wishing to perform in Panama should note that by law every show performed by a foreign artist must include appearances by both a domestic artist or band and a domestic folk band. This law is in place to protect and promote Panamanian artists.

### 3.1. Promoters

According to our local source, promoters in Panama specialise in one musical genre. Here are a few of the most important ones:

**Hard Rock Cafe** in Panama are currently hiring local rock bands to perform even if they sing in English. Hard Rock Cafes have the possibility to hire international rock bands to perform in their restaurants/venues. This is a potential stage for Canadian independent rock artists.

**ShowProPanama:** Top music promotion agency, they support a wide range of genres, predominantly promoting Spanish-speaking artists. They have also hosted many renowned international artists in Panama, such as Manà and Justin Bieber. They promote The Day After festival and were promoters of the Pixbae Rock Festival, which boasted acts such as 30 Seconds to Mars and Incubus.

**Contact:** ShowPro Panama

**Go Deep Panama:** Electronic house music promoters.  
Contact: <https://www.facebook.com/godeepproductions>

**Teatro Amador:** Performance venue and promoters. They promote a wide range of genres and acts from local and latin bands to international electronic acts. This particular place offers a special nightlife vision in Panamá. Contact: <https://www.facebook.com/teatroamadorpanama/>

**Alianza Francesa Panamá:** They promote French culture (cinema, arts, music) and French language in Panamá. They organised Fiesta de la Música Panamá, a festival promoting Panama’s emerging artists. Contact: <https://www.facebook.com/alianzafrancesapanama/>

**Punto Inicial-Plataforma Cultural:** Cultural non-profit that promotes music from Panamanian emergent artists. They organise Fiesta de la Música de Panamá. Contact: <https://www.facebook.com/PIPCultural/>

**GaitanBros:** A promotion company and production service provider that produced Katy Perry’s concert. Contact: <http://www.gaitanbrosproductions.com/contacto.php>

**Sold Out:** They define themselves as a ‘music store, entertainment service, performance venue’ in Panama City. They have been pioneers in bringing international acts to the country, such as Skrillex or Diplo, and work mainly with EDM acts, for example: Kaskade, Steve Aoki, Laidback Luke, Major Lazer, Partysquad, John Dahlback, MarcoV, Mauro Picotto, Danny Avila, Thomas Gold, Matisyahu and Far East Movement. They do collaborations with brands to put on shows, for instance Converse, Smirnoff and Hard Rock Hotel Panama. Contact: <https://www.facebook.com/SoldOutPanama>.

**Los40:** Mainstream music radio station that also produces large-scale shows, especially EDM. Contact: [40principales@los40panama.com](mailto:40principales@los40panama.com)

**Sofar Sounds:** They have produced six secret concerts. The first five took place between February and June of 2015. The last one took place on July 2016, and all six have featured local Panamanian acts.

**Contact:** [sofarsoundspty@gmail.com](mailto:sofarsoundspty@gmail.com)

### 3.2. Venues

A list of the most important Panamanian venues:

#### Villa Agustina

**Location:** Avenida A - Calle 9a., Panama City

**Genres:** Reggaeton, Hip Hop, Rap, Trap, R&B, Dub/Reggae

**Description:** Catering to international audiences, this venue

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hosts regular performances and nightclub sessions.

**Contact:** [villaagustina815@gmail.com](mailto:villaagustina815@gmail.com)

**Website:** <https://www.facebook.com/pg/lavillaagustina>

#### Pure Lounge & Terrace

**Location:** 48 Street and Uruguay Street, Panama City

**Genres:** R&B, Hip Hop, Techno, Electronic

**Description:** Comprising of a lounge that accommodates 180 people and terrace for 600 people, this elegant and stylish lounge focuses on deep house R&B, hip hop and crossover music, with international DJ's.

**Contact:** [purepanama@gmail.com](mailto:purepanama@gmail.com)

**Website:** <https://www.facebook.com/pg/CLUB-PURE-411576235602393>

#### Moods

**Location:** 48 Street and Bellavista, Panama City

**Genres:** Reggae, reggaeton and Latin music

**Description:** Popular nightclub recently renovated. On Saturdays there is live reggae.

**Contact:** 263-4923

#### El Apartamento

**Location:** Avenida Federico Boyd, Panama City

**Genres:** Alternative music, from punk rock to hip hop

**Description:** Centrally located in Panama City, this venue hosts regular performances in a cool atmosphere, complete with bar and restaurant services.

**Contact:** [@elapartmentopanama](https://www.facebook.com/elapartmentopanama/)

**Website:** <https://www.facebook.com/elapartmentopanama/>

### 3.3. Booking Agents

**Yigo Sugasti.** Singer-songwriter, music and show producer, radio speaker, manager and booking agent. He is the director of the Fundación Tocando Madera (Knocking On Wood Foundation), which has been promoting Panamanian singer-songwriters since 2004. Over the years this foundation has sponsored around 400 concerts for domestic artists, alongside workshops highlighting issues related to singer-songwriters. It plans to expand its work through the organisation of an international festival with international singer-songwriters, which could be a good opportunity for Canadian independent artists to showcase their music.

**Contact:** [yigosugasti@tocandomadera.org](mailto:yigosugasti@tocandomadera.org)

**Nina Tissera.** She was the founder and director of the Festival Verde de Cultura Musical (Green Music Culture Festival) and currently works as a producer and booking agent. She is also the founder of N Producciones Panamá, a production company focussing on innovative cultural projects in Panama.

**Contact:** [nproduccionespanama@gmail.com](mailto:nproduccionespanama@gmail.com),  
Nina Tissera LinkedIn

### 3.3. Festivals

Many festivals take place in Panama. Here is a list of the potential stages for Canadian independent artists or bands:

#### MUPA 2016:

Created in order to promote the capital as a cultural destination by the city council of Panama City, this is a free festival focused on rock, rap and reggae roots. Despite being a consolidated genre in Panama, rock is still considered the 'weakest' genre in the country. The festival works hard on the promotion of local artists and the creation of a network for regional industry professionals from Mexico, Costa Rica, Chile and Colombia. Although international artists were booked, only Latin, Spanish-speaking acts were represented. During the four-day 2016 edition of the festival, 10,000 people were in attendance.

#### TDA Festival (The Day After):

This is a three day festival with more than 40,000 attendants from around the world which focuses on international dance music, with acts such as Diplo, Skrillex, Bob Moses and Tigerlily in its latest edition (three editions of the festival have taken place to date). Prices for weekend-long passes start at just over \$100 (local currency is US dollars) making the festival appealing to kids and their parents. TDA's organiser is Disco Donnie Presents (in partnership with local on the ground promoter ShowproPanama).

**Contact:** <http://dayafter.com/>

#### Orgánica Roots Festival

This is Panama's most prominent reggae festival. It consists of a free air mega concert, with acts such as Cultura Profética and Los Cafres. Ticket prices start at \$40.

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#### **Festival Verde de Cultura Musical**

This alternative music festival had five editions before closing in 2014. It aimed to link music and sustainability. The festival gave national and international artists a space to showcase their music, with performances from Placebo, Monsieur Periné and My Favourite Robot. The festival's Facebook profile is still active and this could be an interesting contact in the country.

**Contact:** [nproduccionespanama@gmail.com](mailto:nproduccionespanama@gmail.com)

#### **Panama Jazz Festival:**

This is a week-long festival showcasing national and international artists. Acts playing at the 2017 festival are Esperanza Spalding, Dianne Reeves, Children of the Light, Terri Lyne Carrington and Bill Dobbins. The festival is organised by the Fundación Danilo Pérez, and there have been 14 annual festival editions to date. The festival not only offers concerts and jam sessions, but also clinics, showcases and auditions. It aims to offer both musical and educational events from international guest institutions such as Berklee College of Music, the New England Conservatory and the New York University Jazz Department. It has seen more than 220,000 attendees, with prices for 3-day concert passes starting at \$81.

**Contact:** Patricia Zárate, Executive Director and International Coordinator  
[patricia@panamajazzfestival.com](mailto:patricia@panamajazzfestival.com)

#### **Central American Percussion Festival:**

The Central American Percussion Festival is also organised by the Danilo Pérez Foundation and Panama Jazz Productions. Both involved in the Panama Jazz Festival, this festival focuses on the Latin American percussion tradition. It is a cultural and educational event, featuring clinics and concerts, with national and international artists performing percussion from around the world. General Admission tickets start at \$10.

**Contact:** [fepecepanama@gmail.com](mailto:fepecepanama@gmail.com)

#### **Festival Sensorial:**

This multi-genre festival will take place in February 2017. Featured genres will include rock, funk, reggae, acid jazz, soul and electronic music. Both domestic and international artists such as Dani Boom and Timothy Brownie feature in the line up. The festival will also include workshops and performances by several visual artists. Day tickets start at \$38.50.

**Website:** <https://www.festivalsensorial.com/>

#### **3.3.1. Showcase**

##### **Global Stage:**

The Global Stage is a showcase stage at the Panama Jazz Festival, where artists from around the world can perform to national and international audiences. As this is a prestigious stage, it could be a good opportunity for Canadian independent jazz artists to promote their music in Panama.

**Contact:** Patricia Zarate, CEO [patricia@panamajazzfestival.com](mailto:patricia@panamajazzfestival.com)

##### **Rock N Pop Live:**

Live events organised by the Rock N Pop radio station have been taking place for a number of years. This would be a good stage for independent Canadian rock and pop artists to perform.

**Contact:** [info@rocknpop.com.pa](mailto:info@rocknpop.com.pa)

#### **3.3.2. Summer**

##### **Musicalion:**

Free week-long family festival that takes place in February, before the Carnival. The festival is held at the Omar Park in Panama City and features family-oriented music shows, from opera and salsa to rock and reggae. Other activities like yoga or jogging are also available. This festival is a great success and has even seen Panama's First Lady in attendance.

**Contact:** <https://www.facebook.com/MusicalionPTY/>

#### **3.3.3. City**

##### **MUPA Rock:**

MUPA mentioned above, this festival is organised by the Mayor of Panama City and aims to generate cultural exchange, promote cultural development and communicate values to citizens through music. One of the goals of this event is to position festivals as a tourist attraction for Panama City. It follows the same model as other successful festivals, such as Colombian Rock to the Park. It is a free festival and, along with concerts by national and international independent and emerging bands,

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comprises of musical clinics, showcases, painting and dance workshops or exhibitions. Previously featured genres include: rock, hardcore punk, metal, reggae roots and rap.

Contact: [festivalmupa@hotmail.com](mailto:festivalmupa@hotmail.com)

<https://www.facebook.com/pg/Festival>

#### 3.3.4. Multi-Arts

##### **Macro Fest:**

The Macro Fest is a free festival where music, fashion, visual arts, cinema and design meet. Over the week-long festival, artists and participants perform and showcase their art in the streets and squares of Panama City's historical centre. In 2016 (8th edition) the festival saw more than 20,000 people in attendance, with fashion designers such as Geniesse Pierre, Ninety3some and Lony Atelier; music bands such as Pepe Bahía, Señor Loop and Xaxo; visual artists, such as Mauro Arbiza and Javier Gómez; filmmakers; bloggers and dancers, amongst others in attendance.

Contact: <https://www.facebook.com/macropfest/>

#### 3.3.5. Genre

Panama's Spanish-influenced history has infiltrated its musical heritage, and the country had a strong presence in the burgeoning jazz and salsa scenes of the early 20th century. Ruben Blades, Romulo Castro, Taira and Luis Russell were all key players, even collaborating with Louis Armstrong.

Current domestic musical developments include Spanish Reggae, Vallenato, Cumbia and Reggaeton scenes. There is also a strong Calypso scene that in its golden years produced great acts such as Lord Panama, Delicious, Two-Gun Smokey, Lady Trixie and Lord Kitty.

The mainstream musical genre is Rock en Español (Spanish Rock). This is a trend across the continent, with presence on local MTV channels and music charts. Popular acts include Radicales Libres, Skamilonga, Los Rabanes, Factor VIII, Os Almirantes, Los 33, Roba Morena, Filtro Medusa, Lemmiwinks, Skraped Knees and Calibre 57.

#### 3.4. Touring Structure

Given Panama's small landmass and the fact that more than 40% of the population live in the capital's urban area, artists, both domestic and international, tend to concentrate their live shows around Panama City. Thus no touring structure is really needed.



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## 4. PUBLISHING MARKET INFORMATION

*Opportunities for Canadian Independent Music Companies in the Panamanian Music Market*

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# 4. PUBLISHING MARKET INFORMATION

## 4.1. Collection Societies Regime

It is mandatory for a Panamanian work of intellectual property to be registered with DNDA (the government IP office) in order to claim the authorship and revenues generated by the work. This department also registers neighbouring rights for phonographic works. There are three collective management entities in Panama at the moment: SPAC, which is licensed by the government, represents artists and composers; Produce, which represents national and international phonographic producers; and PANAIE, which also represents artists, composers and performers but is not recognised by the government. Produce had distributable sums of US\$ 140,340.94 in 2015 and is currently the only collection society using BMAT technology. SPAC has ties to Canada through reciprocal agreements. Panama is a member of WIPO.

According to their annual report, 57 new musical works were registered in 2014 in the Dirección General del Derecho de Autor (DNDA), the national registry for intellectual property. A total of 672 musical works were registered between 1995 and 2014. It is mandatory for a Panamanian work of intellectual property to be registered with DNDA in order to claim the authorship and revenues generated by the work, and this department also registers neighbouring rights for phonographic works.

The Society of Authors and Composers of Panama (SPAC) is the responsible agent for the collection of intellectual property revenue for musical authors. Its license was obtained through the Ministry of Education in 1996, and it is still the first and only collection society authorised to represent the interest of authors and composers.

PANAIE collaborates with Produce and is a member of FILAIE (Iberoamerican Federation of Artists). Its vision is to become a leading collecting society in the Central American region, providing an outstanding service supported by technology. Its mission is to protect all the rights of artists and performers of the Republic of Panama, providing transparent and efficient management and encouraging their associates' professional growth through the payment of their rights.

Produce is the Panamanian society of phonographic producers. It is a civil non-profit organisation with the purpose of safeguarding the interests of both national and international phonographic producers whose phonographic products are being commercialised in the Republic of Panama. It was founded in 2007, having distributed more than 900,000 US dollars among its associates, and is member of the IFPI.

## 4.2. Sync Opportunities for English Catalogues

The film industry is growing in Panama. Following a new law enacted in 2012 by the government of Panama in order to promote this industry, it has already generated around 30 million US dollars for the country. This law also encourages foreign productions to be shot in Panama through tax advantages, and due to this around 110 foreign productions have used Panama as a location. This could be a good opportunity for Canadian independent artists to sync their catalogues as foreign productions are more likely to include English spoken music than Panamanian music.

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## 5. SECONDARY MARKET

*Opportunities for Canadian Independent Music Companies in the Panamanian Music Market*

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# 5. SECONDARY MARKET

### 5.1. Gaming

Panama does not yet have a significant gaming industry. However, gaming companies have formed in recent years, and this could provide Canadian independent artists with a good opportunity to synchronise their catalogue.

Leo-Games is the game developer division of Leo, a technology solution provider firm established in Panama City in 2010. Leo has offices in the United States and Costa Rica. Leo-Games works with the latest technology and specialises in visual arts, character animation and 3D modelling. Their services include mobile game development, 3D game development, console game development and Facebook game development.

**Contact:** [info@leo.com.pa](mailto:info@leo.com.pa)

Nordic Mist Games is an independent game studio established in Panama City in 2012. They are the first gaming company in Panama to produce a viral game.

**Contact:** [info@nordicmistgames.com](mailto:info@nordicmistgames.com)

### 5.2. Merchandise

One of the most important merchandising companies in the Central and South American region is Live Shows Merchandising. Despite being based in Mexico, they are leaders in merchandise marketing at live shows in other countries in the area, such as Panama, Guatemala, Argentina and Costa Rica. They have international partnerships with several merchandise agencies and show production companies and have developed the official merchandise for renowned international artists such as Madonna and U2.

**Contact:** [info@liveshowsgroup.com](mailto:info@liveshowsgroup.com)

### 5.3. Brand Engagement

Live shows and musical events in Panama are mainly sponsored by beverage brands. Brands have found that these events are the perfect spot to connect with their potential customers whilst creating a stronger brand image. Trying to achieve this type of partnership with any Canadian beverage brand willing to export to

Panama or enhance its business there could be a good opportunity for Canadian independent artists. Here are some examples of brand engagement in the Panamanian music industry:

American beer company Miller has promoted shows and toured the country to celebrate the 4th of July, and they even produced a music festival called American Extravaganza to promote US rock bands.

Last year Budweiser sponsored a tour called Off The Record Tour 2016. The main events were two shows by Pennywise, Polyphase and Pepe Bahia.

Smirnoff has sponsored musical events such as Smirnoff Daylight (focused on electronic and crossover music) and Full Moon Dance (electronic party).

### 5.4. Other Players

LevelHouseMusic.com (Heart of Electronic Music @ Panama) is a website focused on electronic music. The website provides information about the electronic music scene in Panama City and supports its continued growth. In February 2017, the first Level House Music showcase is scheduled to take place. This platform would be a good tool for Canadian electronic independent artists to tap into the Panamanian market.

**Contact:** [www.facebook.com/levelhousemusic.panama](http://www.facebook.com/levelhousemusic.panama)

### 5.5. Publishing for Recorded Music

In order to protect the copyright and manage the author's royalty rights, musical works in Panama must be registered both at the Author's Rights National Bureau and at the Panamanian Society of Authors and Composers (SPAC).

From what we could find, Panamanian artists working with international record labels usually publish their music through these companies' publishing divisions, whereas less established independent artists tend to not register their work.

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## 5. SECONDARY MARKET

*Opportunities for Canadian Independent Music Companies in the Panamanian Music Market*

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### 5.6. Film, Radio, Gaming: Ancillary Opportunities for Licensing Recorded Music

**“The film industry is growing in Panama. Following a new law enacted in 2012 by the government of Panama in order to promote the industry, it has already generated around 30 million US dollars for the country.”**

SPAC collected US\$1,184,054 in 2013. The biggest revenues came from cruise ships (288,076 USD), television (254,360 USD), cable television (147,421 USD), concert/events (288,072 USD) and jukeboxes (118,226 USD).

These are potential markets to look at in order to introduce new content. One of the largest areas for royalty collection is casinos, where royalties for live entertainment totalled 33,513 USD total in Panama in 2013.

Achieving partnerships with the cruise companies could also be an excellent business opportunity for Canadian independent artists. Given that many of their passengers in the Caribbean region are US or Canadian citizens, cruise lines would be more open to including Canadian independent artists' catalogue in their musical programming. Considering the large number of ships cruising the region, this could be a great opportunity to reach a wider audience.

As the gaming industry is still developing in Panama, the synchronization opportunities are limited. In order to be more attractive, offering reduced price catalogues could be a good strategy for Canadian independent artists willing to place songs in games developed in Panama.

## 6. MEDIA AND PR

### 6.1. How the PR Market Works

These are the approximate advertising costs (based on 2005 standards and mainstream media):

- Newspapers: from US\$1,200 full-page to \$600 half-page
- Magazines: US\$1,000 full-page to US\$500 half-page
- Partnerships between record labels and distributors frequently cover advertising costs.
- Public Relations: approximately US\$1,000-1,200 per month, per person
- Posters: US\$200 for every 100 units
- Promotional flyers: US\$1,200

### 6.2. Media and PR opportunities for Canadian content

Usually Panamanian newspapers include social or entertainment sections where music news is covered. These are the country's most important newspapers:

La Estrella de Panama is the country's oldest newspaper. It has both a social and events section that provides information about music and artists.  
Website: <http://laestrella.com.pa/>

**Contact:** [online@laestrella.com.pa](mailto:online@laestrella.com.pa)

La Prensa has an entertainment section that through its cultural sub-section informs about musical news.  
Website: <http://www.prensa.com/>

**Contact:** [web@prensa.com](mailto:web@prensa.com)

Panama America has an extended entertainment section.

Website: <http://www.panamaamerica.com.pa/>

**Contact:** [Emailinfo@epasa.com](mailto:Emailinfo@epasa.com)

There are also some magazines (digital and print) that specialise in/publish music content in Panama:

Prensa Rock, a rock news website from Panama, publishes news from local artists but also many

international news and reviews. It has 1,800 Facebook likes and 950 followers on Twitter.

Website: <http://prensarock.com/>

**Contact:** [infoprensarock@gmail.com](mailto:infoprensarock@gmail.com)

DJ Beats Magazine is a Panamanian digital musical magazine founded in 2013 by artist Abi Melechh. It has quarterly editions, with more than ten thousand subscribers in fourteen countries. It includes both domestic and international content.

Website: <http://djbeatsmag.com/>

**Contact:** [djbeatsmagazine@gmail.com](mailto:djbeatsmagazine@gmail.com)

Sala de Espera is a free magazine distributed in spas, hairdressers, banks and doctor's offices, with 10,000 units printed every month. Information about domestic and international artists is widely covered.

Website: <http://www.saladeespera.com.pa/>

Although there are not many specialised music programmes on Panamanian TV channels, relevant musical information is usually provided in the newscasts or in the lifestyle or entertainment programmes. Musical events taking place in Panama are covered, as well as information about important foreign artists. Some of the most relevant TV channels are:

+23tv is a music video channel that also provides news about music and events on its website.

Website: <http://www.mas23tv.com/>

Telemetro is a Panamanian open TV channel that belongs to Medcom Corporation. There is a section on their website specifically dedicated to music news.

Website: <http://www.telemetro.com/>

Mall TV also belongs to Medcom Corporation. It is a lifestyle channel that offers coverage of the entertainment world.

Website: <http://malltv.com.pa/>

Televisora Nacional is an open television channel that has included many music oriented entertainment shows in its programming.

Website: <http://www.tvn-2.com/>

Many of the radio stations in Panama are Latin music oriented. However there some stations that play international music, such as:

Rock n Pop Panama: a pop and rock oriented station streaming music and programmes. They also organise live events such as Rock n Pop Live.

Website: <http://www.rocknpop.com.pa/>

Los40 Panama: a popular mainstream station providing information about concerts, with sister stations in several Spanish speaking countries.

Website: <http://los40.com.pa/>

### 6.3. Key Media and PR Contacts

Eventos Top Panama promotes major international events in the country. They offer digital advertising, social media, videos and graphic design. They promote shows and events through their website.

**Contact:** [info@eventostoppanama.com](mailto:info@eventostoppanama.com)

Abi Melechh, Founder of DJ Beats Magazine:

**Contact:** [info@abimelechh.com](mailto:info@abimelechh.com)

Fuzion Panama offers an innovative digital service specialised in promoting diverse artists.

**Contact:** <https://twitter.com/FuzionPanama>

## **7. VISA SYSTEM, TAX WITHHOLDING POLICY AND OTHER PRACTICAL INFORMATION FOR CANADIAN ARTISTS TO CONSIDER**

In order to perform in Panama, foreign artists need to obtain a visa for transitory or event workers. The engaging company or promoter will have to submit the application form along with all mandatory documents. More information about the application form can be found online.

All foreign artists wishing to showcase their work in Panama will also need to apply for a work permit at least 20 days prior to the show. This application will need to be accompanied by the employment contract signed by the artist, where all the conditions, including the artist's fee, must be specified. Income tax and union fees will also have to be paid by the artists.

As previously mentioned, an important legal requirement for foreign artists performing in Panama is the obligation to include acts by both a domestic artist or band and a domestic folk band in their show. The contracts for both the domestic artist and the folk band will also have to be submitted along with the work permit application.

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Opportunities for Canadian Independent Music Companies in the  
Peruvian Music Market

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**Researcher:** *Guido Borasino Sambrailo / Camilo Riveros*

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# 1. OVERVIEW

## 1.1 Market size and dynamics

**“The music industry during the 20th century had two well-defined eras: (1) the period of traditional market operation in which labels represented foreign companies (Decca, Atlantic, Capitol, Epic, Parlophone, MCA, Columbia, CBS, Sun, etc.) and (2) the period of piracy and informal dynamics.”**

The Peruvian music market is broad and diverse, reflective of the culture of the Peruvian people. There are theories and concepts of traditional dynamics in the analysis of music as a cultural and economic practice that cannot be applied to Peru’s music market. The music industry during the 20th century had two well-defined eras: (1) the period of traditional market operation in which labels represented foreign companies (Decca, Atlantic, Capitol, Epic, Parlophone, MCA, Columbia, CBS, Sun, etc.) and (2) the period of piracy and informal dynamics. The first period, before the 80s, was characterised by traditional music companies financing, releasing and promoting their local catalogue, on top of licensing and representing the major US and UK labels of the time. During the second period, the embargo on foreign goods fed the blossoming cassette piracy market, a cornerstone of popular culture. With the mass use of CDs and the possibility of domestic copies, the piracy market increased to comprise an estimated 97% of the phonographic market. This situation restricted the involvement of primary music companies, and now the majors (Sony Music Entertainment, Universal Music and Warner) only have representation for distribution.

Parallel to the political violence of the 1980s, the globalization process during the 90s and the mass use of internet in the 2000s, Peru’s population developed different music circuits that set up the main structures for Peruvian music markets today: the formal mainstream, led by the radios and TV stations; the music circuits of the migrants of the inner provinces; the independent music scenes; and the “work for hire” musician circuit that includes classical music. That basic structure remains to this day. Although each of the scenes has areas of overlap and intercommunication, each listed segment has its own market and set of production-distribution-consumption logics.

## BOX 1: MUSIC SCENES

### *Mainstream among cultural diversity*

Mainstream independent: Singer/songwriter and pop and ballad soloist. (Radio Ritmo, Corazón)

Mainstream showbiz: Current artists of cumbia, salsa and reggaeton. (La Zona, La Calle, La Mega, Nueva Q, Panamericana, Radiomar, etc.)

Mainstream radio: 60s, 70s, and 80s Latin, UK and US, pop and rock music. (Oxígeno, Oasis, Studio 92, Planeta, etc.)

Andean mainstream: Tropical music and modern huayno

System of Traditional Parties: syncretism between pre-Hispanic, African, Catholic and contemporary rituals in the annual calendar, linked to holidays and agricultural cycles.

### *The independents*

- Pop rock
- Electronic music
- Singer/songwriter
- Indie pop: dance rock, post punk revival
- Dance music parties
- Traditional Peruvian music
- Jazz
- Hip Hop and urban
- Metal: doom, heavy, thrash, death, etc.
- Transnational underground: punk, hardcore, crust, melodic hardcore, post hardcore, shoegaze, post rock, garage rock, rock & roll, rockabilly, ska, reggae, dub, funk, and others
- Contemporary and experimental music
- Traditional foreign music
- International shows and festivals

### *Work for hire musicians*

- Classical music
- Pop rock covers
- Tropical covers

### 1.2 How to navigate the marketplace

The players in the Peruvian marketplace can be divided into the following categories:

- Mainstream artists and bands: this category refers to the artists and bands that are controlled by a major international music firm.
- Independent artists and bands: this category refers to the artists and bands that are not controlled by a major international music firm. Most Peruvian artists and bands can be considered a part of this category. However, it is important to differentiate between artists and bands of the regional mainstream music scene, which is composed mainly of Latin music scenes, and the bands outside of this Latin mainstream circuit, commonly related to genres such as rock, reggae, punk, funk, metal, ska, etc.
- Managers of mainstream artists
- Managers of independent artists (in most of these cases, members of the bands play this role)
- Audio Engineers
- Recording Studios
- Mastering Studios
- Independent record labels of non-mainstream music
- Independent record labels of mainstream Peruvian music
- Promoters and producers of independent music shows
- Promoters and producers of mainstream music shows
- Radios of mainstream Spanish-language international music
- Radios of mainstream English-language international music
- Radios of independent English-languages international music
- Traditional media journalists

- Online music journalists
- TV channels
- Music video directors/producers
- Aggregators and licensing agencies
- CD manufacturers
- Distributors
- Public relations agencies
- Sponsors

While the study's objective is to identify opportunities for Canadian independent companies (Can Opp), it is necessary to focus on the Peruvian independent circuit and the opportunities for English-language music to enter the market. In section 3 the study identifies the key promoters and producers of international scenes, both mainstream and independent, who program English-speaking artists, as well as electronic DJs/producers.

The international live acts can be typified as small, medium, big or giant sizes (see section 2 for more detail). How successful and profitable they are depends on the specific kind of music that they are presenting, their relationship with local promoters and their strategies for engaging with audiences. Currently, the live shows of international acts are usually promoted through radio airplay, not as musical content but as paid advertisements or sponsorship from the radio corporation that owns the station. This means that music from independent labels is often not represented, but this has not stopped the evolution of the independent music circuits.

**“The embargo on foreign goods fed the blossoming cassette piracy market, a cornerstone of popular culture. With the mass use of CDs and the possibility of domestic copies, the piracy market increased to comprise an estimated 97% of the phonographic market.”**

The study has identified five main types of shows. The identifications also show the dynamics of the players in the general music ecosystem through live acts:

1. Artist self management: The bands and artists are dedicated to the production of their own shows.  
*Opportunities for Canadian Independent Companies (CICs): The bands and artists are willing to welcome and exchange with foreign music proposals.*
2. Mid-size shows and party producers: The music industry has seen the emergence of self-taught producers of shows and parties. This is currently a vibrant economic activity in the independent scene. (see section 3)  
*Opportunities for Canadian Independent Companies (CICs): The producers work with DJs, and their audiences are open to new artists in their preferred genres.*
3. International shows: There are a few irregular producers who sporadically organize shows for niche artists. Others, more consistently active producers, continuously organize shows on an almost monthly or bimonthly basis (see section 3).  
*Opportunities for Canadian Independent Companies (CICs): There has been presence of Canadian bands such as Comeback Kid in hardcore shows, and DJs such Caribou enjoy a healthy amount of booking requests.*
4. Local Festivals: With the big local shows and an international flow of artists, the new Peruvian festivals operate to serve two agendas: that of the alternative scene and that of mainstream pop.  
*Opportunities for Canadian Independent Companies (CICs): The foreign bands that play these festivals are those with established Peruvian audiences or those who can cover their travel expenses.*
5. Government initiatives: Some governments at regional, city and district levels organize live shows in public spaces in coordination with the community and the “Puntos de Cultura” system, an initiative of the Ministry of Culture. They may also coordinate events with the cultural centers of nations, such as Spain’s Centro Cultural de España, Germany’s Goethe Institut and France’s Alianza Francesa.  
*Opportunities for Canadian Independent Companies (CICs): A primary opportunity for an organized experience is to work with embassies and local*

*governments.*

### 1.3 Trade conferences and industry events

The market industry in Peru is still small, but there are agents actively championing its development. This is mainly led by PROMPERÚ, the entity responsible for designing and developing the country’s brand and tourist strategy, although it has a way to go before it reaches its expectations. PROMPERÚ occasionally funds plane tickets for bands to attend international festivals or markets.

In addition to this, Peru participates in the MICSUR, Mercado de Industrias Culturales del Sur (“South Cultural Industries Market”). The Ministry of Culture leads the participation of Peruvian agents in MICSUR. In contrast, the Peruvian participation in music markets such as SXSW, WOMEX or MIDEM is commonly managed and paid for by the attending artists or organizations. For examples include Cernicalos Producciones and Selvamonos in WOMEX; Tourista, La Inédita and GAIA in SXSW; and FILMTRAX in MIDEM.

The music does not have a defined position in the official politics of the nation, instead crossing different institutions. Within the Ministry of Culture, these are the Dirección General de Artes, la Dirección de Artes, la Dirección del Audiovisual la Fonografía y los Nuevos Medios, la Dirección de Pueblos Afroperuanos and la Dirección de Patrimonio Cultural Inmaterial. Beyond the Ministry of Culture, these also include PROMPERÚ, PRODUCE, the Congress and several local governments. However, there are no assigned funds within the national budget to specifically assist music organizations.

**“The market industry in Peru is still small, but there are agents actively championing its development. This is mainly led by PROMPERÚ, the entity responsible for designing and developing the country’s brand and tourist strategy.”**

## 2. RECORDED MARKET

### 2.1 Sales

The recorded market is strongly divided between piracy and legal phonographic productions. According to Phantom Music Stores, a Peruvian artist's title sells 200 units of original copies in a period of 5 years. Even the mainstream artists prefer to deliver their work directly to pirate sellers to distribute. This way, the artist reaches selling points that they could not otherwise reach.

There is only one local CD factory, CD Perú, although there are two other factory offices: Xendra Music, a company that makes the CDs in Colombia, and Lazer Disc, who manufacture their CDs in Argentina. The pirates have CD factories in clandestine facilities.

The minimum production is 500 copies, which is commonly the most required by local bands. The next shipment size up requires 1000 copies. When an artist sells over 5,000 copies, it achieves 'gold' status in the Peruvian market.

With the rise of streaming services, CD sales have fallen. According to Ivan Cock, former manager of pop artists Gianmarco and long time music businessman, previous album sales for artists sold around 20,000 copies. Today, if an album is available to stream, CDs will sell around 5,000 copies.

Both independent and mainstream artists create CDs through the above-mentioned factories, but tropical music and huayno music artists are more likely to conduct business directly through pirates for both promotional and distribution purposes.

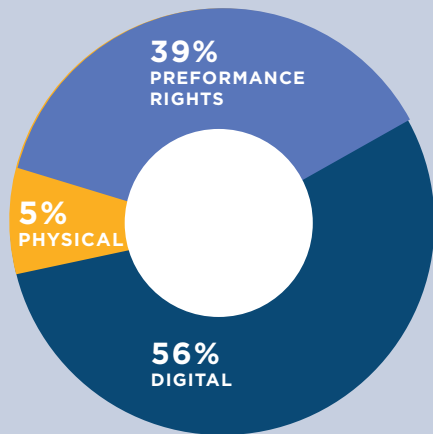
While physical sales are limited (5% of recorded music revenues in 2015), digital music revenue has increased considerably in the last 3 years (see graphs below). Digital revenue in Peru increased 149% in 2013 and 96.5% in 2014. According to Peruvian promoter Jose Velasquez (CEO of Veltrac Music), to some extent, this sharp increase is explained by the fact that the digital music market was underdeveloped before 2012. Post-2012, it can be attributed to the emergence of ad-supported streaming and online download stores. This trend places Peru at the top of Latin American countries for digital music market growth. Ad-supported streaming accounted for US\$ 2.61 million in 2015, and that subscription grew from US\$ 0.74 million in 2014 to US\$ 1.76 million in 2015. This trend is motivated by the growth of internet connectivity in the country. In that sense, it is estimated that the number of smartphone users in Peru is 6,391,000. Official data shows that 54.5% of mobile users own a smartphone.

**“The recorded market is strongly divided between piracy and legal phonographic productions. Even the mainstream artists prefer to deliver their work directly to pirate sellers to distribute. This way, the artist reaches selling points that they could not otherwise reach.”**

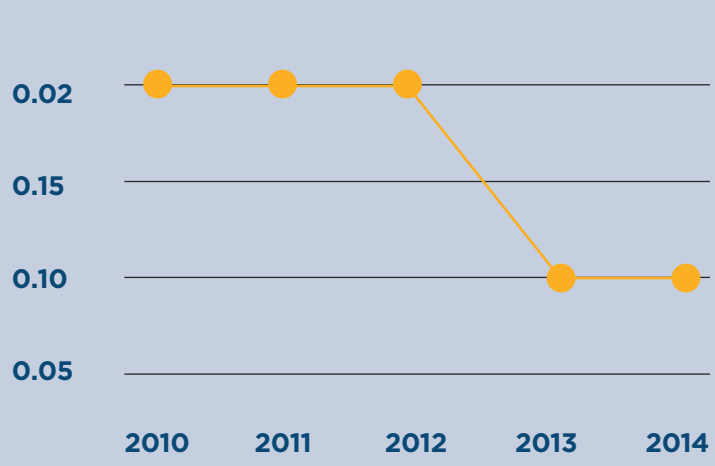
	Original CD	Pirated CDs
Production cost	From S/.10 to S/.35	From S/.0.30 to S/.2.50
Selling price	From S/.27 to S/.70	From S/.1 to S/.7
Selling points	Stores	Streets and markets

Table 1: Original vs Pirated CDs, Single unit comparative

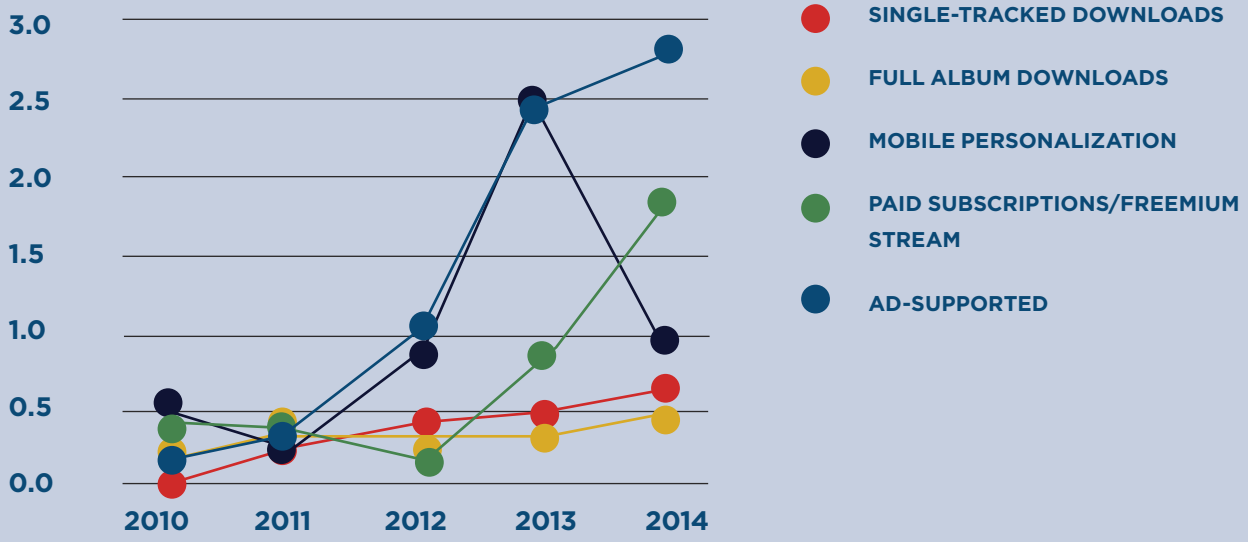
**RECORDED MUSIC REVENUES BY SECTOR 2015 (% OF TRADE VALUE)**



**RECORDED MUSIC SALES (VOLUME, MILLION UNITS)**



**DIGITAL MUSIC REVENUE (VOLUME, MILLION UNITS)**



Graph 1: Recorded Music Revenues and Sales in Peru  
Source: Musically (2016), IFPI (2015) and (2016)



**“Use of Internet in Peru has increased during the last decade. Currently, 42% of the population uses the Internet, with the average higher in urban areas. Despite this, the most lucrative activity for local musicians is still live performance.”**

Use of Internet in Peru has increased during the last decade. Currently, 42% of the population uses the Internet, with the average higher in urban areas. Despite this, the most lucrative activity for local musicians is still live performance. This is because the audience is reluctant to purchase original music online, and the fight against piracy is ineffective. Nonetheless, the increasing use of Internet and social networks in Peru, like Facebook, Twitter and Instagram, has allowed artists, music workers and audiences to connect and relate.

Most of the economic activity of both mainstream and independent music markets takes place in Lima. This is unsurprising, as Lima accounts for almost a third of the country's 31 million-strong population, registering 9,834,631 residents. In relation to the international mainstream and independent scenes, the rest of the cities in Peru commonly follow the trends set in the capital.

The music business in Lima can be distinguished by two main circuits: Lima's downtown circuit and the Barranco-Miraflores's circuit. A mainstream scene and an independent scene compose both circuits. The mainstream scene is mostly based on the consumption of cumbia, reggaeton and Latin pop genres, while the independent scene has a wider scope of genres, as mentioned in Chapter 1.

The main organizational unit for music production is the artist or band. The independent label or other associated music services are part of the developing process. Currently, the artist or band completes each stage of their chain value chain with the relevant agent of the music ecosystem: the independent labels focus on CD distribution, and there are some new agents taking the task of booking shows and new organizations dedicated to licensing music (see section 5.5 for more detail). Many of the professional musicians have their own recording studios for rent, which can become a primary income stream.

Although vinyl sales have increased during the last few years,

the CD is still the primary physical music format. However, the common consumer only uses the CD as a means of adding music to their computers, mobile phones or USBs.

The study has identified the following agents in the chain of production and record sales (in physical format – discs):

1. Artists (Self-released): Artists and bands fund the fabrication of their own phonographic productions.  
*Opportunities for Canadian Independent Companies (CICs): There is a need for smaller orders of original CDs, from 100 to 300 copies.*
2. Independent labels: Labels which produce multiple copies in factories or CD-R copies of artists' recordings. Independent labels can also take part in financing, mixing and mastering or even distributing the recording.  
*Opportunities for Canadian Independent Companies (CICs): CICs could focus on their relationship with the independent Peruvian labels.*
3. Music stores in malls and department stores: Although they are few, these remain the only legal way of finding music on physical formats. They sell edited discs by the major label acts as well as smaller supplies of material from local bands.  
*Opportunities for Canadian Independent Companies (CICs): The stores can be the channel to reach the audiences that do not have the habit of attending independent live shows or parties.*
4. Distributors: Artists and bands pay for the fabrication of their discs and distribute them. There are no major distribution companies in Peru. The most prominent one, however, is 11 y 6 Discos, who distribute in supermarkets and music stores. The company is part of the same group as the CD Perú factory.  
*Opportunities for Canadian Independent Companies (CICs): CICs can engage with distribution companies in order to evaluate possibilities of promotion.*  
11 Y 6 Discos web: <http://grupo11y6.pe/>
5. Independent record fairs: There are three independent record fairs that gather between 30 and 50 independent labels representing various genres, as well as small fairs and/or stands at live shows.  
*Opportunities for Canadian Independent Companies (CICs): Engage with local independent record fairs in*

## 2. RECORDED MARKET *Opportunities for Canadian Independent Music Companies in the Peruvian Market*

*order to build international interchanges.*

Feria de Sellos Independientes of San Isidro's Municipality at Cultura Libre Festival (usually in May).

**Contact:** [talia.vega@munisanisidro.gob.pe](mailto:talia.vega@munisanisidro.gob.pe)

Feria de Sellos Independientes: Espacio Fundación Telefónica in July and December.

**Contact:** [omar.lavalle@telefonica.com](mailto:omar.lavalle@telefonica.com)

Feria Turbulenta, organized by Necio Records.

**Contact:** Web: <https://www.facebook.com/neciorecords/>

There is a lack of data concerning independent record label sales. However, it is possible to provide some references based on the remarks of music industry actors. According to Alonso

García Herbozo, owner of Anti Rudo Records, sales for the band Tourist hit 300 copies in 4 months for the first edition. They have released a second edition of 400 copies, which has sold 50 copies in 2 months.

As a means to estimate the average sale rate at local independent fairs, the study analyses the sales records of El Grito, a store dedicated exclusively to selling Peruvian records. The store was launched in Galerías Brasil before opening a new store downtown and, more recently, in Villa El Salvador in south Lima. The following data shows the top 10 records sold between November 2015 and June 2016 (CDs):

Band / Artist	Record	Copies Sold	Label
Cuchillazo	Recaer	138	Descabellado / Cósmica!
Olaya Sound System	¿Quién es quién?	102	Descabellado / Cósmica!
Difonia	La Bestia	73	Released by the band
Rafo Ruez y Los Paranoia	Lucia	71	Cósmica! and the artist
La Mente	Música	65	Descabellado
Laguna Pai	Resiliencia	64	Released by the band
Del Pueblo del Barrio	Maestros	36	Released by the band
Difonia	Tarde o Temprano	34	Released by the band
Mar de Copas	Seis	32	Released by the band
Cuchillazo	Destruir todo de Nuevo	28	Descabellado / Cósmica!

Table 2: Sale records from November 2015 to June 2016 Source: El Grito Stores

### 2.2 Retail

The main retailers for physical sales are the following:

**Newsagents (Newspapers kiosks):** These are local spots where newspapers are distributed on a neighbourhood-level scale. Disc factories place their products here at a price fluctuating between S/.10 and S/.30.

**Supermarkets:** There are two main selling spots in supermarkets. Discs can either be located right next to the checkout point or in a strategic spot inside the store. For example, Phantom Music Store has worked in association with Punto Ticket (an events ticket retailer located in supermarkets) to sell part of their music catalogue in their stands. Those products are mainly compilations of popular music genres or discs of proven sale capacity (mainstream artists).

**Music Stores:** As a strategic response to piracy, many of the traditional music stores opened in malls, although there are a few located along commercial roads. Their prices can vary between S/.27.70 and S/.200 and their catalogues are mainly composed of major-label artists.

Music Stores in Peru

#### **Phantom Store**

Web: <http://phantom.com.pe/magfinal/tiendas>

#### **Via Music**

Tel.: (511) 243-0668

Email: [info@viamusic.com.pe](mailto:info@viamusic.com.pe)

#### **Two Music Store**

Tel.: (511) 445-9382 or (511) 242-3302

Email: [cesar@twomusic.com.pe](mailto:cesar@twomusic.com.pe)

#### **Sonocentro**

Tel.: (511) 485-0999 or (511) 566-3615

Web: <http://sonocentro.galeon.com/index.html>

#### **Ciudad Disco**

Tel.: (511) 658-6120

Email: [ciudadisco@outlook.com](mailto:ciudadisco@outlook.com)

Address: Jr. José Gálvez 435, tienda 253.

**Stores in market fairs:** Local markets such as Polvos Rosados or Polvos Azules contain stands where small

distributors sell music products for a specialized audience. Now, many of them are importing exclusive records according to public demand.

**Roadside stands:** Many of the discs on these stands are illegal copies sold at a low cost. Prices are between S/. 0.50 and S/. 3.50. The stands are usually located outside of local markets and in high-traffic places. There are also street sellers on foot operating along main avenues and in food markets.

**Clothing, art and accessories stores:** Some clothing, art and design stores, such as Puna, Dédalo and La Pulga, sell CDs from local and international bands. The type of music sold at those stores coordinates with the demographic of customers their style and fashion appeals to.

#### **Puna**

Email: [Yerko Zlatar \(yerkozlatar@gmail.com\)](mailto:Yerko.Zlatar@gmail.com)

Web: <http://www.puna.com.pe/puna-tienda/>

#### **Dedalo**

Tel.: (511) 01 652 54 00

Web: <http://www.dedalo.pe/>

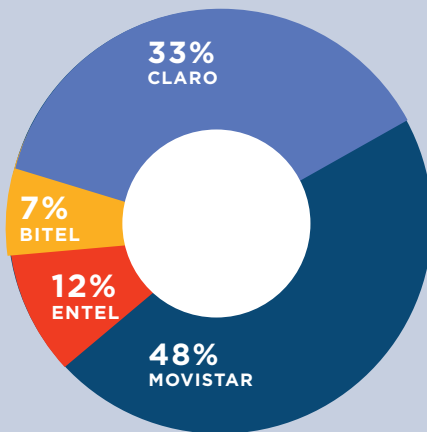
#### **La Pulga**

Email: [pulgalatienda@yahoo.com](mailto:pulgalatienda@yahoo.com)

### 2.3 Mobile

In Peru, there are four mobile phone providers, and all of them are linked to the music industry in varying degrees: Movistar, Claro, Entel and Bitel. Movistar is the most important provider for the market in terms of the segment it controls, followed by Claro, Entel and Bitel (see graph below). Movistar, Claro and Entel usually sponsor the concerts of mainstream international artists in Peru. During the last year (2016), there has been a growing trend among mobile phone providers' brand engagement strategy for the promotion and sponsorship of the emerging Peruvian independent scene.

## GRAPH 2: DISTRIBUTION OF MOBILE PHONE MARKET



Graph 2: Distribution of mobile phone market  
Source: El Comercio (2016)

### Entel

Entel, in association with Samsung, has developed a music platform called Entel Music (<http://www.entelmusic.pe/>). The platform promotes the concerts of the international artists that Entel sponsors. For instance, the platform advertised an Aerosmith concert that took place in Lima in October 2016. Entel was also the sponsor of the first ever Rolling Stones concert in Peru in 2016. Entel Music also acts as a listing platform for Lima's main gigs, advertising a balanced mix of mainstream gigs by international artists and shows by independent Peruvian artists. Through news and articles, the web page promotes new Peruvian independent artists, providing relevant information about them and their upcoming shows. Currently, Entel has a promotion that provides a 6-month free trial of Google Play Music to customers who have purchased Samsung smartphones.

### Movistar

In August 2016, Movistar launched a music platform called Movistar Música (<https://goo.gl/koAibF>). It has two features: a music app for cell phones (Movistar Music)

and a cable television channel (Movistar Música). Both initiatives are focused on the promotion of emerging Peruvian artists.

The Movistar Música app is free to download and access, through Android- and iOS-supported phones. It provides news about the Peruvian independent music scene and allows users to stream the TV cable channel (Movistar Música). Currently, Movistar does not charge any fee for the consumption of data while using the app (this promotion runs until the 31st of December).

The cable TV channel (Movistar Música) has over 26 programmes focused on the promotion of emerging independent Peruvian artists. It presents live concerts by Peruvian artists and bands. The production of the programmes is entirely run by local companies. Media Networks is the company in charge of Movistar Música's production.

### Claro

In August 2016, Claro launched a music platform called Claro Musica ([www.claromusica.com](http://www.claromusica.com)). It is accessible through both desktop and mobile platforms (not just for Claro customers) and allows users the option to stream or download, both features which require a subscription. The price to download a song is S/. 2.90 (1,12 CAD). To stream, users pay S/19.20 (7,44 CAD) per month. The platform is mostly focused on promoting international mainstream artists. Its catalogue contains over 17 million songs.

Claro also sponsors concerts by mainstream international artists and electronic music events. Additionally, Claro runs a contest in association with Sony Music, called Claro Festival, where select local emerging artists compete in order to obtain a contract with Sony Music. The contract includes the recording of a debut record, as well as promotional and financial support for one year.

### Bitel

In 2014, Bitel launched a product called "DalePlay" (<http://www.daleplay.com.pe/>), which is a web platform and app mostly focused on promoting emerging independent Peruvian artists. However, the app also contains music by mainstream international artists signed to Sony Music and Universal Music. The app allows the free streaming of songs and videoclips (mobile app and

online) from a catalogue containing 76 Peruvian artists. Downloading is only available via the app and each song costs S/. 2.50 (0.97 CAD \$).

### 2.4 Streaming and online download

Many streaming services are introducing their services in Peru, although to date there is not an active use of paid streaming services. Spotify has developed some initiatives to engage the Peruvian listeners by offering initial subscriptions at S/1 for one month, even extending this deal to last for the duration of a three month trial. They have also launched a Peruvian Facebook page presenting local artists to users. This strategy has boosted streaming figures and Facebook 'likes' for the featured bands. Currently, the cost of the Spotify's monthly subscription is S/16.90. Deezer has also released a promotion, offering six premium+ accounts for S/.23.85 per month, when the single price is S/17 monthly.

The four main aggregator services used in the Peruvian music market for streaming and digital distribution services are: CD Baby, Tunecore, Bquate and Altafonte. Two of those companies have offices in Peru: Altafonte, which is headquartered in Spain and works with labels or managers; and Bquate, a Peruvian startup which won the Start Up Peru competition with its first edition and has been incubated by Wayra, Movistar's business incubator.

#### **Altafonte Peru**

**Contact:** Camilo Vega, Label Manager Peru (camilo.vega@altafonte.com)

#### **Bquate**

**Contact:** Yolanda Avalos, Founder (yoly@bquate.com)

According to Altafonte, Spotify is the most commonly-used streaming platform in Peru, followed by iTunes, Apple Music and, finally, Claro Music and Deezer.

**Apple music: SUBSCRIPTION**

**Claro Musica: DOWNLOAD, SUBSCRIPTION**

**Deezer: SUBSCRIPTION, AD-SUPPORTED**

**Entel: DOWNLOAD, SUBSCRIPTION**

**Google Play Music: —**

**itunes: DOWNLOAD**

**Movistar: DOWNLOAD**

**Napster: SUBSCRIPTION**

**Tidal: SUBSCRIPTION**

**Youtube: AD-SUPPORTED**

**Spotify: AD-SUPPORTED**

*Table 3: Online music services available in Peru*

### 2.5 Physical and digital distribution

Of the most common distributors, Warner, Universal and Sony Music all currently have representation in Peru for physical distribution, but the Orchard and Believe do not. Altafonte works - for now - only as a digital music and video distributor. Phantom Music Store, the main formal music store chain in the country, leads the distributions of CDs and vinyl. There are a few other small music stores, such as Music City and Sonocentro, located inside shopping malls, as well as spaces selling original CDs and vinyl inside local market fairs, such as Galerías Brasil in the Jesús María district and Polvos Rosados in Surco district.

### 2.6 Industry players (labels and publishers)

One of the main issues in the Peruvian music market is the lack of connection between the different parts of the value chain. Usually, each artist or art collective develops their own circuits. In that sense, there is a lack of distribution companies to service the emerging market and independent musicians. Labels produce their own material and manage to distribute it independently. For example, Tourista, one of the most prominent independent bands emerging in the last 4 years, sells their discs through Anti Rudo Records. Rui Pereira, the

band leader, declared that the income generated from discs sales is not a considerable amount (a maximum income of S/. 500 per month). According to Pereira, the band sees the production of discs mainly as a promotional activity, and a big portion of the stock is given as a gift to fans or promoters. The band has other sources of income, such as sponsorships, live shows and digital revenue.

### INDEPENDENT LABELS

The ecosystem of music labels is wide and varied. Focusing on the opportunities for CICs, it is important to highlight that the label Plastilina Records releases international artists for both Peruvian and international markets. They have connections with distributors in Europe, USA, Brazil and Argentina. The following is a list of the independent labels in the Peruvian music industry:

**Label:** Acido Producciones

**Genre:** rock punk / metal

**Contact:** [xariamusic.oficina@gmail.com](mailto:xariamusic.oficina@gmail.com)

**Label:** Actitu Records

**Genre:** low fi / rock / folk

**Contact:** [amadeog77@gmail.com](mailto:amadeog77@gmail.com)

**Label:** Agustinazo

**Genre:** multigenre

**Contact:** [marciosf175@gmail.com](mailto:marciosf175@gmail.com)

**Label:** Anti Rudo Records

**Genre:** post rock / post hardcore / dance rock.

**Contact:** [alonsog454@gmail.com](mailto:alonsog454@gmail.com)

**Label:** Automatic Entertainment

**Genre:** shoegaze

**Contact:** [info@automatic.com.pe](mailto:info@automatic.com.pe)

**Label:** Atutiplen Records

**Genre:** contemporary rock

**Contact:** [alonsog454@gmail.com](mailto:alonsog454@gmail.com)

**Label:** Buh Records

**Genre:** experimental / noise / avant garde

**Contact:** [unautobus@gmail.com](mailto:unautobus@gmail.com)

**Label:** Cal Comunicaciones

**Genre:** pop

**Contact:** [comunicacionescal@gmail.com](mailto:comunicacionescal@gmail.com)

**Label:** Cabina Libre

**Genre:** contemporary folklore

**Contact:** [queque@cabinalibre.com](mailto:queque@cabinalibre.com)

**Label:** Cernícalo Producciones

**Genre:** world music

**Contact:** [pepita@cernicalo.com](mailto:pepita@cernicalo.com)

**Label:** Contraorden Discos

**Genre:** hardcore

**Contact:** [Contraordendiscos@hotmail.com](mailto:Contraordendiscos@hotmail.com)

**Label:** Cosmica!

**Genre:** punk / fusión / rock

**Contact:** [espopmama@gmail.com](mailto:espopmama@gmail.com)

**Label:** Cuaderno Roto

**Genre:** punk / noise / progressive

**Contact:** [cuadernorotohp@gmail.com](mailto:cuadernorotohp@gmail.com)

**Label:** Colectivo Descabellado

**Genre:** fusion / rock / reggae

**Contact:** [estudiodescabellado@gmail.com](mailto:estudiodescabellado@gmail.com)

**Label:** Discos Invisibles

**Genre:** avant garde noise

**Contact:** [discosinvisibles@hotmail.com](mailto:discosinvisibles@hotmail.com)

**Label:** Doom Record

**Genre:** doom / stoner

**Contact:** [doomrecs@live.com](mailto:doomrecs@live.com)

**Label:** Dorog Records

**Genre:** experimental

**Contact:** [dorogrecs@yahoo.com](mailto:dorogrecs@yahoo.com)

**Label:** Espiritus Inmundos

**Genre:** metal

**Contact:** [espiritusinmundos@yahoo.com](mailto:espiritusinmundos@yahoo.com)

**Label:** Faro Discos

**Genre:** indie rock / post punk revival

**Contact:** [farodiscos@gmail.com](mailto:farodiscos@gmail.com)

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## 2. RECORDED MARKET *Opportunities for Canadian Independent Music Companies in the Peruvian Market*

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**Label:** Identidad Records

**Genre:** punk / hardcore

**Contact:** [japideis@gmail.com](mailto:japideis@gmail.com)

**Label:** Infopesa

**Genre:** Psychedelic Cumbia

**Contact:** [infopesa@infopesa.com](mailto:infopesa@infopesa.com)

**Label:** Infravox Record

**Genre:** synth pop

**Contact:** [administracion@infravoxrecords.com](mailto:administracion@infravoxrecords.com)

**Label:** Inti Record

**Genre:** doom / metal / stoner

**Contact:** [intirecords.peru@gmail.com](mailto:intirecords.peru@gmail.com)

**Label:** La Flor Records

**Genre:** post hardcore

**Contact:** [phaveheart@gmail.com](mailto:phaveheart@gmail.com)

**Label:** Magnetic Fever Records

**Genre:** post hardcore

**Contact:** [angelricardomaurtualudena@gmail.com](mailto:angelricardomaurtualudena@gmail.com)

**Label:** Mixtura

**Genre:** rock

**Contact:** [programamixtura@yahoo.es](mailto:programamixtura@yahoo.es)

**Label:** Mundano Records

**Genre:** melodic punk / hardcore

**Contact:** [gonz67@hotmail.com](mailto:gonz67@hotmail.com)

**Label:** Nave Nodriza

**Genre:** rock

**Contact:** [vcosmicos@gmail.com](mailto:vcosmicos@gmail.com)

**Label:** Necio Records

**Genre:** progressive

**Contact:** [arturoaqv1987@gmail.com](mailto:arturoaqv1987@gmail.com)

**Label:** Noxa Records

**Genre:** experimental noise / electronic

**Contact:** [noxarecs@gmail.com](mailto:noxarecs@gmail.com)

**Label:** On Off Entertainment

**Genre:** pop

**Contact:** [offonentertainment@gmail.com](mailto:offonentertainment@gmail.com)

**Label:** Ogro Records

**Genre:** pop

**Contact:** [marcos@reinoermitano.com](mailto:marcos@reinoermitano.com)

**Label:** Ogro Records

**Genre:** doom / stoner

**Contact:** [marcos@reinoermitano.com](mailto:marcos@reinoermitano.com)

**Label:** Plastilina Records

**Genre:** indie pop

**Contact:** [jal@plastilinarecords.com](mailto:jal@plastilinarecords.com)

**Label:** Play Music

**Genre:** national multigenre

**Contact:** [mailbox@playmusicv.com](mailto:mailbox@playmusicv.com)

**Label:** Penzion Producciones

**Genre:** folk / rock / rap / fusion

**Contact:** [sebas@penzionproducciones.com](mailto:sebas@penzionproducciones.com)

**Label:** Repsychled Records

**Genre:** 60s oldies

**Contact:** [andrukis@yahoo.com](mailto:andrukis@yahoo.com)

**Label:** Selvámonos Producciones

**Genre:** tropical bass / fusion

**Contact:** [lionel@selvamonosprod.org](mailto:lionel@selvamonosprod.org)

**Label:** Sonidos Latentes Producciones

**Genre:** rock

**Contact:** [sonidoslatentes@live.com](mailto:sonidoslatentes@live.com)

**Label:** Superspace Records

**Genre:** avant garde noise

**Contact:** [polyluna@gmail.com](mailto:polyluna@gmail.com)

**Label:** Surrounding Label

**Genre:** electronic / ambient

**Contact:** [diego@surroundinglabel.com](mailto:diego@surroundinglabel.com)

**Label:** Sucio Réconds

**Genre:** Multigenre (Arequipa city)

**Contact:** [suciedad@hotmail.com](mailto:suciedad@hotmail.com)

**Label:** Tóxico Producciones

**Genre:** metal and progressive

**Contact:** [toxiko.producciones@gmail.com](mailto:toxiko.producciones@gmail.com)

**Label:** Trilce Discos  
**Genre:** post punk  
**Contact:** [trilce\\_discos@hotmail.com](mailto:trilce_discos@hotmail.com)

**Label:** Underpop  
**Genre:** rock  
**Contact:** [poprockenperu@gmail.com](mailto:poprockenperu@gmail.com)

**Label:** Urbanoide  
**Genre:** fusión  
**Contact:** [revistafreakout@yahoo.es](mailto:revistafreakout@yahoo.es)

### 2.7 Trends

#### Centralism

The national music agenda is set by Lima's radio stations and music promoters. In the remaining cities, there is a strong presence of local artists performing vernacular music. Some cities, such as Huancayo, Cusco and Arequipa, have smaller independent scenes.

#### General information:

<https://www.facebook.com/RockAchorao>

#### Arequipa producers:

<https://www.facebook.com/sonora.agencia/>

#### Cusco producers:

<https://www.facebook.com/PZProducciones/>

#### Trujillo producers:

<https://www.facebook.com/ZumoColaboratorioCultural/>

#### Huancayo producers:

<https://www.facebook.com/HuancayoIncontestable>

#### Reconfiguration of the national identity

In recent years, upper social classes, left-wing middle class youth and students of private universities have developed an appreciation for and celebration of local identity. The Peruvian coolness of the "chicha" culture, linked to the migrants, the traditions of the provinces and new historical approaches, boosted a phenomenon that favoured the emergence of tropical bass, cumbia and Afro-Peruvian fusions. It has contributed to increased sales on the accompanying labels. The main independent artists representative of this movement are listed here:

#### Dengue Dengue Dengue:

<https://www.facebook.com/denguedenguedengue/>

#### Animal Chuki:

<https://www.facebook.com/AnimalChuki/>

#### Terror Negro Label:

<https://www.facebook.com/terrornegrorecords/>

#### Elegante y La Imperial:

<https://www.facebook.com/eleganteylaimperial/> Los

#### Guayabera Sucia:

<https://www.facebook.com/losguayaberasucia/Olaya>

#### Sound System:

<https://www.facebook.com/olayasoundsystem/>

#### Bareto:

<https://www.facebook.com/bareto/>

#### Cumbia All Stars:

<https://www.facebook.com/CumbiaAllStars/>

#### Novalima:

<https://www.facebook.com/novalima.official/>

#### El Polen:

<https://www.facebook.com/EL-POLEN-52689033634/>

#### La Sarita:

<https://www.facebook.com/elrockdelnuevoperu/>

#### Hip-Hop and rap music

Hip-hop and rap music have a strong cultural following in Peru. The periphery of the capital has been the ideal ground to develop audiences and musicians that follow hip-hop in five elements: DJs, MCs, break dance, graffiti and knowledge. There are also some trends inside the heterogeneous movement, such as rap made by women, street- and gangster-oriented lyrics and political and critical approaches with social activism.

#### Rapper School (group):

<https://www.facebook.com/promocionlunatika/>

#### Comité Pokofló (group):

<https://www.facebook.com/ComitePokoflo/>

#### El Paisa (artist):

<https://www.facebook.com/El-Paisa-Oficial-219065171469149/>

#### Fokin Clan (band):

<https://www.facebook.com/ELFOKINCLAN/>

#### Callao Cartel (band):

<https://www.facebook.com/CallaoCartel/>

#### Inkas Mob (band):

<https://www.facebook.com/inkasmob/>



### **Vinyl**

In keeping with the greater global trend, the distribution of vinyl records is rising thanks to the value and demand of the physical experience. Local vinyl collector clubs have blossomed on Facebook, and the celebrated Record Store Day, which has celebrations in Peru, is vinyl-oriented. In scale with the Peruvian market, there is a small vinyl market in the country.

#### **Vinyl Collectors Perú:**

<https://www.facebook.com/VinylCollectorsPeru/>

### **Video Live Sessions**

There are several audiovisual producers that maintain their own live session channels on Youtube. Some examples include :

#### **Playlitz:**

<http://playlitz.pe/>

#### **Balcony TV Lima:**

<https://www.facebook.com/BalconyTVLima/>

#### **La Caja:**

<https://www.facebook.com/lacajaweb/>

#### **Escarabajo Sesiones:**

<https://www.facebook.com/EscarabajoSesiones/>

#### **Kinoa:**

<https://www.facebook.com/kinoavideoritual/>

#### **Triciclo:**

<https://www.facebook.com/monopelao.producciones/>

#### **Chico del Pórtico**

<https://www.facebook.com/tienemiedodedejarlo/>

#### **Barrio Beat:**

<https://www.facebook.com/barriobeat.pe/>

#### **MIDI:**

<https://www.facebook.com/midi.oficial/>

### **TV presence**

In 2016, two new television channels were created, Canal IPE and Movistar Música. They are oriented to promote local artists who play transnational music genres.

#### **Movistar Música:**

<http://www.movistar.com.pe/movistar-musica>

#### **Canal IPE:**

<http://www.canalipe.tv/>

### **Festivals**

The use of the term “festival” in Peru could be misunderstood. There are a lot of activities operating under that name, but there are only a few that are festivals in the traditional sense, rather than a massive live music show. Both independent festivals and pop-rock, radio oriented festivals are increasingly popular. Peru’s festival culture is elaborated on in Chapter 3.

### **Parties**

There is a strong trend among audiences, to not go to “a show” but rather a “party experience with live music”. This has allowed some dance-oriented artists and promoters to establish their own party brands, attracting bigger audiences than music-only events would have.

### **Internet**

The mass adoption of the Internet transformed relationships and production methods all around the world. In Peru, it encouraged the sustainability of local practice for transnational music scenes outside the media, allowing creators and consumers to connect on a more immediate and direct basis. The Internet opened up global access to niche markets.

### **Target market development**

Audiences are reached by appealing to the lifestyle trends associated with each specific music scene. For example, Veltrac and Headsouth (mentioned in Chapter 3), are associated with brands such as Converse, Puma and Adidas Original. This allows the small and mid-sized shows to garner regular attendance and even grow to become big shows during prime festival season.

### **Mastering**

The more popular independent bands send their recordings abroad to be mastered in accordance with international sound standards. This a strong business opportunity within the Peruvian music ecosystem for Canadian independent companies.

**Lagun Pai:**

<http://lagunapai.com/>

**Wolves As Friends:**

<http://wolvesasfriends.com/>

**Vieja Skina:**

<https://www.facebook.com/ViejaSkinaOficial/>

**Alejandro y María Laura:**

<https://www.facebook.com/alejandroymarialaura/>

### 2.8 Strategies

There are several operational strategies used by independent players in the Peruvian music industry:

**Do it yourself (DIY)**

The Andean culture's methods of production and the DIY practices of the transnational underground collide to create the current practice of independent music circuits in Lima and greater Peru. The artists themselves are becoming managers, promoters, producers, bookers, journalists and cultural industries specialists. In academic circles, this trend is commonly referred to as "the professionalization of the DIY ways". International music offer has to realize that this is one of the principal aspects of the Peruvian music market; there are no implemented public or corporate conditions for music. What the local ecosystem has is the result of the achievement of the market's independent players.

**Social capital**

All the music scenes in the market structure have their own ways of applying Andean customs. The social capital strategy refers to the use of social capital for the management of parallel production cycles (the use of relatives, friends, neighbours, etc). The jobs in the value chain are performed by the people within the artists' networks as trust circles for production. To enter the Peruvian music industry, it is necessary to enquire into accessing the music scenes most likely to be receptive to the specific proposal.

**Sponsorship and strategic alliances**

As is common globally, the investment of brands in terms of organisation, promotion and communication depends

on the network of contacts and the amount of 'likes' or 'followers' an artist has on social media. Brands with similar target audiences use these resources to make advertisement deals, such as promoting each other's events.

**Social networks and press**

There is a strong relationship between social media and traditional media. There are audiences outside the reach of the artist's network that are informed by the traditional media (TV and newspapers), but many fans engage through the social networking activities of their favourite artists. In that sense, what happens along the routes of traditional media must reach the social networks in order to magnify its reach among the target market of each music scene.

**Graphic distinction**

In Peru, the quality of an event or product's graphic design is often directly correlated to the quality of the event itself. The audience's music perception is strongly led by both the graphic promotion of a show and the visual register of the event itself.

### 2.9 Recorded market opportunities for Canadian artists

The music industry in Peru is mainly focused on promoting local emerging artists. The profit generated from selling records is low due to ongoing piracy activity, which has hindered the engagement of important agents in the sector. Piracy is a common practice in the country, and the sales of music in physical formats are a only small part of the market (3%). However, the emergence of aggregators such as BQuate as a response to the introduction of streaming services has enhanced the recording industry. Although the main profit generator for Peruvian artists is still live performance, artists are seeing an increase in profits from streaming services.

Keeping this in mind, a good opportunity for foreign companies is to get involved in mastering services, as the Peruvian industry lacks appropriate mastering studios. Commonly, local records are mastered abroad. Peru has many experienced sound engineers, educated both

locally and abroad, but the opportunities for them to work domestically are limited. Canadian independent business strategies could incorporate networking with Peruvian recording artists in order to provide mastering services or to evaluate the possibilities for creating mastering studios in the country.

In addition, the aspired enhancement of the local music industry presents opportunities for the digital and physical distribution of local records at national, regional and international levels. Currently, Peruvian independent records are being networked regionally, with Colombia noted as an important link. Local records can have a regional impact around Latin America, but this trend is still in the early stages. Canadian independent companies have an opportunity to extend the impact of the regional dynamics of music exchange to a wider scope.

For example, some local electronic and global bass records have more potential than others on a foreign market due to their characteristic of being instrumental (without vocals), which overcomes the limitation of language. However, many global bass genres are being fused, initially motivated regionally by international records such as the Argentinian ZZK (Zizek Records),

which has shown that language is not necessarily a limitation for reaching foreign independent music markets such as that of Europe. In Peru, artists such as Dengue Dengue Dengue, Animal Chuki and Novalima are part of that global scene. Canadian independent music companies can evaluate the possibilities for publishing and distributing Peruvian music to a wider market beyond local and regional levels, as well as opportunities to provide intermediary agents such as sales executives with a broader scope of action.

**“A good opportunity for foreign companies is to get involved in mastering services, as the Peruvian industry lacks appropriate mastering studios.”**

### 3. LIVE MARKET INFORMATION

*Opportunities for Canadian Independent Music Companies in the Peruvian Market*

## 3. LIVE MARKET INFORMATION

Live shows and parties are a rising market. In the last 4 years, there has been an increase of promoters, with a focus on promoting innovative and fresh concepts and experiences in live music shows for the Peruvian audience. This could be surprising when considering the serious lack of proper venues for music. There are only a few venues with sufficient infrastructure, and most of the artists and music programmed at those venues belongs to the mainstream circuit. The lack of venues can be attributed to the following issues:

The few venues that exist are too big for the emerging independent music sector (e.g Anfiteatro Nicomedes Santa Cruz for 4000 people). This carries excessive rental costs for promoters and producers. The result is that those venues are mainly used for the mainstream circuit.

A lack of planning regulations (cultural, urban and architectural) for the promotion of the music industry by the municipalities and the central government.

A lack of investors with a long-term vision for the promotion of more suitable and smaller venues than those on the mainstream circuit. There is a vibrant

independent scene where promoters are in search of venues matching their financial capacity, and this deficiency commonly affects the quality of their events due to the use of improvised places with inadequate architectural conditions. However, no promoter or producer has taken the initiative to procure long-term investment for the creation of a venue catering to the emerging independent music circuit. This can also be attributed to a lack of knowledge in terms of the financial mechanisms and business strategies operating in the independent music sector.

Based on data managed by a website collating research on Peruvian musical cultures (Sonidos.pe), which publishes an agenda of music-related events, it can be estimated that between 30 and 50 live shows occur each week from independent artists in transnational music genres. The graphic below typifies the live shows in the independent scene based on cost of production, ticket price and attendance rates.

Size of Show	Cost	Ticket Price	Attendance
Small	S/.2000 to S/.3500	S/.5 to S/.30	50-250
Medium	S/.3500 to S/.7000	S/.15 to S/.50	250-800
Large	S/.15000 to S/.45000	S/.20 to S/.120	800-2000
Giant	S/.50000 to S/.100000	S/.35 to S/.420	1500-45000

### 3. LIVE MARKET INFORMATION

#### *Opportunities for Canadian Independent Music Companies in the Peruvian Market*

#### 3.1 Promoters and booking agents

In the Peruvian music industry, there is no defined difference between promoters and concert producers, and most companies fill both roles. One Entertainment, a Costa Rican company, act as a booking agent, but their shows are produced by Five Music, which is the Peruvian branch of the same company. The main companies organizing large international shows are below.

**“In the Peruvian music industry, there is no defined difference between promoters and concert producers, and most companies fill both roles.”**

##### Major Peruvian promoters and booking agents

###### All Access

**Previous work:** Festival All Access, Pearl Jam, Ricky Martin, Avril Lavigne, Ozzy Osbourne, Backstreet Boys, Raphael, Roberto Carlos

**Contact:** Milagros Martinez (CEO)

Email: [contacto@allaccess.com.pe](mailto:contacto@allaccess.com.pe) or [martin@allaccess.com.pe](mailto:martin@allaccess.com.pe)

Tel.: (511) 441 4189

Web: [www.allaccess.com.pe/index.html](http://www.allaccess.com.pe/index.html)

###### One Entertainment / Five Music

**Previous work:** Guns n Roses, The Hives, Red Hot Chili Peppers, Oasis, The Ocean Blue, Bon Jovi, James Blunt, Iron Maiden, Metallica, Slayer, Ziggy Marley, Shakira, Green Day, Morrissey

**Contact:** Antonio Jauregui (CEO)

Web: [www.fivemusic.net](http://www.fivemusic.net)

###### Evenpro / Move Concerts Perú

**Previous work:** New Order, Chris Cornell, Travis, Aerosmith, Katy Perry, Elton John, Sting, Paul McCartney, Luis Miguel, Ed Sheeran, Soda Stereo

**Contact:** Italo Rossi (operations manager) or Coqui Fernandez (director)

Email: [italo@moveconcerts.com](mailto:italo@moveconcerts.com)

[coqui@peopleandshows.com](mailto:coqui@peopleandshows.com)

Web: [www.evenpro.com](http://www.evenpro.com)

###### ACT Entertainment

**Previous work:** Ziggy Marley, Nicky Jam, Disney Live

**Contact:** Claudia Figueroa (management assistant)

Email: [claudiafigueroa@actperu.com](mailto:claudiafigueroa@actperu.com)

Tel.: (511) 014558592

Web: [www.actperu.com](http://www.actperu.com)

###### ARTES Peru / Tqproducciones

**Previous work:** Slipknot, Kings of Chaos, Coldplay, Marillion, Depeche Mode, Kiss, Guns N Roses, Moby / Dream Theater

**Contact:** Alberto Menacho (CEO)

Email: [cm.artesperu@gmail.com](mailto:cm.artesperu@gmail.com) or

[tqproducciones@gmail.com](mailto:tqproducciones@gmail.com)

Web: <https://www.facebook.com/artesper/?fref=ts>

###### Kandavu

**Previous work:** Iggy Pop, Capital Cities, Orishas, Molotov, Miki Gonzalez, Dolores Delirio

**Contact:** David Souza (production manager)

Email: [davids@kandavu.com](mailto:davids@kandavu.com)

Web: <http://www.kandavu.com/index.php>

###### Work Shows

**Previous work:** Damian Marley, The Wailers, Soja, Bret Michaels, Steel Pulse, Alborosie

**Contact:** Miguel Angel Carrillo (production manager)

Email: [mac@workshows.com.pe](mailto:mac@workshows.com.pe) or

[gerencia@workshows.com.pe](mailto:gerencia@workshows.com.pe)

Web: <http://workshows.com.pe/wp/>

##### Major Peruvian electronic promoters

In addition, there are a two main promoters of electronic music events, in addition to the promoters of the emerging small, independent electronic music parties, which often book foreign DJs/producers.

###### Vastion (major)

**Previous work:** Road to Ultra (Carl Cox, Armin Van Buren) Don Diablo, DJ Bl3nd, Pic Schmitz, Jack Novack, H110, Danni

**Contact:** Julio César Falcón (sales representative)

Email: [nick@vastiongroup.com](mailto:nick@vastiongroup.com) or

[contact@vastiongroup.com](mailto:contact@vastiongroup.com)

Web: [www.vastiongroup.com](http://www.vastiongroup.com)

###### Loop (major)

**Previous work:** Creamfields, Nicky Romero, Tiesto, Sam Feld, Lost Frequencies, Blasterjaxx, Budfire: Live Hibrid,

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KSHMR, Ilario Alicante, Oxia, Paco Osuna, Feliz Jaehn

**Contact:** Alfredo Ruiz (CEO)

Email: [aruiz@admperu.com](mailto:aruiz@admperu.com)

Web: [www.loop-peru.com/v2/principal.html](http://www.loop-peru.com/v2/principal.html)

#### **Bulbo (indie)**

**Previous work:** Sven Dohse, David Dorad, Mira, Schwarzwaldler, Krink, Maxi Storrs, Frau Kreis, Pablo Tarno, Chk Chk Chk

**Contact:** Diego Hildalgo, Jota Haya

Email: [jhayadelatorre@gmail.com](mailto:jhayadelatorre@gmail.com)

Web: <https://www.facebook.com/proyectobulbo/>

#### **Casa Locasa (indie)**

**Previous work:** Philip Gorbachev, Rodion, Kim Ann Foxman, Egos, Jacques Renault

**Contact:** Oscar Holguin (manager)

Email: [culto@casalocasa.com](mailto:culto@casalocasa.com)

Web: <https://www.facebook.com/CasaLocasa/about/>

#### **Daze (Loop) (indie)**

**Previous work:** Robin Ordell, Dan Andrei, Maayan Dinam

**Contact:** Alfredo Ruiz (manager)

Email: [aruiz@admperu.com](mailto:aruiz@admperu.com)

Web: <http://www.loop-peru.com/v2/principal.html>

#### **Independent and international Peruvian promoters**

In the instances of small and medium shows, the market is split between a wider range of promoters. For international shows, the main companies are Veltrac and Headsouth. Although the companies could work as booking agents, the reduced size of the audience for independent artists limits the number of shows bands can have in Peru (and even further, mostly limits the location to Lima). Therefore, the possibility of being booked by other producers in the sector is constrained. Usually, independent international artists have only one gig. Nonetheless, Veltrac and Headsouth have kept growing in the last 4 years and constantly organize live shows. They are evolving their way of production, always searching for the next acts sparking local interest. The following list provides more information about the two companies:

#### **Veltrac**

**Previous work:** Foals, Kurt Vile, Crystal Castles, Tame Impala, Belle and Sebastian, Foster the People, MGMT

**Contact:** Jose Velazquez (CEO)

Email: [info@veltracmusic.com](mailto:info@veltracmusic.com)

Tel.: (511) 446 7716

Web: <http://www.veltracmusic.com/>

#### **Headsouth**

**Previous work:** Courtney Barnett, Deafheaven, The Joy Formidable, NOFX, Title Fight, Clap Your Hands Say Yeah

**Contact:** Jose Franco (CEO)

Email: [management@headsouth.pe](mailto:management@headsouth.pe)

Web: <http://www.headsouth.pe/>

### 3.2 Festivals

The following list shows the festivals in Peru that program independent, foreign, English-language artists.

**Lima Indie Fest** is a club festival presenting the diversity of “indie” dance rock and post punk Peruvian revival bands. It has an attendance of around 1500 people.

**Contact:** Carlos Compson (director)

Email: [limaindiefestival@gmail.com](mailto:limaindiefestival@gmail.com)

Number of editions: 10

**Festival LIMA** is one of the more ambitious music festivals. With a strong production and logistics team, they have presented some of the more popular regional “indie” artists. Their attendance was below 1000 in the first edition. However, based on social media promotion, the 2016 edition showed a more promising result, although data has not yet been published on the outcome.

**Contact:** Christopher Farfán (director)

Email: [chris@audiobeat.pe](mailto:chris@audiobeat.pe)

Number of editions: 2

**Selvámonos** is the only alternative festival for globally-known music made outside Lima. Organized by a French and Peruvian non-profit cultural association, Selvámonos Prod., it is based in the Oxapampa village in the Amazonian highlands, 6 hours away from Lima. The last two editions boasted over 4000 attendees. In January, Peru’s summer season, the organisers also curate the Electro Selvámonos with electronic music acts and, in April, the Primera Parada, which combines the best acts from previous editions of the Oxapampa’s Festival, which

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### 3. LIVE MARKET INFORMATION

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itself takes place between the end of June and beginning of July.

**Contact:** Lionel Igersheim (director) or Gabriela Castrioto  
Email: [gabs@selvamonos.org](mailto:gabs@selvamonos.org)

Tel.: (511) 989 596 369 (Igersheim) or +51946072495 (Castrioto)

Number of editions: 8

**Vivo x el rock** is the biggest Peruvian music concert. It is not exactly a festival, because it lacks other art activities, but they have developed a formula that capitalizes on the eagerness of seeing foreign artists from the 80s and 90s. The last two editions saw an attendance of over 35000 people, hosted across 4 stages in locations such as the National Stadium and the San Marcos National University's Stadium.

**Contact:** César Ramos (director)

Email: [cesarramos@vivoxelrock.com](mailto:cesarramos@vivoxelrock.com)

Number of editions: 8

**Ciudad rock** is a festival with a healthy attendance attributed to the artists in the lineup, besides the fact that they are not musically related to each other. For example, a past edition placed Iggy Pop on the bill after Capital Cities in the Monumental Stadium. Although there is no official attendance figure, it is estimated to be over 8000 people.

**Contact:** David Souza (Kandavu Productions)

Email: [davids@kandavu.com](mailto:davids@kandavu.com)

Number of editions: 2

**Festival Cultura Libre** is the only ongoing public festival being produced with regularity. It is oriented to experimental and contemporary pop rock and electronic audiences. For the next edition, in May 2017, they have already confirmed the Canadian band Bad Bad Not Good, paying them a fee of approx. US\$ 10,000 and covering accommodation and food. The festival received over 5000 people at each of their past editions. The organizer is the local government of the San Isidro District.

**Contact:** Talia Vega (Cultural Manager)

Email: [talia.vega@munisanisidro.gob.pe](mailto:talia.vega@munisanisidro.gob.pe)

Number of editions: 2

#### **Showcase**

Peru does not have an established showcase system, but

there is some precedence of showcases within existing academic activity or as sideshows at festivals.

**Festival L.I.M.A** is an indie festival that organizes sideshows at available Barranco venues during the week of their main event. The organization depends on the artist's crew and the venue's promoters.

**Contact:** Christopher Farfán (director)

Email: [chris@audiobeat.pe](mailto:chris@audiobeat.pe)

Number of editions: 2

**CONECTA** is a gathering of local cultural industries, not as a music market, but as an informative event. They invite foreign cultural specialists and organize music showcases as an event activity.

**Contact:** The Minister of Culture

Email: [lfigueroac@cultura.gob.pe](mailto:lfigueroac@cultura.gob.pe)

Number of editions: 3

**Music Market** are operated by the official government agency for the promotion of tourism, PROMPERU. It is a small showcase activity for 5 bands, titled **PROMPERU's music market**.

**Contact:** Gilda Ortiz

Email: [gortiz@promperu.gob.pe](mailto:gortiz@promperu.gob.pe)

**Emprende Música Showcases** is a showcase organized by Sonora Agencia in Arequipa with local bands as part of an academic activity called "Emprende Música". Emprende Música is a training space for the music industry that aims to integrate the agents in the independent music sector and help in their professionalisation. It provides the tools and resources to grow their business and achieve sustainability, connecting with other Latin American developing markets. The project was launched by Sonora Agencia and Centro Cultural Peruano Norteamericano (North American Peruvian Cultural Center), in collaboration with Red Sonar, the Head of Culture from Arequipa, the Ministry of Production and the Business Incubator of the Catholic University of San Pablo. Other organisations and groups from Arequipa, Lima and Cusco also participate in the project. The showcase consists of a process where 20 independent bands submit their work to a jury, which in turn selects 4 bands to participate in the concert. The chosen bands then join a guest band

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### 3. LIVE MARKET INFORMATION

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that presents a new release in the showcase as well.

**Contact:** Martin Adriaola (director)

Email: [madriaola@gmail.com](mailto:madriaola@gmail.com)

Web: <https://www.facebook.com/events/809674349166432/>

Number of editions: 1

#### **Seasonal live music market dynamics**

Peru's seasons are identified as summer and spring from September to March and autumn and winter from April to September. During the summer season in coastal cities such as Lima, a big portion of the live music market activity moves to the beaches (approximately 30-60 minutes outside of Lima's central urban area). During this season, Lima's coastal area has a vibrant nightlife, where many small and medium gigs, parties and concerts take place, mostly playing reggaeton, latin pop and electronic music. In contrast, Andean cities such as Cusco and Arequipa host their parties and festivals during the autumn and winter (the dry season).

Most of the international events and festivals in Lima take place between September and early December. Selvamonos is the only organization with the concept of a "season". Their annual cycle begins in November, with Electro Selvamonos taking place on the beach in January, the "Primera Parada" ("First Stop") in Lima in March/April and Oxapampa's Selvamonos Festival at the end of June. Oxapampa's event is the only festival outside of the cities.

#### **City**

Peru's cities have an annual calendar of holidays and seasons which follows not only the climate but also work trends and academic periods. The university schedules determine part of the audience flow. During summer vacations, both audiences and musicians tend to travel outside the cities. During mid-year university holidays (July - August), it is possible to identify an exchange between inner cities, as well as from the capital to different tourist destinations. Commonly, northern beaches such as the one in Piura and Tumbes and the cities of Cusco and Huaraz are the main local tourist destinations. However, the lack of proper venues and developed production services hinders private initiatives to organize festivals or big concerts. Nevertheless, local promoters or venues sometimes organize small

and medium gigs in order to take advantage of tourist activity.

Most of the festivals and larger music shows take place in the cities, primarily between August and mid-December. During the first half of the year, the musical calendar is aligned with the university calendar and work holidays. The capital city of Lima has two primary music circuits: one which operates in downtown Lima and one in the Barranco district.

#### **Multi-arts Festivals**

These festivals tend to dedicate themselves to a specific kind of art, although some do integrate different artistic expressions. This interdisciplinary dynamic is fundamental for the organization of an event that could truly be called a "festival". Besides Selvamonos, which is mainly focused on music, and FITECA, mainly focused on theatrical arts, the Festival Integraciones is one of the events that presents music, video, plastic arts, technology and academic analysis. It is organized by Espacio Fundación Telefónica.

#### **3.3 Touring structure**

**"Peru does not have a proper touring structure, not even for their local artists, so each gig has to be developed from ground zero."**

Peru does not have a proper touring structure, not even for their local artists, so each gig has to be developed from ground zero. The industry is characterized by a grassroots, or bottom-up, approach. Only the mainstream pop, huayno and tropical artists can travel throughout cities in Peru with some production standard. Touring conditions can be differentiated into four forms:

1. The (local) band invests in and organizes their event themselves, using their social networks or hiring a producer.
2. A local promoter books the band for a show in a club (promoters that work with clubs).
3. A club hires the band and organizes the show.



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### 3. LIVE MARKET INFORMATION

#### *Opportunities for Canadian Independent Music Companies in the Peruvian Market*

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4. A local promoter organizes the show independently in an improvised venue and pays a fee to the band.

#### **3.4 Fees & Logistics**

Although there are various possibilities of coordination, usually the promoter offers to cover accommodation, meals, rider specifications, local transportation and local promotion. When the show is a well-known band, the promoter can charge a fee, which can include the charges and plane ticket costs. It is also likely that they will tend to invite a band capable and willing to cover their own costs. In order to make international shows profitable, it is wise to book shows in a tour through the promoters of different capital cities in South America. This way, ticket costs are shared between promoters.

**“In order to make international shows profitable, it is wise to book shows in a tour through the promoters of different capital cities in South America. This way, ticket costs are shared between promoters.”**

#### **3.5 Opportunities for Canadian artists in the live music market**

In each segment of the live music market, Canadian companies and music organizations can find possible partners. Promoters and festivals looking for new interesting artists set a wide range of possibilities, depending on the scale of the show and music style. There is a strong interest in assisting international music markets, and events such as Canadian Music Week are a destination of interest for local music producers.

Peru has a lack of proper venues. Acoustic solutions and the administration of live venues urgently need to be addressed. In that context, there are opportunities for Canadian investors to create new venues suited to the budget of the emerging independent music sector. A collaborative exchange of knowledge between Peruvian and Canadian associations could provide the political context to foster the use of public spaces able to host big audiences. The most common strategy is to rent a space and build the infrastructure needed for a show. Local show organizers have developed their own show

proposals as holistic artistic experiences. This brings an opportunity for Canadian organizations to exceed local audiences' expectations by coordinating live experiences with the promoters operating with the “show as an artistic experience” approach.

**“Promoters and festivals looking for new interesting artists set a wide range of possibilities, depending on the scale of the show and music style. There is a strong interest in assisting international music markets, and events such as Canadian Music Week are a destination of interest for local music producers.”**

## 4. PUBLISHING MARKET

Opportunities for Canadian Independent Music Companies in the Peruvian Market

# 4. PUBLISHING MARKET

### 4.1 Collection societies regime

There are three collection societies, one for each right.

APDAYC (“Peruvian Association of Authors and Composers”) is the main representative organization of Peruvian authors and composers and is responsible for collecting royalties nationally and internationally in addition to licensing music. It has covenants with foreign collecting societies, all of which it keeps good relations with. However, they have been sued by INDECOPI (the governmental entity that supervises their activities) for fraudulent management and a lack of transparency in revenue distribution. Most of working musicians do not want to enter into music rights societies, and the TV networks refuse to pay royalties because of the bad reputation it has developed.

Based on APDAYC’s official data (2014), the total income of this collecting society for the concept of royalties was S/. 57,067,835 (22,100,89 CAD\$) in 2014. Table 4 shows how this income is divided between sectors. The distribution of royalties in 2013 amounted to 18,585,464 S/. Of this amounted to, S/. 6,633,730 was paid to foreign collecting societies. In terms of royalty distribution for foreign collecting societies, ASCAP (USA), BMI (USA), SCAM (Mexico), PRS (United Kingdom), SGAE (Spain) and SAYCO (Colombia) were the most prominent (see Graph 3).

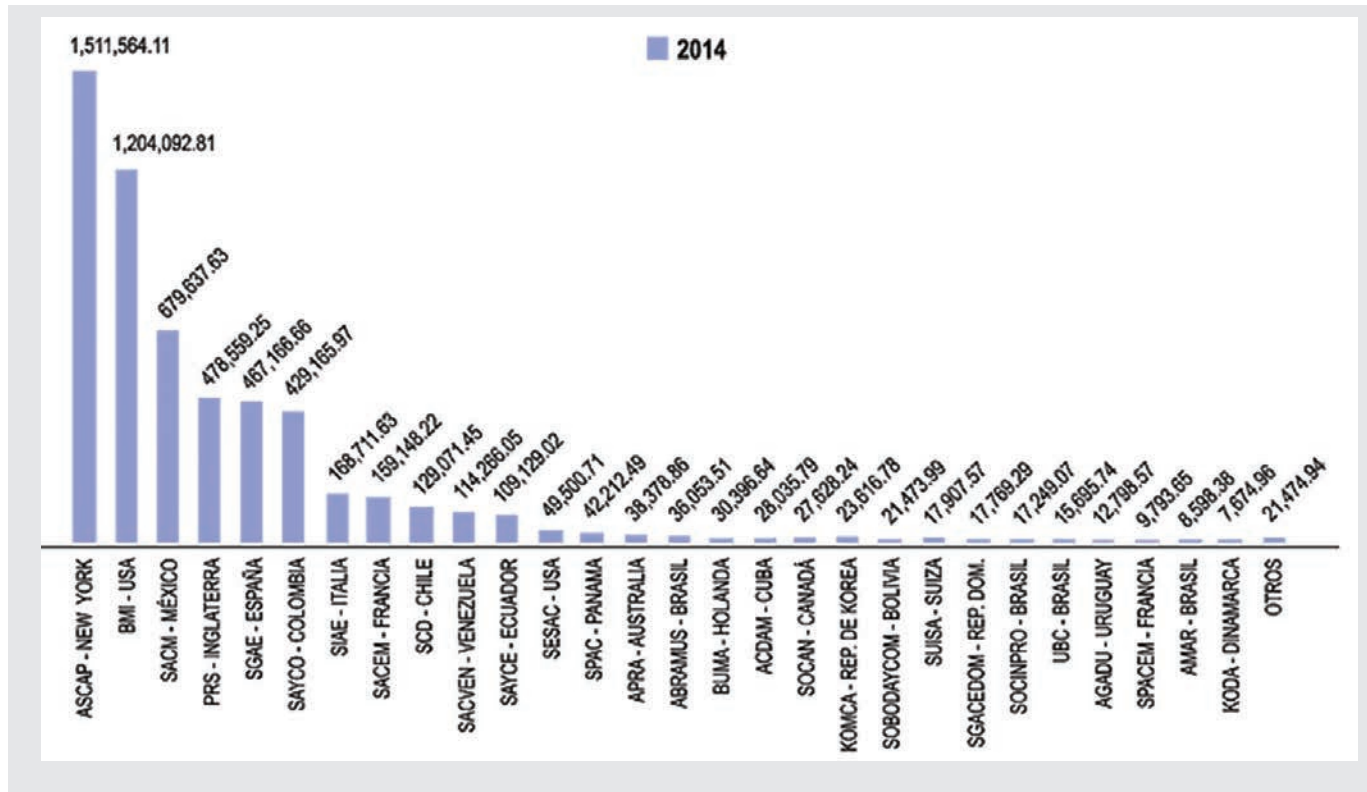
**“Local artists strongly rely on foreign collection societies to secure their global royalties, and some retail stores need access to royalty-free music.”**

Source	Income S/.	%
Permanent venues	15,435,600	27.08%
Parties	9,938,800	17.41%
Shows	5,715,731	10.02%
Department Stores and Supermarkets	5,915,723	10.37%
Megaconcerts	3,840,057	6.73%
Television	5,523,850	9.68%
Cable	4,736,298	8.23%
Radio	3,024,433	5.30%
Foreign collection	761,507	1.33%
Other	1,620,500	2.84%
<b>TOTAL</b>	<b>57,067,835</b>	<b>100%</b>

Table 4: APDAYC royalties collected by source  
Source: Apdayc (2014)

## 4. PUBLISHING MARKET

*Opportunities for Canadian Independent Music Companies in the Peruvian Market*



Graph 3: APDAYC's royalty distribution for foreign collecting societies Source: Apdayc (2014)

**UNIMPRO (“Peruvian Union of Phonographic Producers”)** encompasses independent labels and most musicians registered as phonographic producers of their own records. The amount paid in royalties is small, but they comply with ISRC and manually track the music. They have good communication streams with IFPI, the radios and local governments.

**SONIEM (“National Association of Interpreters and Performers”)** is a new organization, operating since 2009. SONIEM has fewer members and is therefore less known in the music community. The society receives 50% of the amount collected by UNIMPRO.

**INDECOPI Supervision:** was created in accordance with the law DL 822, which is dedicated to intellectual property (IP), but the regulation for the implementation of this law has not been formulated yet. Many people do

not understand the common practices associated with creating and using IP, and this office was created to help deal with claims and promote best practice in dealing with IP. It is a branch of the Presidency of the Council of Ministers, thereby holding legal status to practice public law.

### 4.2 Sync Opportunities for Canadian artists

The sync market dynamic is in the process of being reorganized by INDECOPI, and this year the institution is imposing steep fines for intellectual rights infringements. Until now, the use of covers without authorization was common practice, but new regulations are expected to significantly impact this.

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## 4. PUBLISHING MARKET

### *Opportunities for Canadian Independent Music Companies in the Peruvian Market*

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The sync market is led by the recording studios that make jingles. Most sync uses mainstream domestic and international music, although there are a few cases of local independent artists being featured. Many of the local bands and artists do not have a clear understanding of legal complexities, and therefore many of the agreements between the authors of the work and the users are not fair.

There are some lawyers and IP specialists dedicated to overseeing sync licenses. This market opportunity in the music ecosystem has contributed to the emergence of new initiatives, such as FILMTRAX, an online publisher offering legal advice and a catalogue accessible through a customised search engine. This startup has taken part in MIDEM in Cannes and MICSUR in Bogota. The full FILMTRAX platform will be officially released in the summer of 2017.

### **4.3 Opportunities for Canadian artists in the publishing market**

Currently the music publishing market is being reconfigured, which brings a set of opportunities. Local artists strongly rely on foreign collection societies to secure their global royalties, and some retail stores need access to royalty-free music. The online publisher FILMTRAX is a dynamic company with a regional scale. It is a local publisher that can offer Canadian music for sync, as well as provide Peruvian music for sync in the Canadian markets.

## 5. SECONDARY MARKET

*Opportunities for Canadian Independent Music Companies in the Peruvian Market*

# 5. SECONDARY MARKET

## 5.1 Gaming

**“The gaming industry in Peru has shown significant growth in the last 3 years, with an average annual growth of 40%. There are over 30 gaming companies in Peru, and some have developed products for Cartoon Network, Nickelodeon, Nintendo and Sony.”**

The gaming industry in Peru has shown significant growth in the last 3 years, with an average annual growth of 40%. There are over 30 gaming companies in Peru, and some have developed products for Cartoon Network, Nickelodeon, Nintendo and Sony. According to the Peruvian Association of Videogames and Animation (APDEVA), the annual turnover of the industry is around US\$ 10 million, which encompasses their production for both the domestic and international markets. There is no available data to show the impact of each company in the sector, but according to experts, two of the most important are Bamtang and ChichaGames.

Synchronization is not a large sector of the industry due to the complexity of the legal process, the lack of legal experts on this field and the high costs. Experts suggest that companies prefer to hire private musicians to create music for their games, and that the number of professionals in this field is minimal.

The study has identified 3 representative associations for gaming companies:

IGDA Perú is the local chapter of the International Game Developers Association (IGDA), a worldwide representative association for gaming companies. IGDA Perú has 8 members:

- Bamtang
- Boneless
- Leap Game Studios
- ArtiGames
- NorthSouth Studios
- Pariwana Studios
- Chicha Games
- Online Studios

APDEVA (Peruvian Association of Videogames and

Animation) represents the following companies:

- 3S Animation
- 3S Games
- Apus
- Animedia
- ArtiGames
- Maneki Studios
- Black Sow Games
- Caracoles
- ArtiGames CED
- Dolphin Films
- Golem
- Holo
- Inka Studios Entertainment
- Kuraka
- Iquitos Play
- Jenabe Technologies
- Cosmic Dog Games
- Neural Gaming
- Online Studio
- Pacha Studio
- Playwith
- Red Animation
- RedPost
- InPulse Games
- Spekro Entertainment
- Tech Hunter Entertainment
- Tekton Labs
- Unforgiven
- Web Developer Group
- Yolo Media

CVA (Videogames Companies Associated) represents the following companies:

- Bamtang
- Boneless
- Chichagames
- FreekiMedia
- Leap Game Studios
- Mogma Creations
- Mas Gamers
- NorthSouth Studios
- Pariwana Studios
- Pixattic
- Toulouse Lautrec

## 5. SECONDARY MARKET

### *Opportunities for Canadian Independent Music Companies in the Peruvian Market*

#### 5.2 Merchandise

Usually, for the production and sale of merchandise, bands and artists in Peru separately hire the designer, producer and seller. There is an integrated service on offer for all aspects of merchandising. Hacemos Merch (<http://www.hacemosmerch.com/>) sells merchandise online, but purchasing is done through bank deposits due to the ongoing distrust of online transactions. A few companies specialize in designing music-related merchandise, such as Galleta Gráfico (<https://www.facebook.com/galletagraficodesign/>).

Based on interviews with artists' managers, the study has identified the following steps in order to produce and sell merchandise:

1. Bands and artists (or their managers) hire a merchandise producer.
2. In order to conduct a sale, it is necessary to have a registered company. It is important to highlight that when companies in Peru are involved in commercial activities (selling services or goods), they are required to pay the "Impuesto General a las Ventas-IGV" ("Sales Tax"). This tax is calculated at 18% of the total amount of the prices of services or goods sold by the artist in Peru.

	Cost of production	Offered price
Low quality	S/. 13 to S/. 17 (CAD \$ 5 - 7)	S/. 26 to S/. 30 (CAD \$ 10 - 12)
High quality	S/. 25 to S/. 35 (CAD \$ 9 - 14)	S/. 40 to S/. 50 (CAD \$ 15 - 20)

Table 5: Cost of production and price bands for merchandise

The main merchandise items sold by artists are t-shirts, wallets, patches, stickers and pins. Prices vary according to the material of the product. Bands and artists must be aware of the economic capacity of their audience in order

to produce affordable merchandising. As a reference, Table 5 shows the costs of production and the prices bands and artists use to offer them, as depicted by a t-shirt.

Following the global 'vinyl revival', the market has also grown in Peru and in particular in Lima. Vinyl store managers claim they can sell up to 50 albums in one day, and customers are known to spend S/. 160 (CAD \$61.81) on a single record, some even willing to spend S/. 1000 (CAD \$386.34) during one purchase. New vinyl stores have opened in Lima, and other music- and technology-related stores have begun to sell both vinyl and turntables.

#### 5.3 Brand engagement

**“Brands are increasingly filling the spaces left by the old major labels and music companies, fragmenting the historic system of operations.”**

Brands are increasingly filling the spaces left by the old major labels and music companies, fragmenting the historic system of operations. Financing, distribution, advertising, product placement, logistics, venues, booking and organizing shows the main collaborative opportunities between brands and music organizations.

##### Sponsoring

**Adidas Originals:** There are two Peruvian bands that are currently being financed by the sportswear brand, with annual payments for band's activities registered at S/.20,000.

**Converse:** The shoe company has a history of sponsoring independent music events and organized the Converse Rubber Track in 2015, which gave artists the opportunity to record in professional studios.

**Motorola:** The mobile phone and technology company often sponsors shows by independent international artists in Lima in conjunction with Veltrac Music.

##### Distribution

## 5. SECONDARY MARKET

### *Opportunities for Canadian Independent Music Companies in the Peruvian Market*

**Starbucks:** The popular coffee store chain places selling points in their stores for local artists' CDs. They also pay for the manufacturing and intellectual rights to create compilations of local artists, such as the Viaje Peruano compilation, released in 2010. Each of the seven featured artists received US\$ 200 for two songs in a CD, of which 1000 copies were manufactured.

#### Product Placement

**Huawei:** The Asian mobile phone brand has started to work with the local band "Tourista" in a deal that includes synchronization, private shows and a strong representation in the band's social networking presence via product placement.

**Jagermeister:** The alcoholic beverage has a history of hosting and sponsoring many music events globally, such as at the Help Retro Bar (<https://www.facebook.com/helpbaroficial/>).

#### Logistics

**Sab Miller (ex-Backus):** This is the biggest beer company in the country and the main brand working with music. The company determines which of its line of drinks is best suited to sponsor the show based on the scale of sales, the kind of music being performed and the target audience. Pilsen, Cristal, Cusqueña, Ice, and Pilsen Trujillo are the brands that usually sponsor stage and sometimes the PA system. They have a network of stage providers (companies overseeing the building and management of the stage) at their disposal.

**Red Bull:** Red Bull usually provides logistic support for events, such as branded DJ booths and freebie products for the event's producers. Red Bull also organizes the regional and national hip-hop battle, "Batalla de los Gallos".

#### Venues

**Jack Daniels:** The brand has a bar in the Asia Boulevard shopping mall, a popular summer destination on Lima's southern coast and the most exclusive beach along the Peruvian coast. The bar often hosts live shows with local bands.

#### Booking and organization of shows

**Movistar:** The mobile brand has financed several tours in the inner main cities and often sponsors large mainstream concerts. The company has also developed the platform Movistar Music (see section 2.3).

#### Music contests

**Rock in Bambos:** The hamburger franchise hosts the most important school-based rock contests.

**Claro Music Award:** For 8 years, the mobile brand has hosted a contest with 3 categories and US\$ 30,000 in prizes (more information can be found in Section 2.3).

#### Advertising

**BBVA Bank:** One of the main advertising campaigns around music this year is that of "Radio BBVA", working with local bands by programming them on a radio show hosted by a local pop artist, using their songs and images for free in their ads and programming music profiles for each featured artist in their agencies. There is no official payment for this process.

### 5.4 Other players

**Doble Nueve Radio (Double nine)** has a long history of programming English-speaking and electronic music. Its audience is composed primarily of middle and upper class people. The FM radio station differs from other stations in that it programs rock, punk, garage, reggae, electronic and dance, among other international non-Latin genres. Promoters of international independent scenes or local transnational-genres events often advertise on this station.

**Contact:** Guillermo Bustamante Romero ([guillermo@radiodoblenuve.com](mailto:guillermo@radiodoblenuve.com))

**Web:** <http://radiodoblenuve.com/>

**Señor Z** is one of the most important emerging audiovisual collectives, mainly producing commercial spots for TV and digital platforms. They also produce Playlitz (<http://playlitz.pe/>), an online and mobile platform featuring videos of local bands recorded in special locations.

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## 5. SECONDARY MARKET

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**Contact:** [lorena@z.com.pe](mailto:lorena@z.com.pe)

**Web:** <http://www.señorz.com.pe>

#### 5.5 Publishing for recorded music

**“The physical recorded music market has decreased dramatically in the last few years, leaving most of today’s records to be self-published by Peru’s composers and musicians.”**

The physical recorded music market has decreased dramatically in the last few years, leaving most of today’s records to be self-published by Peru’s composers and musicians. By doing so, musicians retain all their rights and control over each step of the production cycle. Most of Peru’s domestically published music is sold by its authors at their live shows.

There is one company called “11 y 6” which distributes CDs through supermarkets, placing sales points at cash registers and stands inside stores. Their products are mainly compilations of cumbia, ballad and classic rock pop artist. Most of the time, independent labels work as distributors or co-publishers hired by each band and artists. In some cases, the label pays for the recording and/or the mixing and mastering process.

#### 5.6 Opportunities for Canadian artists in the secondary market

In relation to the opportunities in the gaming industry, CICs should evaluate the possibilities of introducing their music catalogues at affordable prices in order to compete with music created by local musicians. Although synchronization is not a large industry, the growth of the Peruvian gaming industry means companies are being hired by international companies that produce English-language content (Nickelodeon, Sony, etc.). This presents opportunities for introducing English-language music, something that the local market lacks.

In the merchandising sector, CICs involved in production can develop platforms to provide services for local merch sellers. The distrust towards online purchasing is progressively changing and will soon pose a new context for online commercing.

Current vinyl production takes place abroad, so CICs can develop links with local independent record labels in order to provide the service of pressing vinyl. Additionally, vinyl retailers have problems importing small amounts, and some of them have started to organize in order to import a bigger stock order, thereby reducing costs. This is an opportunity for CICs to export vinyl from Canadian sellers and introduce them to the Peruvian market.



# 6. MEDIA AND PR

## 6.1 How the PR market works

**“PR agencies work with both digital and traditional media, social media influencers, sponsorship partners and other music agents. Press rounds, press conferences and release parties or shows are common strategies used by large events producers.”**

There are different styles practiced by PR companies. There is a dynamic where journalists and communication professionals transition to work in PR agencies. Individuals naturally undertaking some PR tasks for international music shows can also start dedicated agencies to focus their new skills. Currently, many musicians and journalists open their PR agencies or departments within their companies.

Big international brands have their own PR departments, but they often require the services of specialized music agencies for specific products. PR agencies are a key element in the chain of value because they support the sustainability of the events through organization, and they apply the strategies needed to reach the right audience.

A PR service can include compiling press notes and a database of contacts, but they also coordinate press attention and coverage of the event. PR agencies work with both digital and traditional media, social media influencers, sponsorship partners and other music agents. Press rounds, press conferences and release parties or shows are common strategies used by large events producers.

The following are some of the most important press and PR agencies linked to the Peruvian music industry:

- **Mejía Valencia Velit MVV** (<http://www.mvvasociados.com/>)
- **FRS** (<http://www.frs.pe/>)
- **3 Puntos** (<https://www.facebook.com/3puntos/>)
- **Foronda Brand** (<https://www.facebook.com/ForondaBrand/>)
- **COHETE Lab** (<http://cohetelab.com/>)
- **MediaLab Marketing** (<http://www.medialabla.com/>)
- **Cabeza Hueca** (<https://www.facebook.com/AgenciaCabezaHueca/>)

## 6.2 Media that includes foreign music related content

**“Newspapers are the main media agents covering musical content, followed by television and, finally, radio.”**

Newspapers are the main media agents covering musical content, followed by television and, finally, radio. Through each of these mediums, entertainment sections are divided into two categories: an arts and culture-focused section and a showbiz and entertainment-focused section.

### Print

**El Comercio** is the biggest newspaper in the country. Their cultural section is called “Luces”, and their Saturday magazine, “Somos” and includes information about local and international artists.

**Contact for “Somos”:** Oscar García

Email: [ogarcia@comercio.com.pe](mailto:ogarcia@comercio.com.pe)

**Contact for “Luces”:** José Tsang

Email: [jose.tsang@comercio.com.pe](mailto:jose.tsang@comercio.com.pe)

**Perú 21**, in addition to its entertainment sections, has a culture section that includes the section Movidá 21 on Mondays, where audiences can find mostly local artists, but also international artists with upcoming Peruvian gigs.

**Contact:** Mijail Palacios

Email: [mpalacios@peru21.com](mailto:mpalacios@peru21.com)

**La República** is the second most important journal with national circulation. It has a cultural section, but it is hard to find coverage on music in foreign languages. They are working with Descabellado Records to develop a music magazine.

**Contact:** Santiago Pillado

Email: [contacto@descabellado.pe](mailto:contacto@descabellado.pe)

**El Peruano** is a nationally distributed journal primarily focused on the legal trades, but they offer a cultural section called “Variedades”, with information on national and foreign music, as well as a digital section called “Agencia Andina de Noticias”.

**Contact:** Fidel Gutierrez

Email: [fgutierrez@editoraperu.com.pe](mailto:fgutierrez@editoraperu.com.pe)

**Publímetro** is the biggest current events publication in Latin

## 6. MEDIA AND PR

### *Opportunities for Canadian Independent Music Companies in the Peruvian Market*

America, distributed for free in areas of high pedestrian traffic such as subways and bus stops. It has exclusive coverage of and interviews with international and domestic artists.

**Contact:** José Barreto

Email: jose.barreto@publimetro.pe

**Cosas** is the primary high lifestyle magazine. Its music section boasts a strong team of writers, and its current editor-in-chief was previously the magazine's chief music journalist.

**Contact:** Raúl Cachay

Email: rcachay@cosas.pe

**Caretas** is a political magazine with a small arts section that sometimes includes music, such as coverage of international shows in Lima.

**Contact:** Carlos Cabanillas

Email: ccabanillas@caretas.com.pe

#### Television

**TNP (Peruvian National Television):** A public station and the only channel with national coverage. It features *Metrópolis*, a cultural magazine in television format for the national network.

**Contact:** Melva Rojas

Email: melvitis@gmail.com

**Canal Ipe:** A youth-oriented cultural channel featuring *Clandestino*, a television-format cultural magazine.

**Contact:** Martín Espinoza

Email: mespinozab@tvperu.gob.pe,  
clandestino@canalipe.tv

**Mapa Sonoro:** A music documentary show, broadcasted by TNP and Canal Ipe.

**Contact:** Gustavo De La Torre

Email: Gusdlt@pasaje18.com

**RPP TV:** A news channel on cable TV.

**Contact:** Olín Plácido

Email: oplacido@gruporreppe.com.pe

**Plus TV:** A cable channel with cultural and entertainment content.

**Contact:** Sebastian Cosen

Email: sebastian.cosen@telefonica.com

**Movistar Música:** A cable channel dedicated to Peruvian music.

**Contact:** Barbara Martire

Email: barbara.martire@telefonica.com

#### FM Radio stations

Grupo Radio Programas del Perú (RPP): a radio corporation which oversees Studio 92 and Radio Oxígeno (mostly focused on 70s, 80s and 90s mainstream music).

**Contact:** Arlet Latorre

Email: alatorre@gruporpp.com.pe

**Corporación Radial del Perú:** a radio corporation featuring Radio Planeta and Radio Oasis (mostly focused on 70s, 80s and 90s mainstream music).

**Contact:** Micky Quiñones

Email: mquinones@crp.pe

**Radio Comas:** Local radio.

**Contact:** Gonzalo Días

Email: Comas@radiocomas.com

**Radio San Borja:** Local radio.

**Contact:** Sector M, music show

Email: produccion@sectorm.pe

#### Digital Press

**Conciertos Perú:** A music website.

**Contact:** Santiago Silva

Email: prensa@conciertosperu.com.pe

**Perú.com:** An entertainment website.

**Contact:** Ana María Morocho

Email: ana.morocho@peru.com

**La Mula:** A news and culture website .

**Contact:** Nayo Aragón

Email: nayo.aragon@lamula.pe

**Sonidos.pe:** A music research website.

**Contact:** Camilo Riveros

Email: contacto@sonidos.pe

**InfoArtes:** The channel for the Ministry of Culture.

Email: infoartes@cultura.gob.pe

# 7. VISA SYSTEM, TAX POLICY AND OTHER PRACTICAL INFORMATION

In order to perform in Peru, foreign artists are required to provide the following prerequisites:

- 1. A contract of art-based work submitted to the Ministry of Labour and Employment Promotion and signed before entering the country,**
- 2. a pass issued by the union of Peruvian Specialty Artists or genre cultivating foreign artists,**
- 3. the respective artist visa, according to the following regulations:**
  - a. The provisions of this Article are also applicable to foreign artists who, under this Act, come to the country to promote or advertise their work, productions or image for interpretation or performance,**
  - b. The Intersyndicate Pass will cost 2% of the amount received by the foreign artist through their proceedings, and their good disposition is key to maintaining a good relationship with the employer.**

When a promoter books a show for a foreign artist, there are tax payments that need to be adhered to as well as considerations to take concerning ticket sales, artist fees and general costs.

- 1. IGV is the general sales tax of 18% (similar to the GST tax in Canada). This applies to every transaction hiring a service or a making a purchase. In this case, the contract of the artist includes the tax.**
- 2. Rent is the rental tax for a non-residential local address, calculated as 15% of the total spending of the artist (flights, accommodation, transport, food, visas, etc.).**
- 3. The aforementioned Intersyndicate pass, which costs 2% of the amount of money earned by the artist for their activity in the country.**
- 4. UNIMPRO and APDAYC costs, which vary according to the agreement reached between producers and the respective societies. In some cases, event producers sign an agreement with the**

**artist in which the artist renounces their royalties concerning a specific date and venue. This way, APDAYD cannot collect their royalties, as many artists do not trust the society to distribute the payments back to their domestic collection society.**

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## Opportunities for Canadian Independent Music Companies in the Puerto Rican Music Market

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**Researcher:** *Sound Diplomacy*

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# 1. OVERVIEW

## “Puerto Rico has the highest economy in the Caribbean Region and the most competitive economy in Latin America”

This research paper is an analysis of the main trends that characterize the contemporary development of the music industry in Puerto Rico.

Overall, the Puerto Rican market is a difficult one for Canadian indie artists to enter. Domestic music preference is highly primed toward Latin music and mainstream music from the USA. It is therefore harder for other genres to get radio plays or press features. Puerto Rico also has high emigration rates, and many successful Puerto Rican-born artists live abroad.

Having said this, penetrating the market through a live tour seems more attainable, as the island organizes plenty of festivals, from small to very large scale, which offer better opportunities for Canadian artists.

### 1.1. Market size and dynamics

Puerto Rico is an unincorporated territory of the United States and it has a commonwealth relationship with the USA. They both share market trade, currency and defense systems. Although Puerto Ricans are citizens of the USA, they don't vote in national elections, nor do they pay federal income taxes. The official languages are both Spanish and English.

With a GDP of \$103.135 Billion, Puerto Rico has the highest economy in the Caribbean Region and the most competitive economy in Latin America. Despite that, in comparison to the different states of the United States, Puerto Rico is poorer than the poorest state of the United States, with 46.1% of its population living below the poverty line. Due to the lack of opportunities and employment, Puerto Rico has been experiencing a high emigration rate to the USA in the last few years.

### 1.2. How to navigate the marketplace

Puerto Rico is an archipelago located in the northeastern Caribbean, east of the Dominican Republic and west of

the United States Virgin Islands and the British Virgin Islands. The capital and largest city of Puerto Rico is San Juan.

70.2% of the population over the age of 12 has access to the Internet. This represents a significant increase if we take into account that just 10 years ago the Internet access for this segment of the population was estimated at 37%.

People between 12 and 39 years of age are the most connected. Indeed, more than 92% of these Puerto Ricans are connected. On the other hand, just two people out of 20 that are over 65 use the Internet.

## “92% of people aged between 12 and 39 and years of age are connected to the Internet.”

### 1.3. Trade conferences and industry gatherings

Music industry gatherings in Puerto Rico are small in size and frequency. Below are 3 of the most well-known.

#### Record Store Day / Día del disco

Organized by the independent record label Discos Diaspora along with la Casa de Cultura Ruth Hernández Torres and the Municipality of San Juan the Record Store Day brings together collectors, independent labels, artists and music fans under one roof for a day full of concerts and other activities.

Below are the running times of Record Store Day's 2016 edition.

#### DÍA DEL DISCO 2016

10:30am - Records market (1st floor)

12:00pm - Group talk: Copyright for artists (2nd floor)

2:00pm - Los Nervios (2nd floor)

3:30pm - Desde República Dominicana... MULA {Talk led by Ezequiel Rodríguez de Frecuencias Alternas and introduction of a live band} (2nd floor)

5:00pm - Las Abejas (2nd floor)

**Contact:** [Discos Diaspora](http://DiscosDiaspora.com), [info@discosdiaspora.com](mailto:info@discosdiaspora.com)

#### Cassette Store Day

As with the Día del Disco, the Cassette Store Day is organized by the record label Discos Diaspora along

with la Casa de Cultura Ruth Hernández Torres and the Municipality of San Juan, the Cassette Store Day brings together collectors, sellers, record labels, artists and music fans to a central market, with acts playing throughout the day.

**Contact:** Discos Diaspora, [info@discosdiaspora.com](mailto:info@discosdiaspora.com)

**Networking events organised by Cluster de la Música de Puerto Rico**

This cluster of Puerto Rican music associations has organised several events for and with music industry professionals. A discussion panel that took place in 2015 discussed the topic “Single, EP or LP: how to release your original work”.

**Contact:** <https://www.facebook.com/clustermusicapuertorico>



## 2. RECORDED MARKET INFORMATION

*Opportunities for Canadian Independent Music Companies in the Puerto Rican Market*

# 2. RECORDED MARKET INFORMATION

### 2.1. Sales

At the moment of finishing research for this report, Puerto Rican sales in isolation from the US recorded music market could not be retrieved.

**“All 3 of the major global music corporations have offices in Puerto Rico.”**

### 2.2. Retail

Currently, there are no Puerto Rican chain retail stores that specialise in selling music. As downloads from the internet increased in popularity, a lot of chains went bankrupt. There are still a few independent stores on the island, such as:

**MUSIC STOP** : located in the Canton Mall in Bayamon, this store sells records as well as instruments, speakers, and other music devices. It often organizes signing sessions.

**LA GRAN DISCOTECA** : this store, located in San Juan, is a specialized music store. You can find records, DVDs and books about music and instruments, as well as concerts tickets.

**VIERA DISCOS** : dubbed the “Cathedral Of Latin Music” or “The House Of The Collectionists”, Viera Discos used to be a “must” for records lovers. It closed in March 2016, but the owner has announced they are hoping to reopen.

Following worldwide a trend, vinyls are making a comeback, boosted by their popularity amongst a wide range of ages. More local artists are releasing their music in vinyl. The best selling genres on vinyl are currently salsa, rock & roll, jazz and local Puerto Rican music.

### 2.3. Mobile

Compared to other Caribbean and Latin American countries, Puerto Rico has a very high mobile penetration. If compared to the US however, Puerto Rico still has a very low fixed line and broadband penetration.

79.5% of the population in Puerto Rico are internet users. According to Digital and Mobile Behavioral Study 2016, women are more active on the internet than men, and people between the ages of 18 and 24 are the largest users of the internet (98%), followed by people from 12 to 39 (92%). Mobiles are the most used device. In fact, mobile internet usage is so widespread amongst young people that Google had planned to use Puerto Rico as a pilot market for its project ara (cellular phones that are constructed using modules). Unfortunately, the project was later suspended, but the figures remain impressive, with 75% of overall internet access made through mobile devices.

Claro is one of the most important telecommunication companies in Puerto Rico and Central and South America. Recently, the company has announced that Claro customers could use the streaming service Pandora without needing any extra internet data.

### 2.4. Streaming

As Puerto Rico is part of the USA, all streaming services available in the US are also available in Puerto Rico. Therefore, all the statistics provided by those platforms are the statistics of the US as a whole, and thus it is difficult to get relevant information about the island itself. That is to say that according to IFPI's list of legal music services available in the USA, the largest and most known platforms such as Amazon, Apple Music, Deezer, Google Play, itunes, Microsoft Music Store, Tidal, Spotify, Youtube and Vevo are available, among many others.

### 2.5. Physical and digital distribution

With the digital revolution, most independent artists record their music in a home studio and then distribute it with online aggregators such as CD Baby. CD Baby and other aggregators allow acts to register from any country in the world and have their songs distributed to all the major streaming services (Spotify, Apple Music, etc.). The cost is \$9.99 to distribute one song and \$39 for an album.

As Puerto Rico is an incorporated territory of the USA, music distribution platforms such as The Orchard, CD Baby, Tunecore, ReverbNation and Loudr all operate in the country.

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## 2. RECORDED MARKET INFORMATION

### *Opportunities for Canadian Independent Music Companies in the Puerto Rican Market*

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#### 2.6. Industry players

All 3 majors have offices in Puerto Rico:

##### **Universal Music Puerto Rico**

804 Ave Ponce De Leon  
Santurce 00907  
Phone: (787) 722-2730  
Web: <http://www.universalmusica.com/>

##### **Sony Music Entertainment Puerto Rico Inc**

1095 Calle Wilson #301  
San Juan, PR 00907  
Phone: (787) 725-6272  
Web: [www.sonymusic.com](http://www.sonymusic.com)

##### **Warner Music**

1502 Ave Ponce de León, Santurce  
Santurce, Puerto Rico 00757  
Phone: (787)-721-8388  
Web: <http://www.wmg.com/>

A lot of independent record labels have been launched in the last 10 years. Below is a non-exhaustive list of those that were registered on Resident Advisor.

##### **Artefekz Labz**

ARTEFEKZ Labz is an independent Puerto Rican company of multimedia production company which focuses on music productions, concerts, performances, art installations, fashion design, video productions, short films and documentaries. ARTEFEKZ Labz also acts as an independent record label that distributes electronic, downtempo and experimental music under the moniker of ARTEFEKZ Muzik.

**Contact:** [info@artefekz.net](mailto:info@artefekz.net)

##### **Borinken House Records**

Borinken House Records is a company created to distribute electronic music through various media outlets and web sites, providing high quality services to producers of this genre.

**Contact:** [borinkenhouse@gmail.com](mailto:borinkenhouse@gmail.com)

##### **Disquera Virtual**

San Juan-based electronic music label which also handles PR and booking. It prides itself on having the best

selection of local DJs.

**Contact:** [bookings@disquervirtual.com](mailto:bookings@disquervirtual.com)

##### **Hy-Land**

Hy-Land is an electronic music record label. Their music is influenced by many tropical sounds and percussions.

**Contact:** [hylandrecords@yahoo.com](mailto:hylandrecords@yahoo.com)

##### **Red Shield Records**

Red Shield Records is a label that aims to deliver quality electronic music of various forms to music enthusiasts worldwide. It exclusively releases Puerto Rican artists.

**Contact:** [info@redshieldrecords.com](mailto:info@redshieldrecords.com)

##### **Discos Diáspora**

Indie record label that aims to deliver good local indie music.

**Contact:** <https://www.facebook.com/pg/discosdiaspora>,  
[info@discosdiaspora.com](mailto:info@discosdiaspora.com)

##### **Last Bummer Records**

Indie pop, rock and lo-fi punk record label. They also work with overseas artists from USA and Europe.

**Contact:** [gabi@lastbummerrecords.com](mailto:gabi@lastbummerrecords.com)

##### **Dead Mofongo Records**

They release music made by local alternative bands of a wide range of genre bands and organise small gigs shows.

**Contact:** [deadmofongo@gmail.com](mailto:deadmofongo@gmail.com)

##### **AtrumOrbis**

Focused on rock, pop, alternative and electro music, this label also acts as an event promoter and is involved in the marketing, promotion and distribution of new independent artists.

**Contact:** <https://www.facebook.com/atrumorbis/>,  
[rockindie@atrumorbis.com](mailto:rockindie@atrumorbis.com)

#### 2.7. Trends

**“The most popular genres performed by Puerto Rican artists are reggaeton, pop, rap and tropical music.”**

The most popular genres performed by Puerto Rican

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## 2. RECORDED MARKET INFORMATION

### *Opportunities for Canadian Independent Music Companies in the Puerto Rican Market*

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artists are reggaeton, pop, rap and tropical music. These acts tend to be signed to corporate record labels and are responsible for most of the music exports of the country.

The following is a list of 3 classic songs that shape the music trends in Puerto Rico:

- 1. Daddy Yankee ft. will.i.am - “Plane To P.R.” (Reggaeton)**
- 2. Big Pun ft. Tony Sunshine - “100%” (Puerto Rican Rap)**
- 3. Ricky Martin - “Living La Vida Loca” (Latin Pop)**

The Puerto Rican market is highly focused on Latin and Caribbean music. The industry tends to only invest in major artists such as the ones mentioned.

Traditional music (Bomba, Plena, or Salsa) is also very popular, especially at local neighborhood parties such as SanSe (fiesta de la Calle San Sebastian).

### 2.8. Strategies

A good way to penetrate the Puerto Rican market is by arranging a tour with local artists or performing at festivals. With a 360° business model, artists and

promoters know the local industry very well, and that can be really helpful in a country and in an industry where knowing the right people is key to succeeding. ”.

**“A good way to penetrate the Puerto Rican market is by arranging a tour with local artists or performing at festivals. With a 360° business model, artists and promoters know the local industry very well, and that can be really helpful in a country and an industry where knowing the right people is key to succeeding.”**

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### 3. LIVE MARKET INFORMATION

*Opportunities for Canadian Independent Music Companies in the Puerto Rican Market*

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## 3. LIVE MARKET INFORMATION

**“Large scale stadium concerts and small independent gigs are required to submit the same amount of paperwork when applying for a production license - and the requirements needed to obtain this license are restrictive.”**

Large scale stadium concerts and small independent gigs are required to submit the same amount of paperwork and jump through all the same hoops when applying for a production license. On paper, large and small gigs are identical. This system was initially instituted to protect domestic producers from outside entities, but it has now become a damaging limiter on grassroots promoters and limits the number of independent productions on the island.

Furthermore, the requirements needed to obtain a production license are restrictive: obtain three years' experience of interning with a producer, earn a degree in musical production, or submit proof of work leading back 10 years. New government policy is urgently needed, facilitating the productions of small events and encouraging events in the squares and theatres that currently sit empty.

There is an emerging circuit of venues that books independent artists in San Juan:

**El Local** programs some Indie events nights, but they are generally focused on bands from Puerto Rico.

**Contact:** [ellocalensanturce@gmail.com](mailto:ellocalensanturce@gmail.com)

**La Respuesta** books a wide range of genres from metal, hip hop, indie, to salsa to Caribbean music from Puerto Rico and neighbouring countries.

**Contact:** [info@larespuestapr.com](mailto:info@larespuestapr.com)

**Club 77** has held some indie international concerts such as The Oh Sees and Jacuzzi Boys. The predominant genre is garage rock, although it covers a large selection of alternative genres such as heavy metal and hip hop.

**Contact:** [bar77pr@gmail.com](mailto:bar77pr@gmail.com)

**Nuyorican Café** hosts a local rock night.

**Contact:** [nuyoricancafe@hotmail.com](mailto:nuyoricancafe@hotmail.com)

**Tito Puente Amphitheater** hosts many concerts throughout the year and is where the Heineken Jazz

Festival is held every year.

**Website:** <https://www.facebook.com/pages/Tito-Puente-Amphitheatre/138658992825221>

**Coliseo de Puerto Rico José Miguel Agrelot** is one of the largest arenas in Puerto Rico. Its capacity varies from 3,500 to 18,000 people, and it has held a number of international mainstream acts such as Marc Anthony, Justin Bieber and Metallica, among others.

**Contact:** [coliseodePuertorico@smgpr.com](mailto:coliseodePuertorico@smgpr.com)

In San Juan, **The Centro de Bellas Artes Luis A. Ferre** (the Fine Arts Center Luis A. Ferre) holds concerts by international Spanish mainstream pop acts such as La Oreja de Van Gogh and Rosana. It usually holds classical concerts and other international acts, such as Dionne Warwick.

**Contact:** Zarilys Torres Morales, programming manager  
[ztorres@cba.pr.gov](mailto:ztorres@cba.pr.gov)

### 3.1. Promoters

#### **Buena Vibra Group**

Founded in 2006, Buena Vibra Group is a marketing agency specializing in promotions, branding and special Events. Buena Vibra is also a lifestyle brand that has expanded into many sectors (apparel, art, music, events, sports and education). Some of the events they have worked include: Skrillex, Indie Music Fest, Calle 13 and David Guetta.

**Contact:** [info@buenavibrapr.com](mailto:info@buenavibrapr.com)

#### **Sparkof Production**

This company, founded in 2004 is specialized in live events and concerts. It maintains a strategic alliance with Universal Music Latin Entertainment. In addition to working with Juanes, Daddy Yankee and some top Latin acts, they also produce big events like the Ciudad Sonido Festival.

**Contact:** [info@sparkof.com](mailto:info@sparkof.com)

#### **Shownet Productions**

Founded in 1990, Shownet Productions works on a diverse range of concerts ranging from Blues to Rock.

**Contact:** [info@shownet.cc](mailto:info@shownet.cc)

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### 3. LIVE MARKET INFORMATION

#### *Opportunities for Canadian Independent Music Companies in the Puerto Rican Market*

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#### **Tony Mojena Entertainment**

This is one of the most complete production companies in Puerto Rico, the United States and Latin America. One of their biggest successes was the production of the 2015 sold out world tour for Ricky Martin, which grossed over US \$70 million.

**Contact:** [info@tonymojena.com](mailto:info@tonymojena.com)

#### **M&D Entertainment**

A production company with experience in organising events in the United States, Puerto Rico and Latin America, they produce Día Nacional del Rock Festival.

**Contact:** [Ricardo Cordero](mailto:ricardo@cordero.com)  
[cordero@mndentertainment.com](mailto:cordero@mndentertainment.com)

### 3.2. Booking agents

To find gigs on the island, most Puerto Rican artists use international booking agencies. There are some local bookers, but they focus on private parties, such as Ineventos or Infinito Productions. Local bookers specialise in live music and batucadas, mariachis, orchestras, shows and music for weddings.

### 3.3 Festivals

**“La Fundación Puertorriqueña de las Humanidades (the Puerto Rican Endowment for the Humanities) records the existence of over one hundred different types of fairs and carnivals that are celebrated throughout the island every year.”**

La Fundación Puertorriqueña de las Humanidades records the existence of over one hundred different types of fairs and carnivals that are celebrated throughout the island every year.

Although most of those shows are local, playing at one of those fairs and festivals could be an opportunity for the independent Canadian Scene. SanSe for instance, would be a great option. All shows are listed on CalendarioPR's website: <http://www.calendariopr.com/>.

Other big festivals include:

#### **Ultra Music Festival**

Ultra Music Festival is an International electronic music festival. The first Puerto Rican edition was in 2015. International artists booked included Steve Angello and Knife Party. A second edition is expected to take place in 2017.

**Contact:** <https://www.facebook.com/UltraPuertoRico/>.

#### **Mega Electronic Music Festival**

Mega Electronic Music Festival is an annual electronic music festival held in San Juan, Puerto Rico. Started by SBS Entertainment in 2011. The 12-hour festival featured international DJs such as Bloody Beetroots, Adam Freeland, Benny Benassi, Sub Focus, Axwell and others. Attendance: 30,000 people

**Contact:** [megaelectronicfest@gmail.com](mailto:megaelectronicfest@gmail.com).

#### **Coors Light Indie Fest**

The Coors Light Indie Fest is the largest indie fest in the Caribbean Region. Its latest edition took place in August in Dorado, on the northern coast of Puerto Rico. It is now on its seventh edition with a previous four in Aguadilla, one in San Juan and the two last in Dorado. The event is produced by the Buena Vibra Group and sponsored by the beer brand Coors Light. Besides national bands and some indie Latin American bands such as Buscabulla, they have also booked international indie bands before, such as Black Lips, Holy Ghost and Cut Copy.

**Contact:** <https://www.facebook.com/CoorsLightPR/>.

#### **Ciudad Sonido Festival**

This festival aims to bring emerging acts to Latin America and integrate them with new local talent. Inaugurated in May this year, the first event took place at La Respuesta in Santurce and featured a combination of Moombathon, Global Bass, Rock, Caribbean Bohemia and Puerto Rican Cumbia. It is produced by Sparkof and targeted at millennial audiences with a programme of fresh music from the United States, Puerto Rico and Latin America.

**Contact:** [info@sparkof.com](mailto:info@sparkof.com).

#### **Puerto Rico Heineken Jazz Fest**

Held in March in San Juan, with a focus on Puerto Rican music styles and Latin Jazz. The festival collaborates with Berklee on a scholarship program called Berklee in Puerto Rico.

**Contact:** [arodriguez3@mendezcopr.com](mailto:arodriguez3@mendezcopr.com).

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### 3. LIVE MARKET INFORMATION

#### *Opportunities for Canadian Independent Music Companies in the Puerto Rican Market*

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#### **Día Nacional del Rock**

Founded in 2016 and held at one of the largest arenas in Puerto Rico, Coliseo de Puerto Rico José Miguel Agrelot, it is organised by M&D Entertainment.

**Contact:** [booking@mndentertainment.com](mailto:booking@mndentertainment.com)

#### **R.A.M.A.S (Rincon Alternative Music & Surf Festival)**

A two-day festival with a large selection of reggae and ska, it takes place at El Ancla Restaurant in Maria Beach (Rincon). Tickets are \$20 per day. It has hosted international bands and artists such as DJ Dano and John Brown's Body.

Webpage: <http://ramasfestival.com/>

#### **3.3.1. Showcase**

Record Store Day and the Cassette Store Day are both potential opportunities for Canadian bands to play at showcases. However, these fairs tend to favour local artists. Signing sessions at Music Stop (mentioned in the retail section) are another way for acts to connect with the public.

Micheo Music is a music equipment shop that also organises musical events and showcases. For example, in 2014, an acoustic and electronic drum workshop featured Japanese artist Akira Jimbo. Despite not being a typical showcase stage, outstanding Canadian independent musicians in could perform here.

**Contact:** Stevan Micheo-Owner  
[news@micheomusic.com](mailto:news@micheomusic.com)

#### **3.3.2. Genre**

The Puerto Rican market is mainly based on Latin and Caribbean music such as reggaeton, jibaro, merengue and salsa.

#### **3.4. Touring structure**

In terms of transportation infrastructure, Puerto Rico has an excellent road network with many highways. The island is fairly small and is a 4-hour drive from one side to the other.

There is a range of accommodation available, from backpacking hostels (US\$ 25 per day) to 5-star hotels (US\$ 200 per day). The majority are on international booking platforms such as Booking.com.

While incidents and violent crimes are rare, some areas may be dangerous and should be avoided, as drug activity and robberies are more frequent. Many choose to avoid La Perla in Old San Juan, next to El Morro, which has a high rate of drug trafficking. The areas of Puerta de Tierra outside the hotel hub should also be avoided due to large amounts of drug activity and other criminal behavior. Parque de las Palomas, a park area in San Juan, should be avoided after dark. Ponce, in the south part of Puerto Rico, is another location where caution is needed. Finally, travellers also suggest avoiding public housing areas, known in Puerto Rico as "caserios", identifiable by their cement facades and apartment-like balconies. Gangs are known to populate these projects.

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## **4. PUBLISHING MARKET INFORMATION**

*Opportunities for Canadian Independent Music Companies in the Puerto Rican Market*

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# **4. PUBLISHING MARKET INFORMATION**

## **4.1. Collection societies regime**

The Puerto Rican performing rights organization (PRO) is called ACEMLA. It is one of 4 PROs operating in the United States, alongside SESAC, BMI, and ASCAP. It is also a member of CISAC, the international organization of PROs. As the Canadian PRO (SOCAN) is also affiliated with CISAC, there is no need for Canadian artists to register at ACEMLA if they already registered in their home country.

BMI and ASCAP also have offices in Puerto Rico and collect copyrights in Puerto Rico.

## **4.2. Sync Opportunities for English catalogues**

ACEMLA has a strong network thanks to its affiliation with the three American PROs. It has placed music in Coca-Cola and Scottex commercials and could be interesting for Canadian independent artists.

## 5. SECONDARY MARKET

### 5.1. Gaming

**“Puerto Rico has one of the most generous filmmaking tax incentive programs in the world, offering up to 90 percent in tax production credits on expenditures made to Puerto Rican residents or companies.”**

As of last year, Puerto Rico has one of the most generous filmmaking tax incentive programs in the world, offering up to 90 percent in tax production credits on expenditures made to Puerto Rican residents or companies. While the legislation was put in place with the idea of encouraging film development, Puerto Rico is also using it to encourage

growth of the local gaming scene, which is in the very early stages of development.

One of the larger operations in Puerto Rico right now is Space Rhino Games, developer of Breach TD and Breach Arena. The studio’s founder, Michael Hoyos recently told GamesIndustry.biz that the growth in the scene has been noticeable even since he launched his shop in 2014. According to him, the gaming industry has huge potential in Puerto Rico.

Although also incipient, this growing sector may represent an opportunity for Canadian music, especially for finding familiar international sounds at a lower cost.

Brands	Product	Event
Coors Light	Beer	Coors Light Indie Fest
Heineken, Ford, Johny Walker, Walmart, Delta	Beer, Car, Whisky, Retailer, Airline	Puerto Rico Heineken Jazz Fest
McDonalds, Banco Popular	Food, Banking	1er Día Nacional del Rock
Chivas Regal, Palo Ready Viejo, Don Q Excepcional, Tito’s handmade vodka, Medalla Premium Light	Whisky, alcoholic beverage, rum, vodka, beer	R.A.M.A.S Festival

### 5.2. Brand engagement

The graphic above depicts some examples of brand sponsorship Puerto Rican musical events: Finding a commercial partnership with a Canadian brand willing to enter or expand the Puerto Rican market could be an interesting opportunity for Canadian independent artists.

**opportunity for Canadian independent artists.”**

The Puerto Rican Culture Institute has a Music Division Service in charge of preserving the musical heritage of the island. They curate a vast programme of workshops, lectures, concerts and festivities throughout the year, with a focus on local music.

### 5.3. Other players

**“Finding a commercial partnership with a Canadian brand willing to enter or expand the Puerto Rican market could be an interesting**

Cluster de Música de Puerto Rico (Puerto Rico Music Cluster) brings together several domestic music associations, with the aim of encouraging growth in the country’s music industry. Established in 2015, they



have organised several conferences and events and are currently planning an independent music event called “El Circuito Musical”. Although they work primarily with domestic artists and bands, there might be some opportunities for Canadian independent artists at some of their events, such as the upcoming El Circuito Musical event.

**Contact:** <https://www.facebook.com/clustermusicapuertorico/about/>.

### 5.4. Publishing for recorded music

From our research, it seems independent artists and bands from Puerto Rico do not usually register their musical works with collective management associations. However, Puerto Rican artists with an international audience work with major foreign record labels and international agents.

### 5.5. Film, radio, gaming

**“Tourism is one of Puerto Rico’s most important industries, with visitors spending over US\$ 4 billion on the island in 2015 and an average hotel occupancy rate of 70%. Canadian independent artists could explore the possibility of partnering with international hotels on the island.”**

Due to the tax benefits provided to the film industry in Puerto Rico, many foreign production companies (mostly American but also European) are currently filming movies and TV shows on the island. Some of these companies include HBO, Disney and Fox. US\$ 90 million have been invested in the country through these means between 2015-2016.

Tourism is one of Puerto Rico’s most important industries, with visitors spending over US\$ 4 billion on the island in 2015 and an average hotel occupancy rate of 70%. The World Tourism Organisation has forecasted that by 2030, the Caribbean region, should be receiving over 30 million visitors per year, and this could mean an additional income for Puerto Rico of US \$ 250 million should the average occupancy rate be maintained. Canadian independent artists could explore the possibility of partnering with international hotels on the island in order to have their catalogue included in their musical programming.

## 6. MEDIA AND PR

**“There are some great contacts for Canadian Independent artists to explore, which range from large media platforms to ultra-specialized blogs.”**

### 6.1. How the PR market works

Radio, TV and the printed press continue to be great ways of promoting music. Although radio programmers, when pressed on their selection criteria, mention statistics, audience preferences and other criteria, it would seem that acts of bribery such as “the payola” are still commonplace. Puerto Rican radios mostly play foreign music.

### 6.2. Media and PR opportunities for Canadian content

There are some great contacts for Canadian independent artists to explore, which range from large media platforms to ultra-specialized blogs.

#### El Nuevo Dia

Elnuevodia.com has been the most visited domestic site in Puerto Rico for nine consecutive years, and it is the most visited domestic site on cell phones. El Nuevo Día is also the domestic press outlet with the most followers on social networks.

The printed version is the leading newspaper on the island. Being featured in the music section of the paper would give widespread exposure to Canadian artists on the island.

**Contact:** [apoyo@elnuevodia.com](mailto:apoyo@elnuevodia.com)  
**Website:** <http://www.elnuevodia.com>

#### Puerto Rico Indie

A blog that promotes independent artists, both domestic and international. Focuses on music and video content.

**Contact:** [info@Puertoricoindie.com](mailto:info@Puertoricoindie.com)  
**Website:** <http://puertoricoindie.com>

#### Sonando en Puerto Rico

This company is dedicated to indie Puerto Rican music, and finding the best underground music the island has to offer.

**Website:** <http://sonandoenpuertorico.com>

#### Alfa Rock

This radio station specialising in international and local rock music, with shows titled “Alfa Rock Electronico” and “Conduce Rock”.

**Contact:** <https://www.facebook.com/alfarock/>

#### Diálogo UPR (Universidad de Puerto Rico)

With 30k fans on Facebook and a regularly updated website, Dialogo UPR is especially popular amongst students. Its music section features a lot of international content.

**Contact:** [dialogodigital@gmail.com](mailto:dialogodigital@gmail.com) or  
[dialogo.digital@upr.edu](mailto:dialogo.digital@upr.edu)  
**Website:** <http://dialogoupr.com/>

#### La Marginal

A digital and print magazine that covers a wide range of alternative music, culture and art. Despite being a small magazine, it offers coverage on international acts as well.

**Contact:** [la.marginal.pr@gmail.com](mailto:la.marginal.pr@gmail.com).  
**Website:** <http://lamarginalpr.com/>

#### Tu Escena.tv

This is a digital audiovisual platform for indie and emerging Puerto Rican acts. Streams live performances of indie and urban Puerto Rican bands. Currently focusses on the local scene centered, but could be a great platform for foreign indie artists.

**Contact:** [envivodesdepr@gmail.com](mailto:envivodesdepr@gmail.com)  
**Website:** <https://www.facebook.com/tuescenatv/>

## 7. VISA SYSTEM, TAX WITHHOLDING POLICY AND OTHER PRACTICAL INFORMATION

As an unincorporated territory of the United States, Puerto Rico has no government body dealing with external affairs. It is therefore subject to US policy-making in areas such as foreign relations, trade, customs administration, immigration and emigration, nationality and citizenship, etc. This means that bands and their touring parties will have to go through US immigration authorities in order to get their visa before entering Puerto Rico.

Canadian citizens do not require O or P visas to enter the U.S., but they do require approval from the USCIS. Canadian permanent residents (landed immigrants) do require visas, as do all third-country nationals (those not from the U.S. or Canada) entering the U.S. from Canada.

### **Performing in the USA for Canadian citizens**

Canadian citizens need simply to present themselves at a port of entry or pre-flight inspection location with proof that USCIS has approved their O or P classification. If the petition has been approved, the computer system will contain a full record of that approval, but the best proof remains an I-797 Approval Notice.

### **Performing in the USA for Canadian residents**

Performing is considered as work — even if you're not making money — so you'll need a P2 work permit. You get one through the American Federation of Musicians (AFM).

You don't have to get a separate P2 for each band member or each crew member, but support people have to get their own work permit, a P2-S, and everyone has to complete an application form.

### **Validity of P2**

A P2 can be valid for up to one year and cover multiple dates and multiple border crossings, provided you've already got at least one gig for every 45 days during that period. However if your application lists your first gig as April 1 and your last as June 15, your P2 is only valid until June 15.

Unlike most people entering the U.S. to work, once you have a P2 you won't be asked by a U.S. border officer to provide financial information and letters explaining what work or service you'll be doing. Under a P2, the U.S. presenter becomes your employer.

### **Visa application - Guidelines**

A P2 can take up to 45 days to process, but it is preferable to allow even more time for processing.

A P2 is engagement-specific. As part of your application, you must provide contracts for your performances and a tour itinerary. If you want to add performances after acquiring a permit, you must inform the AFM as early as possible and submit your new contracts. Remember: if you play in venues that the USCIS hasn't been informed about, you're working illegally.

A P2 is only a work permit. You may need other visas to get into the U.S., particularly if you're a Canadian permanent resident. P2 applications for permanent residents take longer to process than those for Canadian citizens. Consult the AFM for more information.

You can't hold more than one permit at a time — one cancels out the other. For example, a student visa would automatically be suspended once you're approved for a P2.

Just because the USCIS has issued a P2 doesn't mean the border officer has to allow you into the U.S. If you're belligerent or in some other way break a rule, he or she has the authority to refuse you entry. Also, just because you have a P2 doesn't mean you won't be searched and scrutinized.

Make sure you have a valid passport or, if you're driving, a government-issued photo ID, such as a driver's licence, plus proof of citizenship, such as a birth certificate. A passport is the easiest way to go and will likely become a requirement at all land and sea ports in the next few years.

### **Cost**

The USCIS charges US\$325 to process a P2 application and an additional US\$325 for a P2-S for crew or dancers. If a gig comes up on short notice, or if you didn't get your paperwork together in time, you can pay an additional US\$1,225 that guarantees processing within 25 days.

Only AFM members may apply for work permits through the AFM. Membership dues vary from local to local, to a

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## 7. VISA SYSTEM, TAX WITHHOLDING POLICY AND OTHER PRACTICAL INFORMATION

### *Opportunities for Canadian Independent Music Companies in the Puerto Rican Market*

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maximum of around \$250 annually per person — much less expensive than going through a customs broker, a U.S.-based visa service company or an immigration lawyer. The AFM charges a processing fee of \$100 for the first musician on a P2, plus \$20 for each additional musician. If a band needs a P2-S for their essential personnel as well, the processing fee is \$100 for the first crew member, plus \$20 for each additional crew member.

#### **Complementary information**

Artists and entertainers who want to come to the US to perform or exhibit their talents in the US have a range of US visa options to choose from. The key is to choose the best option that matches the artists' or entertainers' talents and purpose of the trip. Thus, while the O-1 visa would allow an artist or entertainer admission into the US for a period of up to 3 years initially, the eligibility criteria prescribed for the O-1 is a very high standard, beyond the reach of many amateur or young artists and entertainers. The eligibility criteria for P-visas, on the other hand, is not set as high as the O-1 visa. However the P1 visa is not available to individual artists and entertainers, while the P2 visa is limited to only those artists, entertainers and groups performing under a reciprocal exchange program. The P3 visa is limited to artists and entertainers performing under a culturally unique program, like Irish dance or Sufi musical performance, etc. While the B1 visa does not require a prior approval of petition by the USCIS, its applicability is limited to certain select situations, and it is not suitable for the vast majority of professional artists and entertainers.

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“It is a long tradition all over Belize for celebrations to begin at the beginning of September and continue through Independence Day, extending festivities to almost three weeks.”

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# BELIZE

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## OVERVIEW

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**“[Belize] is the only country to have obtained full membership to the two regions’ biggest organisations: CARICOM (Caribbean Community), CELAC (Community of Latin American and Caribbean States), and SICA (Central American Integration System).”**

Belize is a multifaceted country, a melting pot of languages and cultures that reflect its history. Whilst over 50% of the population is multilingual, English is the official language. Due in part to its geographical position, it is considered both a Caribbean and Central American nation, with strong ties to both regions. It is the only country to have obtained full membership to the two regions’ biggest organisations: CARICOM (Caribbean Community), CELAC (Community of Latin American and Caribbean States), and SICA (Central American Integration System).<sup>1</sup>

### MUSIC ECOSYSTEM

The Music Industry Association of Belize (MIAB) is Belize’s foremost industry association. Established in 2002, MIAB has been fully operational since 2005, with some 12 diverse music organisations as its registered members. These include the Music Teachers Guild, Musicians for Belizean First and recording studio Stonetree Records. In spite of limited technical assistance and having to operate on shoestring budgets, MIAB operates as the umbrella body to local music organisations. It is primarily concerned with the development and sustainability of music and the music industry in Belize. To this end, the association is primarily focused on providing an enabling environment and annually hosts a “Music Week”, which comprises an Awards Ceremony as well as educational workshops primarily targeted at deepening the capacity and professionalism of Belizean artists.

MIAB has been able successfully lobby the Belize Government to make the importation of musical equipment duty free. In addition, the association is currently working on lobbying the tourism industry to incorporate music into their marketing strategy, as is done by the Jamaica Tourist Board: and to institute fiscal concessions to hotels and promoters who hire local musicians.<sup>2</sup>

Streaming services available in Belize are Apple Music, iTunes, and Deezer (IFPI 2016 report).

Despite the industry making big strides in the last decade, Belize is still a tough prospect for international bands. The country has a handful of festivals that might be worth considering. The Belize International Jazz Festival<sup>3</sup> booked over 150 artists in 2015, including international acts<sup>4</sup>.

It is a long tradition all over Belize for celebrations to begin at the beginning of September and continue through Independence Day, extending festivities to almost three

weeks. Many concerts and events are organised to coincide with this period<sup>5</sup>.

### Belize Music World:

<http://www.belizemusicworld.com/About.html>  
Belizean music offering digital distribution.

### Roots & Honor Records

<http://rootsandhonor.com/about-belize-music/>  
Independently owned and operated record label based out of Belmopan, producing Belizean music.

### Stone Tree Records

<http://www.stonetreerecords.com/music/albums.php>  
Publishing and distribution for domestic and international artists.

### CONTACTS

Ivan Duran, director of Stone Tree Records and MIAB  
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Belize International Jazz Festival: <https://www.facebook.com/Belize-International-Jazz-Festival-1466155353623702>, [belizeinternationaljazzfest@gmail.com](mailto:belizeinternationaljazzfest@gmail.com)

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# BOLIVIA

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## OVERVIEW

Bolivia is one of the poorest countries in Latin America, although it is progressively enriching itself thanks to newly found gas reserves<sup>6</sup>. The country's GDP is 30.6 billion USD, with a population of 10.67 millions inhabitants (2013)<sup>7</sup>. Internet coverage is still limited, although mobile 3G coverage is available. The main digital music services are available: Apple Music, Deezer, Google Play, iTunes, Napster, Spotify and Viva. Despite this array of options, the country ranks in the lowest position among global music markets (61st out of 61 countries), according to IFPI's Global Music Report<sup>8</sup>.

The past decade has seen a proliferation of music piracy that has fragmented the potential of the music market in the country. On top of that, music sales in Bolivia have traditionally been low, and music is seen as a part of after-dinner entertainment<sup>9</sup>. Because of the minimal revenues in recorded music sales, international record labels are not present in Bolivia. The Bolivian public has veered toward single - rather than album - purchases, which has impeded the growth of physical distribution networks<sup>10</sup>.

### MUSIC ECOSYSTEM

The music industry is showing signs of development, with scenes developing in La Paz, Cochabamba and Santa Cruz. In 2015, the digital distribution company The Orchard signed an agreement with six Bolivian labels to distribute their music through global digital channels. Since 90 per cent of Bolivian music is self-published, this is encouraging artists to sign with labels and license their music<sup>11</sup>. Local artists are sceptical of joining a collection society, since domestic royalties collection is not enforced and therefore only appeals to acts with international distribution. SOCAN has reciprocal agreements with SOBODAYCON, the Society of Bolivian Music Authors and Composers.

Whilst streaming services are more profitable than digital downloads, the figures on most-played songs are those of an emerging market. Spotify's most popular hit currently has 6,000 plays, and the site's 50 viral tracks include English-speaking hard rock, rock and indie pop-rock acts, genres which differ widely from the Latin-oriented Top 50 chart.

As for the live scene, no commercial music festivals are in place in Bolivia, despite plans on developing an international, state-owned music festival in Cochabamba<sup>12</sup>. Bolivian mainstream audiences enjoy upbeat music, probably due to the influence of their traditional folkloric music and culture of dancing. The electronic scene is growing as a number of local DJs and producers are promoting independent dance events. Local indie acts promote their music on Youtube, from hip hop to techno-pop, reggae and metal. Although there is online evidence of an underground rock and post-rock scenes, they are mostly anecdotic, since the most popular ensembles are cover bands<sup>13</sup>.

Bolivia's music industry infrastructure will develop in the near future with the aid of foreign companies and

investment. As for now, research concludes there are little to no business opportunities for Canadian independent bands in Bolivia, at least through traditional methods.

### CONTACTS

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**“Because of the minimal revenues in recorded music sales, international record labels are not present in Bolivia.”**



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# ECUADOR

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# OVERVIEW

**“Since the growth in interest in foreign pop music, the Ecuadorian government has enforced a law which obliges radios to broadcast Ecuadorian music as at least 50% of their programs.”**

Ecuador has a population of 16 million inhabitants<sup>14</sup>. In the last 20 years, there has been a huge increase of musicians due to the growth of music schools and venues in which to perform. However, studio time remains prohibitively expensive for most people. With the rise of the Internet, Ecuadorians now have immediate access to foreign music (especially from Mexico, Spain and the USA), with mainstream hits produced by majors proving to be the most popular<sup>15</sup>.

As for music sales, Ecuador ranks in the very last position in physical sales (51st out of 51 countries) and in one of the lowest positions for digital sales (46 out of 53 countries)<sup>16</sup>. These figures can be partly attributed to the high level of CD piracy in the country (84% of the music consumed was pirated in 2014<sup>17</sup>).

## MUSIC ECOSYSTEM

Since the growth in interest in foreign pop music, the Ecuadorian government has enforced a law which obliges radios to broadcast at least 50% of Ecuadorian music in their programs. The Payola<sup>18</sup> is still a common practise. Pop and reggaeton are the most popular genres played on the radio, whilst rock music is hardly played, despite being in high demand amongst the Ecuadorian public<sup>19</sup>. The recent rise of experimental music from artists such as Nicola Cruz could pave the way for an increased interest in electronic music as well. Remezcla.com, considered the most influential media brand for Latino millennials with readership extending to the US, Latin America, and Spain, suggests that Ecuador’s burgeoning and underrated indie music scene is one of the main reasons to visit<sup>20</sup>.

According to IFPI<sup>21</sup>, the legal online services in El Salvador are, Apple Music, Claro Musica (which is a South American music streaming platform) Deezer, Google Play Music, Groove Music Pass, Itunes, Napster, and Spotify.

Based in Guayaquil, Banana Booking is a domestic and international booking agency that could be relevant for Canadian artists, as they work for national and international performers<sup>22</sup>.

However, touring Ecuador involves some risks. Contracts between promoters and performers tend to be unclear, and there have been instances where artists have been left out of pocket<sup>23</sup>.

The QuitoFest could be an interesting opportunity for independent Canadian artists. It focuses on independent music and showcases international artists every year.

Although smaller, El Carpazo Festival, also in Quito, could work for some Canadian indie artists<sup>24</sup>.

## CONTACTS

QuitoFest: <http://www.quitofest.com/contactos.html>

El Carpazo: <https://www.facebook.com/pg/elcarpazo/about>

Banana Booking: (593) 4269 3206. Ask for Oscar Almeida.

SAYCE (Sociedad de Autores y Compositores Ecuatorianos): (593) 2333 0160

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**“In the last 20 years, there has been a huge increase of musicians due to the growth of music schools and venues in which to perform.”**



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# EL SALVADOR

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**“Although Salvadorans tend to listen mostly to music in Spanish, El Salvador has thriving heavy metal, reggae, ska, dubstep, punk and electronic dance scenes.”**

El Salvador is the smallest and the most densely populated country in Central America. Its population of approximately 6.38 million consists largely of “Mestizos” of European and Indigenous American descent<sup>25</sup>.

Although Salvadorans tend to listen mostly to music in Spanish, El Salvador has thriving heavy metal, reggae, ska, dubstep, punk and electronic dance scenes, which can be attributed to a large quantity of venues and local bands. The capital, San Salvador, has also become a frequent touring destination for international bands, which has resulted in an

increase in concerts in the country<sup>26</sup>.

The Central American and Caribbean regions, including El Salvador, rank in a very low position when it comes to music sales (49th out of 51 countries in physical sales and 37th out of 53 countries in digital sales), with under 1% of global revenues<sup>27</sup>. CD piracy in the region is very high, which can explain this phenomenon.

## MUSIC ECOSYSTEM

The most popular genres in El Salvador are cumbia, hip hop, salsa and reggaeton. Local music is promoted through many different avenues. Promusica, one of the main Salvadoran promoters, hosts regular award ceremonies promoting domestic music<sup>29</sup>.

# OVERVIEW

Apple Music, Claro Musica (a South American music streaming platform), Deezer, Google Play Music, Groove Music Pass, iTunes, Microsoft Music Store, Napster, Spotify and TigoMusic are all available in El Salvador<sup>30</sup>.

Following global trends, the Salvadoran public is much more inclined to buy singles than albums. Digital sales are much higher than physical sales (the Central America and Caribbean regions receive 73% of their music revenues from digital sales<sup>31</sup>).

The Salvadoran collections organisation is the Sociedad de Autores, Compositores e Interpretes Musicales de El Salvador (SACIM). As SACIM is part of the international organization CISAC, Canadian artists will not need to register with SACIM if they already registered with SOCAN<sup>32</sup>.

Independent Canadian artists may find opportunities at IsmoFest<sup>33</sup>, El Salvador Jazz Festival<sup>34</sup> or GenNowFest<sup>35</sup>, who all regularly book international artists. La Casa Tomada del Centro Cultural de España, Museo Marte and Museo de Antropología David J. Guzmán<sup>36</sup> are cultural centres that act as venues to a large amount of concerts per year. Indie Music Collective is an indie music platform that organises regular concerts and festivals and works with municipalities, cultural centers and brands. However, bands from San Salvador and from neighbouring countries tend to receive preferential treatment from these initiatives<sup>37</sup>.

AFIMES, the Association for the Promotion of the Music Industry of El Salvador, organizes regular music industry talks, training courses, workshops and showcases. However, it seems that all these activities don't travel through the Latin American market and are restricted to San Salvadorans. However, the association was present at LAMC 2016 (Latin Alternative Music Conference), held in NYC<sup>38</sup>.

## CONTACTS

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Ismofest: <http://istmomusic.com/contact>

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[info@festivalsonika.com](mailto:info@festivalsonika.com)

GenNowFest: <http://gennowfest.org/>

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Indie Collective:  
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SACIM : + 503 2260 7469

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## “Bands from San Salvador and from neighbouring countries tend to receive preferential treatment.”

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# GUATEMALA

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**“The most important music festival in Guatemala is the Empire Music Festival, a music event that books international artists and drew 15,000 to its latest edition.”**

The Republic of Guatemala is a Central American country with an estimated population of around sixteen million people. It is considered one of the poorest countries in Latin America, with a poverty rate of 59.3%<sup>39</sup> (2014). As with other countries in the region, Guatemala faces many social problems related to poverty and unequal income distribution.

The capital, Guatemala City, is the most inhabited part of the country, with a population of more than four million inhabitants in its metropolitan area.

## MUSIC ECOSYSTEM

Guatemala is one of the biggest music markets in Central America, and has a diverse music scene. Popular genres include Caribbean rhythms such as bachata, tropical salsa, cumbia and merengue as well as rock, pop, electronic, hip hop, rap or the local marimba. Urban music or reggaeton is gaining a strong position in the Guatemalan market. Foreign music is commonplace, with international pop stars like Ed Sheeran and Lauv being found at the top of Spotify’s Viral 50 tracks<sup>40</sup>.

All of the main streaming and download platforms are available: Apple Music, Claro Música (streaming platform available in Central and South America), Deezer, Google Play, Groove Music Pass (subscription to Microsoft’s streaming service), iTunes, Microsoft Music Store, Movistar (telephone operator that also offers music services to its

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# OVERVIEW

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clients), Napster, Spotify and Technics Tracks (download service that specialises in high quality lossless audio)<sup>41</sup>. The percentage of Internet users in 2015 was low, only 27.1%<sup>42</sup>, with most users being young and living in the city<sup>43</sup>.

The Guatemalan music industry is underdeveloped, and local musicians find it hard to make a living from their profession. Despite the growth of the Guatemalan creative industries, whose revenue in 2016 grew around 10%, reaching 14 million US dollars<sup>44</sup>, the music industry is in its infancy and hasn't implemented the structural procedures to allow it to grow. The media, especially radio stations, do not afford much coverage to domestic independent and alternative artists.

The Guatemalan collecting rights society is called Asociación de Autores, Editores e Intérpretes (Association of Authors, Publishers and Performers) and is a member of CISAC.

The most important music festival in Guatemala is the Empire Music Festival, a music event that books international artists and drew 15,000 to its latest edition. International acts booked in 2016 included Skrillex, Incubus and Zedd. The lineup for the 2017 edition, which will take place in March, has already been announced, featuring artists such as Wiz Khalifa, DJ Snake, Marshmello, Juanes, Fifth Harmony and Richie Hawtin, alongside emerging talent. Prices for the 2017 edition start at 520 Guatemalan quetzal (around 90 Canadian dollars) for a single day pass. Empire Music Festival might represent the best chance a Canadian independent act has to enter the Guatemalan market. Website: <http://empiremusicfestival.com/17/>

Semana de Música Avanzada (Advanced Music Week) is also worth looking into, with a programme of exhibitions, talks, workshops, conferences, cinema, concerts and parties. It focuses on electronic and experimental music. More than twenty Guatemalan and international artists were booked for their 2016 edition.

Lobo Negro Records, apart from being an independent record label, also organises Lobo Negro Showcase, a label showcase.

Massivo Records specialises in artist management, production and public relations. They act as managers and booking agents for several important artists not only in Guatemala but also in the whole Central American region.

Bajo Presión Records is one of the most important Guatemalan independent record labels. They cover a wide range of musical genres, from rock to folk, indie, hip hop, ska and gypsy/folk. They also work in Costa Rica, and their aim is to improve the touring structure and the promotion of their artists all over Central America.

## CONTACTS

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**“Despite the growth of the Guatemalan creative industries, whose revenue in 2016 grew around 10%, reaching 14 million US dollars, the music industry is in its infancy and hasn't implemented the structural procedures to allow it to grow.”**

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# GUYANA

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# OVERVIEW

**“It’s also important to notice that internet has a low penetration, as only 38.2% of its population is an internet user.”**

Guyana, officially known as the Co-operative Republic of Guyana, was a British colony until 1966, and English is still its official language. Although located in northern South America, it is included in the Caribbean Region. It is the third smallest country in South America<sup>45</sup>.

Guyana has a population of 767,085 inhabitants and a GDP of US \$ 3.166 Billion <sup>46</sup>. Its economy has been moderately growing in recent years. It has one of the highest skilled workers emigration rate in the region, as more than 55% of Guyanese citizens live abroad. It’s also important to notice that internet has a low penetration, as only 38.2% of its population is an internet users<sup>47</sup>.

## MUSIC ECOSYSTEM

Like other South American countries, there is a prominent music piracy problem in Guyana. Current copyright infringement laws are 50 years out of date and do not take into account the advent of CDs and DVDs, let alone MP3 and downloads<sup>48</sup>. Artists suing for infringement rarely win their cases and, if they do, fines are minimal. This is causing huge damage to domestic independent artists. The most commonly pirated releases are those of international mainstream acts, making independent products seem more expensive.

Guyanese artists are struggling to break through in their own country, partly because of the lack of copyright registrations<sup>49</sup> and the fact that radio DJ’s promote other Caribbean artists rather than local ones<sup>50</sup>. Promoters also invest in bringing internationally acclaimed artists to Guyana<sup>51</sup>. Due to Guyana’s high migration rate, there’s a lot of successful artists living abroad who are Guyanese born or descendent, such as Blood Orange or Eddy Grant. Recently, some initiatives such as Golden Children<sup>52</sup> and the Guayana Music Network, which seek to develop the Guyanese music industry, have been launched. For instance, the George Town Chamber of Commerce and Industry is helping with export development plans in collaboration with the Guyana Music Export<sup>53</sup>.

Golden Children is a project created because of the 50th Anniversary of Guyana. It consists of a musical compilation of Guyanese artists that includes a wide range of genres, not just soca and dancehall. The producer of the project, Jonathan Beepat of Wildfire Productions, said in the Guyana Chronicle: “We are trying to stretch into contemporary genres with more modern music and mainstream music that we can market to the world<sup>54</sup>”.

This would be a great connexion to explore for Canadian independent artists.

Guayana’s musical roots are a mixture of Caribbean Music. Radio stations play local music during Mashramani, a festival that celebrates Guyana’s Independence<sup>55</sup>. Other typical Guyanese festivities include Divali, Independence Day (where an arts and music festival is held at the National Stadium in which Jazz, Reggae, Chutney, Calypso and Soca bands perform) and Phagwah. Music talent castings are also common in Guyana

Please note the spelling changes on Phagwah as well. Move the 56 footnote somewhere less distracting. Depending on what it applies to, you could put it immediately after ‘Independence Day’

Guyana doesn’t appear in the IFPI legal online<sup>58</sup> services or on Spotify maps. Despite that, it’s obvious that in Guyana, there isn’t the language barrier that occurs with its neighbouring countries. As we can observe in the Guyana Times list of Top Songs<sup>59</sup>, mainstream music is well extended into the country.

**“Like other South American countries, there is a prominent music piracy problem in Guyana.”**

Currently, Guyana lacks the framework needed to support a sustainable music industry, including a mix of venues to facilitate touring. Venues that previously fulfilled this role have become increasingly reliant on DJs and electronic music<sup>60</sup>. The Pegasus and Marriott are really the only notable live music venues.

Kindred Republic is an independent record label and studio from Guyana that works with hip hop, latin and mainstream sounds that is seeking international collaborations<sup>61</sup>. Kross Kolor Records, founded by Simon Burchmore, who also launched Guyana Music Network<sup>62</sup>, has a wide range of genres in its roster (soca, rock and pop). Vizion Sounds Records is another independent label with a passion for reggae music.

Guyana Music Network organises music industry stakeholder meetings and showcases. Its mission is to promote the sustainable development of the music industry<sup>63</sup>, although it currently does not have an international remit.

A very good partnership to access the Guyanese market would be through the Guyanese Canadian Artistic Inc. This company was founded by the Guyanese promoter Sherlock Shepherd, who is established in Canada. This is also why he has organised the Guyana

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# OVERVIEW

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International Artistic Music Awards both in Guyana and Canada. The showcase event promotes Guyanese talent internationally<sup>64</sup>. We consider that both his Canadian location and his knowledge of the Guyanese market make this contact valuable and worth being taken into account.

## CONTACTS

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Vizion Sounds Records:

<http://www.vizonsoundsrecords.com>

Kindred Republic:

<https://www.facebook.com/kindredrepublicive>

Pegasus:

<http://www.pegasushotelguyana.com>

Marriot:

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**“Currently, Guyana lacks the framework needed to support a sustainable music industry, including a mix of venues to facilitate touring.”**



“ Industries and infrastructure are mostly located in the central and northern regions of the country.”

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# HONDURAS

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# OVERVIEW

**“Due to limited internet access and a prevalent DIY culture, independent record labels were hard to come by.”**

Honduras is located in Central America. It has a total population of just over 8 million inhabitants and a GDP of 20.4 billion USD. It is the second poorest country in Central America and characterised by its economic inequality and high murder rate. Industries and infrastructure are mostly located in the central and northern regions of the country. It is an exporter of natural resources such as coffee and minerals, as well as textile and automobile wiring, and its economy relies heavily on trade with the US.

2% of Hondurans have fixed internet access and 17% have mobile internet access (CONATEL).

## MUSIC ECOSYSTEM

Apple Music, Claro Musica (a South American music streaming platform), Deezer, Google Play Music, Groove Music Pass, iTunes, Microsoft Music Store, Spotify and TigoMusic are all accessible in Honduras.

The Spotify Top 50 list consists of reggaeton and some Latin international artists mixed with international western pop stars such as Ed Sheeran, Justin Bieber, Major Lazer, Bruno Mars and Drake.

Music plays an important role in Hondurans' daily life and is present in all their activities. However, radio stations and restaurants often ignore royalty payments to the Society of Authors, composers, Musicians and Interpreters Of Honduras (AACIMH).

There is an alternative live scene in Honduras, with a crop of festivals springing up around the country. Nu Festival Alternativo, now in its third edition, books lineups composed of emerging indie and electronic Central American bands. It's held in the Museo Para La Identidad Nacional de Honduras.

Madrugada Hostel, which is located in San Pedro Sula and has recently created its own indie festival, is supporting indie emerging artists from Honduras and organises a large number of concerts.

Hope and Treat Festival is another small indie festival that hosts concerts in Cien Años Cultural Center in Tegucigalpa. Cien Años Cultural Center seeks to promote artistic life in Honduras and has several entertainment spaces catering to an array of audiences and genres.

Acoustic and alternative music shows take place at bars such as Kaldis Koffee Shop and cultural centers such as Museo Para la Identidad Nacional de Honduras and Centro Cultural de España en Tegucigalpa. The programme is heavily skewed toward Latin American bands. Spanish language artists perform at Centro Cultural de España, too. There are very few opportunities for Canadian independent artists, since the live international music scene in Honduras is mostly made

of electronic techno and house music festivals (Electronic Annual Gathering, Electricque Rave, Electronic Experience Festival and Sunjam, to name a few).

Due to limited internet access and a prevalent DIY culture, independent record labels were hard to come by. There are a few independent record labels (DOS M, Costa Norte Records), but they do not have any international acts on their roster. DOS M is linked to the NU Alternative Festival and its roster is composed of indie rock and electronic bands. Costa Norte Records is the first independent record label based in Honduras committed to world music Central American and Honduran artists.

## CONTACTS

Nu festival Alternativo:

<http://www.nufestival.com/>

Madrugada Hostel Festival : (504) 2569-6085.

They also program other concerts here.

Hope and Treat Festival: Cien Años Venue  
(Festival location) <https://www.facebook.com/events/140713889729291>, [cienanioshn@gmail.com](mailto:cienanioshn@gmail.com)

Museo para la Identidad Nacional de Honduras:  
[info@min.hn](mailto:info@min.hn)

DOS M:

<https://www.facebook.com/dosm.hn/>

Costa Norte Records:

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# NICARAGUA

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# OVERVIEW

## “The musical scene is mostly concentrated around the capital city, Managua.”

Nicaragua is a Central American nation with a population of 6,082,032<sup>74</sup> inhabitants and a GDP of 12,6 Billion USD<sup>75</sup>. It is one of the poorest countries in Latin America and relies heavily on agricultural exports and tourism.

Nicaragua has one of the lowest Internet access percentiles in Central America<sup>76</sup>. It is not surprising therefore, that the percentage of internet users, is low (19.7%)<sup>77</sup>. However, this is slowly getting better<sup>78</sup>. Apple Music, itunes, Claro Musica (a South American streaming platform), Movistar, Deezer, Napster, Spotify and Google Play are all available in Nicaragua.

### MUSIC ECOSYSTEM

The Nicaraguan Viral 50 Spotify list includes many Latin and international stars, like Ed Sheeran, The Weeknd, Zara Larsson, Black Beatles, John Legend, Lady Gaga, Alt-J and Maroon 5<sup>79</sup>. In general, people from Nicaragua enjoy a wide range of South American and Caribbean genres as well as international artists.

According to the Organization of IberoAmerican States<sup>80</sup>, the music industry in Nicaragua is in a precarious position. In general, indie and alternative Nicaraguan bands and artists self publish their records and manage their own careers. There are very few independent record labels for alternative artists. Nicaraguan artists don't expect to earn money by selling physical or digital sales, but they seek to promote themselves through the internet in order to gig abroad. Although the technical infrastructure is increasingly growing, there are no proper mastering studios<sup>81</sup>.

The musical scene is mostly concentrated around the capital city, Managua. Feria del Disco Nicaragua (Nicaragua's Label Fair) is a large event showcasing dozens of Nicaraguan bands. It is broadcasted and promoted by TN8 TV Channel. Although the predominant genre is rock music, it covers some other genres, such as pop and indie.

Somar Sunset Music Fest is a reggae, alternative and electronic music festival that takes place at Salinas Beach. The programme has a focus on domestic acts.

The Association of Authors in Nicaragua (NICAUTOR) is not known as a reliable royalty collecting organisation<sup>82</sup>. A change of administration has taken place, but we have been unable to verify the current situation.

Centro Cultural de España en Nicaragua (Spanish Cultural Center in Nicaragua, CCEN) organises regular

Spanish-speaking showcases, concerts, talks and cultural workshops. They also host Project Emerge, which is an initiative that seeks to improve Nicaraguan bands through workshops with international artists such as Miguel Bosé and monthly concerts<sup>83</sup>.

### CONTACTS

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Centro Cultural de España en Nicaragua:  
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[programacion@ccenicaragua.org](mailto:programacion@ccenicaragua.org)

## “In general, indie and alternative Nicaraguan bands and artists self publish their records and manage their own careers. There are very few independent record labels for alternative artists.”

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**“The percentage of Internet users in the country in 2015 was 44.4%, with most of these users located in the urban areas.”**



**“Paraguay is famous in the South American region for hosting several important electronic festivals and parties...”**

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# PARAGUAY

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**“Rock music is also important in Paraguay and enjoys good support from national media.”**

The Republic of Paraguay is located in central South America and has a population of around 6.8 million inhabitants. One of Paraguay’s distinctive features is its Indigenous language and culture, Guaraní, which is still widely spoken and, alongside Spanish, is the country’s official language. Despite dealing with significant poverty issues (as with most countries in the region), Paraguay has been enjoying an important economic growth in recent years, with an average rate of 5%<sup>84</sup>.

The capital, Asuncion, has a population of more than a half million inhabitants. Including the city’s metropolitan area, the area accounts for more than a third of the country’s population<sup>85</sup>.

## MUSIC ECOSYSTEM

As in the rest of the world, physical format music sales in Paraguay are decreasing, and the digital formats (streaming and downloads) now represent more than 50%<sup>86</sup> of the music income in the country. All the main streaming and download platforms such as Deezer, Spotify, Apple Music,

**“In recent years financial issues between APA and the authors have arisen, with several APA managers officially accused of stealing money from the entity , causing a delay in the industry’s development.”**

Google Play, Groove Music Pass (subscription to Microsoft’s streaming service), iTunes, Microsoft Music Store, Personal (South American telephone operator that also offers music streaming and download) Tigo (telephone operator that also

## OVERVIEW

offers music services) and Claro Música (streaming platform available in Central and South America) are available<sup>87</sup>. The percentage of Internet users in the country in 2015 was 44.4%, with most of these users located in the urban areas<sup>88</sup>.

The music industry in Paraguay is quite undeveloped. The national author's rights collecting society is Autores Paraguayos Asociados, APA, member of CISAC. In recent years, financial issues between APA and the authors have arisen, with several APA managers officially accused of stealing money from the entity<sup>89</sup>, causing a delay in the industry's development. This situation seems to be slowly improving, and the music industry is starting to grow, as shown by the return of Sony Music to the country and the birth of new companies such as Random Sounds, a digital distribution firm that also provides other services, such as copyright registration or musical videoclip production. Many new domestic bands and artists are emerging and gaining popularity among the Paraguayan audience.

Cumbia and Latin Pop are widely listened to in the country. Rock music is also important in Paraguay and enjoys good support from national media. Spotify's 50 viral tracks<sup>90</sup> show that the audience also enjoys listening to foreign music, especially Western, whereas the Top 200 chart<sup>91</sup> shows a more Latin-oriented focus.

Paraguay is famous in the South American region for hosting several important electronic festivals and parties, such as Life in Color, the world's most important paint party. It has been celebrated in Paraguay since 2014, with artists such as Alesso and Alok taking part in its 2016 edition. Other festivals include Illusion Music Fest, which had two editions and hosted shows by important international DJs such as Hardwell, DVBBS and David Guetta; Road to Ultra, a one-day single stage event with acts such as Markus Schulz and Jauz; and the Creamfields Festival, which arrived in Paraguay for the first time in 2016 with acts such as Chic Floyd or Guy Gerber.

Kilifest is an important independent music festival that has taken place since 2014. It is organised by G5 Pro, one of the country's most important show promoters. In 2016, the promoters booked top international acts Kaiser Chiefs and The Ocean Blue.

Until last year, there were no relevant music industry gatherings in Paraguay. In 2016, the first Simposio de Música (Music Symposium) took place, including conferences, round tables and live shows by national and international artists. Attendees included Paraguayan music professionals and also counterparts from Argentina, Mexico, Uruguay and Brazil. It is expected to take place every two years and could be a good opportunity for Canadian independent artists to access the Paraguayan music sector.

**“Paraguayan music professionals usually travel to the other South American trade events and industry conferences in nearby countries such as Argentina, Brazil and Colombia.”**

Paraguayan music professionals usually travel to the other South American trade events and industry conferences in nearby countries such as Argentina, Brazil and Colombia. They have taken part in IMESUR, MICSUR and CIRCULART. Attending one of these big international events could be a good way for Canadian independent artists or industry professionals to generate and promote business with Paraguay.

Kamikaze Records is a label founded in 1999. It also provides digital distribution services and has become an important show and artistic event producer. Contact: Willy Suchar, founder and director.

### CONTACTS

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Kamikaze Records: [Willy Suchar, Founder and Director, https://www.facebook.com/kamikazerecordspy/](https://www.facebook.com/kamikazerecordspy/)

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# SURINAME

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**“The Surinamese music industry is very underdeveloped both in terms of infrastructure and research. Most of the scene is localised around the capital Paramaribo.”**

Suriname is the smallest country in South America and has a population of approximately 560,000. It is one of the most ethnically diverse countries in the Americas. Most of its people are descended from African slaves and Indian and Indonesian indentured servants brought over by the Dutch to work as agricultural labourers<sup>92</sup>.

Surinamese music is represented by musical groups such as Fra Fra Bigband, an orchestra from Paramaribo that blends indigenous forms of kaseko (dance music

combining Western march, jazz, and calypso), kawina (a type of Creole pop music), and winti (ritual music) to form a distinctly Surinamese brand of Afro-Caribbean jazz. In recent years, Suriname-based groups have also collaborated with Western African musicians, adding talking drums and thumb pianos (lamellaphones) to their instrumentation<sup>93</sup>.

## MUSIC ECOSYSTEM

The Surinamese music industry is very underdeveloped both in terms of infrastructure and research. Most of the scene is localised around the capital Paramaribo. Musical instruments are very expensive and music studios have little experience in multiple genres<sup>94</sup>.

# OVERVIEW

Despite internet access being common and widely available in the major cities<sup>95</sup>, access to music streaming and downloading platforms is severely limited, with iTunes<sup>96</sup>, Spotify<sup>97</sup>, Deezer<sup>98</sup> and Google Play<sup>99</sup> all unavailable.

There are some non-profits and foundations working to develop the industry, such as the Kibii foundation. A non-governmental organization with a focus on arts and culture development and promotion. It is the only existing cultural and arts centre in the Marowijne region of the country. The Dutch fund Prince Claus has also supported Surinamese cultural development projects<sup>100</sup>.

The live scene has a handful of commercial music festivals, including the Wacken Metal Battle Caribbean, held in Paramaribo, Suriname. The first edition was held in April 2016, with established metal bands from around the Caribbean being booked<sup>101</sup>.

The Kibii Foundation also hosts the Moengo Festival of Music in Marowijne<sup>102</sup>. Held in September, the festival attracted large crowds and had a varied programme of concerts, workshops, and studio sessions<sup>103</sup>.

Suriname can count on strong Caribbean ties to bolster its trade partnerships and cultural development projects. Suriname is a regional borrowing member of the Caribbean Development

Bank<sup>104</sup> and member of CARICOM<sup>105</sup>, CCIMU<sup>106</sup> and Carib-Export<sup>107</sup>. With the Caribbean poised to invest heavily in the creative industries<sup>108,109</sup>, Suriname is in a good place to benefit from this promotion.

## CONTACTS

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Moengo Festival:  
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# URUGUAY

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**“The country has the second highest music revenue per capita in South America.”**

Uruguay is in the southeastern region of South America, neighbored by Argentina and Brazil. Uruguay has 3,431,555 inhabitants<sup>10</sup>. Montevideo, its capital city, is the most populated city in the country. It is the second-smallest nation in South America after Suriname. Uruguay is a Latin American democratic country<sup>11</sup> with low corruption rates.

**“In Uruguay, a fee has to be paid to the state for public domain use.”**

## MUSIC ECOSYSTEM

**“Despite being a small country, Uruguay has a distinct appetite for international indie music.”**

Uruguay ranks in 46th position in physical global revenues and 51th position in digital global revenues. Streaming overtook downloads in 2015, and the country has the second highest music revenue per capita in South America<sup>12</sup>.

In 2015, recorded music revenues by sector were as follows: 68% performance rights, 23% physical sales and 9% digital sales. In 2015, the total revenue for recorded music increased 16.1% compared to the previous year.

## OVERVIEW

From 2014 to 2015, physical sales revenues decreased from US\$ 1.8 Million to US\$ 1.6 Million, digital sales increased from US\$ 0.2 to US\$ 0.6 Million and performance rights revenues increased from US\$ 3.8 to US\$ 4.6 Million.

A recent study by the British company NetNames revealed that piracy is widespread in Uruguay<sup>113</sup>.

The main collecting society in Uruguay is AGADU (General Association of Authors in Uruguay). AGADU has an agreement with SUDEI (Uruguayan Society of Performers) and CUD (Uruguayan Chamber of Records) to collect revenues as a one-stop shop<sup>114</sup>. In Uruguay, a fee has to be paid to the state for public domain use. This fee is fixed by CDA (Copyright Council), and it goes to the promotion of culture through FONAM (National Music Fund), COFONTE (National Theater Fund) and MEC funds<sup>115</sup>. AGADU charges an administrative percentage on its collection duties.

Spotify's most played artists include western pop stars such as Ed Sheeran, Justin Bieber, Maroon 5 and The Weeknd, but the majority are Spanish-speaking singers in popular genres like reggaeton.

Despite being a small country, Uruguay has a distinct appetite for international indie music. In Montevideo, La Trastienda Club, which is an extension of La Trastienda Buenos Aires, hosts regular concerts by indie international bands such as Mac-de-Marco and Nicolas Jaar. International collectives such as Boiler Room and Sofar Sounds have taken place in Punta del Este, Montevideo and Maldonado. Although the majority of the indie bands that have performed at Sofar Sound sing in Spanish, bands such as Lucy Rose or Lowsounds have performed there too.

Días Nórdicos Festival debuted in 2016 with a line up of nordic indie artists with a strong western influence.

Compared to other South and Central American countries, Uruguay is a very desirable option to explore for Canadian independent artists.

Cluster de Música is a public-private coordination effort to strengthen the Music industry in Uruguay<sup>116</sup>. As of 2013, the associations that were part of Cluster de Musica were the Department of Creative Industries (DICREA) of the National Culture Department- MEC, Association of Authors of Uruguay (AGADU), Uruguayan Society of Interpreters (SUDEI), Uruguayan Association of Musicians (AUDEM), Uruguayan Chamber of Disco (CUD), Association of Sound Technicians of Uruguay (ASU) and

Association of Managers and Promoters Music<sup>117</sup>. They organize the international Uruguay presence at festivals such as WOMEX, Micsur, Bafim, SXSW and FERIA Pulsar among others.

La Feria de la Música de Uruguay debuted in 2016. This free event included talks and musical showcases by indie Uruguayan, rock and pop acts<sup>118</sup>. The talks were mainly focused on Uruguayan music services.

Montevideo Sound City had its first edition in 2016, too. Even though they had two special guest speakers from Chile and Brazil, it consisted of panel discussions with Uruguayan cultural managers, writers and entrepreneurs. More than 1600 people attended<sup>119</sup>.

Now in its fourth edition, Llegando a Montevideo Festival is also of note. Its first edition was supported by the Association for the Development of the Music Industry in Ibero-America<sup>120</sup> (Adimi), and took place whilst Montevideo was the Cultural Capital of Iberoamerica<sup>121</sup>.

The international music consultancy group GINGIO is planning a music industry event of their own in Montevideo<sup>122</sup>.

The country's independent record labels have tended to focus on domestic artists<sup>123</sup>. Despite this, the following record labels should be kept an eye on: Bizarro Records releases records from a wide range of genres. It owns a large portion of Orfeo Records' catalogue, which was one of the most important record labels in Uruguay. Esquizodelia Records is an independent record label collective formed by Vía Láctea Ediciones, Módulo Records, Feel de Agua, Nikikinki Records, Tarántula and El Octavo, amongst others. It is one of the main collectives in the Uruguayan independent music scene. It covers a large selection of music genres from low-fi, folk, pop and indie rock. Once a year they organize a festival called Peach and Convention, which is a free festival where local bands perform.

Salviatek is a new record label that connects Montevideo with the world club scene. It was founded by the producer Lechuga Zafiro.

**“International collectives like Boiler Room and Sofar Sounds have taken place in Punta del Este, Montevideo and Maldonado.”**



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# OVERVIEW

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## CONTACTS

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[feeldeagua@gmail.com](mailto:feeldeagua@gmail.com)

Peach and Convention:

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Nikikinki Records: <https://www.facebook.com/nikikinkirecords>, [nikikinkirecords@hotmail.com](mailto:nikikinkirecords@hotmail.com)

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# VENEZUELA

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**“In 2015, Major Lazer cancelled a show in Venezuela because of the country’s diplomatic relationship with the USA and the touring party’s difficulty in getting a visa.”**

Venezuela has a population of 31,108,083<sup>125</sup> inhabitants and a GDP of 371.3 billion USD. Its capital city, Caracas, is the most dangerous city in the world<sup>126</sup>. It has a murder rate of 119.87 per 100,000 inhabitants. Venezuela has 8 entries in the top 50 list of the most dangerous cities list<sup>127</sup>.

The Venezuelan economy depends heavily on oil revenues. Its currency, the Bolivar, is in freefall and there

has been a chronic shortage of food supplies for over a <sup>128</sup>.

## MUSIC ECOSYSTEM

According to the 2016 IFPI’s Global Music Report, Venezuela ranks 47th in physical global revenues and 52nd in digital global revenues. Venezuela is at the bottom of the Global Music Report list listing performance rights and synchronisation revenue. If the “revenue per capita is the key indicator of the music market development of a country” Venezuela is the least music-developed country in Latin America. If we consider its total music market of 2.5 million USD and its 29.3 million inhabitants (source: The World FactBook) it has a

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total music revenue per capita of \$0.1<sup>129</sup>.

However, the Venezuelan recorded music market increased 73.9% from 2014-2015. Recorded music revenues by sector in Venezuela during 2015 were as follows: 55% physical, 18% digital and 27% performance rights. In general, there are no established practices of buying music on the internet<sup>130</sup>, so music is downloaded illegally. Piracy is an epidemic in the country. Sacven, the Venezuelan collecting Society, alongside record labels, publishers and some government entities, has joined forces to combat widespread copyright issues<sup>131</sup>.

Apple Music, Ichamo (which is a Venezuelan online music shop), Deezer, Movistar, Google Play, Napster and itunes are available in the country<sup>132</sup>, whilst Spotify<sup>133</sup> is not. Some distribution platforms, like the Orchard, operate within the territory. Arepa Music is a global platform that helps Venezuelan artists' international promotion. The company has partnerships and alliances with the largest and most renowned internet promotion companies<sup>134</sup>.

Although the music scene is dominated by Spanish-speaking artists, western pop stars such as Justin Bieber, The Weeknd, Sia, Bruno Mars and Rihanna all feature in the top 100 list of the most Shazamed songs in the first week of 2017<sup>135</sup>.

There are bands that want to leave Venezuela because "there is little music industry, few opportunities and a lot of insecurity"<sup>136</sup>. The Venezuelan band La Vida Boheme (Latin Grammy winners) have previously stated that, had they stayed in Venezuela, they would not have been able to continue as a band<sup>137</sup>. In 2015, Major Lazer cancelled a show in Venezuela because of the country's diplomatic relationship with the USA and the touring party's difficulty in getting a visa<sup>138</sup>.

Although many festivals have disappeared<sup>139</sup>, there are still a few large music events, such as Expo DJs Venezuela, which is the largest Venezuelan electronic festival, and Festival Nuevas Bandas, which explores urban genres such as hip hop, rock, pop and electronic from emerging Venezuelan bands. Lánzate, a Venezuelan company dedicated to advertising and audiovisual production, has acquired the license to promote Billboard Venezuela. Billboard Venezuela<sup>140</sup> will have a print and digital magazine, TV and radio show, as well as a Hot 100 chart from February 2017<sup>141</sup>.

Venezuela showcases international talent once a year at the International Music Festival of Venezuela FIMVEN<sup>142</sup>, which has had two editions to date. It's promoted by the

Ministry of Culture in order to develop the Venezuelan music industry and its artists<sup>143</sup>. FIMVEN is an event that comprises musical showcases with industry talks and workshops. The festival lasts 6 days and has an extensive number of industry talks, and although the majority of the speakers are from Venezuela, you can also find international speakers from Chile, Japan and Colombia. International agents also attend<sup>144</sup>. More than 150 Venezuelan bands<sup>145</sup> performed during the last edition, where Cuba was invited to be the guest country. Amongst the more Venezuelan traditional music such salsa, rock, fusion and jazz, some Venezuelan pop and urban bands also performed.

FIMVEN also offers Venezuelan films projections, a children's space, artistic exhibitions and local food. 30,000 people attended the festival in 2015<sup>146</sup>.

There are a few independent record labels such as Cocobass, Pilla Records and Menos La Fábrica. An annual record label event takes place every year. It is organized by Centro Popular del Disco, which is a public entity that helps artists. There is a large online independent music radio for Latin American bands called NoEsFM.

**"In general, there are no established practices of buying music on the internet, so music is downloaded illegally."**

## CONTACTS

The Orchard Venezuela:

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FIMVEN:

<http://fimven.com.ve>

Arepa Music:

<http://arepamusic.com>. Otto Ballaben, CEO Arepa Music, [info@arepamusic.com](mailto:info@arepamusic.com)

Cocobass:

<https://cocobass.bandcamp.com>

Pilla Records:

<https://www.facebook.com/DiscograficaPilla>

Menos La Fábrica:

<https://menoslafabrica.bandcamp.com>

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NoesFM:

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Expo DJs Venezuela:

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Festival Nuevas Bandas:

<http://nuevasbandas.tumblr.com>

[nuevasbandasredes@gmail.com](mailto:nuevasbandasredes@gmail.com)

Sacven website:

<http://www.sacven.org>

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