MUSIC CITY STRATEGIES

Phase Three Report

ALBERTA, CANADA

West Anthem

ALBERTA music

National Music Centre
Centre National de Musique

Alberta Government

Prepared by

BIRD CREATIVES

West Anthem is an advocacy organization that was established to help stimulate the growth and sustainability of Alberta's music industry. Its objectives are to develop a comprehensive understanding of the economic profile of Alberta's music cluster, to build the business capacity of the music industry, to utilize Alberta's music industry as a key economic driver and a vehicle for diversification, and to establish and implement a live music strategy for Alberta through venue mapping and audience profiling.

LAND ACKNOWLEDGEMENT

Alberta spans five treaty territories and eight Métis settlements. Like their ancestors, many Indigenous individuals and families make their homes across the prairies, including the Blackfoot Confederacy – Kainai, Piikani, and Siksika – the Cree, Dene, Saulteaux, Nakota Sioux, Stoney Nakoda, and the Tsuu T'ina Nation. The Métis People of Alberta include the Six Regions of the Métis Nation of Alberta. Many First Nations, Métis, and Inuit, both from here and as visitors from elsewhere, have helped care for these lands for generations. We recognize they have traditions and relationships to the land far outstretching the arrival of settlers.

We are extremely grateful for these lands on which we reside, work, and play. We make this acknowledgement as an act of gratitude and reconciliation. While championing music across Alberta, we intend for our work to contribute to the valuing of traditional musical forms and result in greater opportunity for the creative Indigenous talent who walk these lands today.

This report is part of the groundwork, upon which West Anthem, the National Music Centre, the Government of Alberta and Alberta Music are building music city strategies.

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BACKGROUND & CONTEXT

Many aspects of Canada's music ecosystem were hit incredibly hard by lockdowns and health restrictions. Despite this, our nation's music market grew by 12.6% to a total of US$583.6 million in 2021.[1] Similarly, within Alberta, certain members of the music industry—e.g., small-scale live music venues, independent touring artists, etc.—faced intense hardship, yet the 2022 summer saw well-attended and even sold-out music festivals. Within this context, Alberta's music industry has the opportunity not only for recovery, but for resilient growth and renewed visioning of what is possible.

To take advantage of the opportunity present in the music industry, West Anthem, the National Music Centre, the Government of Alberta and Alberta Music are partnering to create music city strategies for Edmonton and Calgary and a toolkit for smaller municipalities. With such strategies in hand, Alberta can realize the growth potential of music. This also means investing in an industry that has countless positive knock-on effects for the wellbeing of Albertans and the liveability of our cities and towns.

As shown in the timeline below, the strategies will build on years of advocacy and work, most notably the West Anthem Music Ecosystem Study, published in October 2020.

Music cities are "communities of various sizes that have a vibrant music economy which they actively promote."

1 International Federation of the Phonographic Industry. (2022). Global music report 2022. https://musiccanada.com/news/ifpi-releases-global-music-report-2022-capturing-the-innovation-driven-music-market-trends-in-canada-and-around-the-globe/

2012

Scotlyn Foundation and the National Music Centre found Alberta Music Cities Initiative (now known as West Anthem).

2014

"Fertile Ground: The Alberta Music Cities Initiative" Published by the National Music Centre and authored by Music Canada

2019

Over 3,040 respondents participated in West Anthem's two online surveys between November 2019 and January 2020.

2020

West Anthem Music Ecosystem Study published in October.

2020-2022

There was a very distracting world event. Can't remember specifically, but it was "unprecedented".

2022

West Anthem partners with Alberta Music and the Government of Alberta to develop music city strategies for Edmonton, Calgary, and a toolkit for smaller municipalities.

2023

June - Phase 1 report on Music Ecosystem Updates released.
October - Phase 2 report released.
December - Phase 3 report released.

2023 -

Complete city strategies and toolkit, anticipated release early 2024

Over the next year, activities of the Music City Strategies include:

- Creating tailored music city strategies for Calgary and Edmonton
- Collaborating across municipalities and jurisdictions to determine common measures that allow us to track progress and successes for music cities
- Identifying and testing quick wins through intentional, small experiments to test and build on what works in the music industry
- Sharing a toolkit for small cities and rural Alberta music scenes to draw upon
- Supporting implementation, where possible, and monitoring outcomes

INTRODUCTION

To ground our research and ensure the meaningfulness and relevancy of the work, we engaged with folks in the music industry in several ways across phase three. Working toward three main deliverables (a music city strategy for Calgary, a music city strategy for Edmonton and a toolkit supporting music in rural and small city Alberta), a mixture of engagement methods were used, at times targeting different communities, but always seeking input from an array of music industry members. This phase report is a summary of the methods used, people reached, and insights gained.

ENGAGEMENT ONE: IN-DEPTH INSIGHTS

These engagement activities supported the formation of the Edmonton and Calgary music city strategies.

OBJECTIVES:

1. Identify narratives/unique characteristics for Edmonton's and Calgary's music city plans; a story or metaphor that differentiates their plans from others.
2. Select which music "areas" should be prioritized in the municipal strategies for Edmonton and Calgary ("areas" were identified in secondary research—see page 5 in Appendix A for the list and descriptions).
3. Based on the update of "Opportunity Areas" included on pages 5–12 of the Phase One Report, solicit input to determine if opportunity areas with "little to no movement" can be set aside at this time.

METHODS:

One-on-one interviews (60min) and small group discussions (90min) following a pre-set list of questions based on secondary research and objectives. Two members checks were performed after all small groups and interviews were reviewed to explore the credibility of the insights.

IMPLEMENTATION:

Purposive sampling was used to ensure representation from a wide variety of roles in the music industry (see a list of participants in Appendix B) as well as targeted recruitment of members representing diverse identities. Of 170 people contacted, 68 were able to participate. Small groups were primarily used with 1:1 interviews offered when a small group could not be scheduled. Each group was asked the same set of questions (see Appendix A). One research assistant was present and took notes for each small group and interview. Notes from approximately 35 hrs of conversation were compiled and reviewed by the research team for themes. Insights were presented in a series of two members checks with 17 small group leaders validating the credibility of insights gained.

Small group leaders contributed to recruitment, lead questions in the small groups, and took part in the members checks. They were offered an honorarium of $150 to thank them for the time and work they contributed above and beyond other participants.

INSIGHTS GLEANED:

Objective One:

These sessions offered some insight into members' perception of their local music scenes, although no distinct narratives or analogies arose with any level of consensus. The characteristics identified offer guidance in terms of language to use in the individual strategies to ensure the plans resonate with local music community members.

Edmonton was generally described as a place where music folks find community, collaboration and support. Alongside this was a sense of a scrappy, grassroots, and Do-It-Yourself music scene in which artists in particular have to wear multiple hats (e.g., promoter, marketer, booker, manager, etc.) in order to survive. Edmonton is perceived as an affordable place to live and supportive of the arts, but challenging to make a living solely from a musical career.

EDMONTON:

A PLACE WHERE MUSIC FOLKS FIND COMMUNITY, COLLABORATION AND SUPPORT.

CALGARY:

A GROWING, YOUNG MUSIC INDUSTRY WITH LOTS OF OPPORTUNITY.

In describing Calgary, participants focused on how music is growing there, seeing it as a young industry with lots of opportunity. Fewer participants commented on community support than in Edmonton and they tended to view artist funding as less available. However, more described the opportunities available to perform locally, make a living through their music and audiences willing to purchase merchandise.

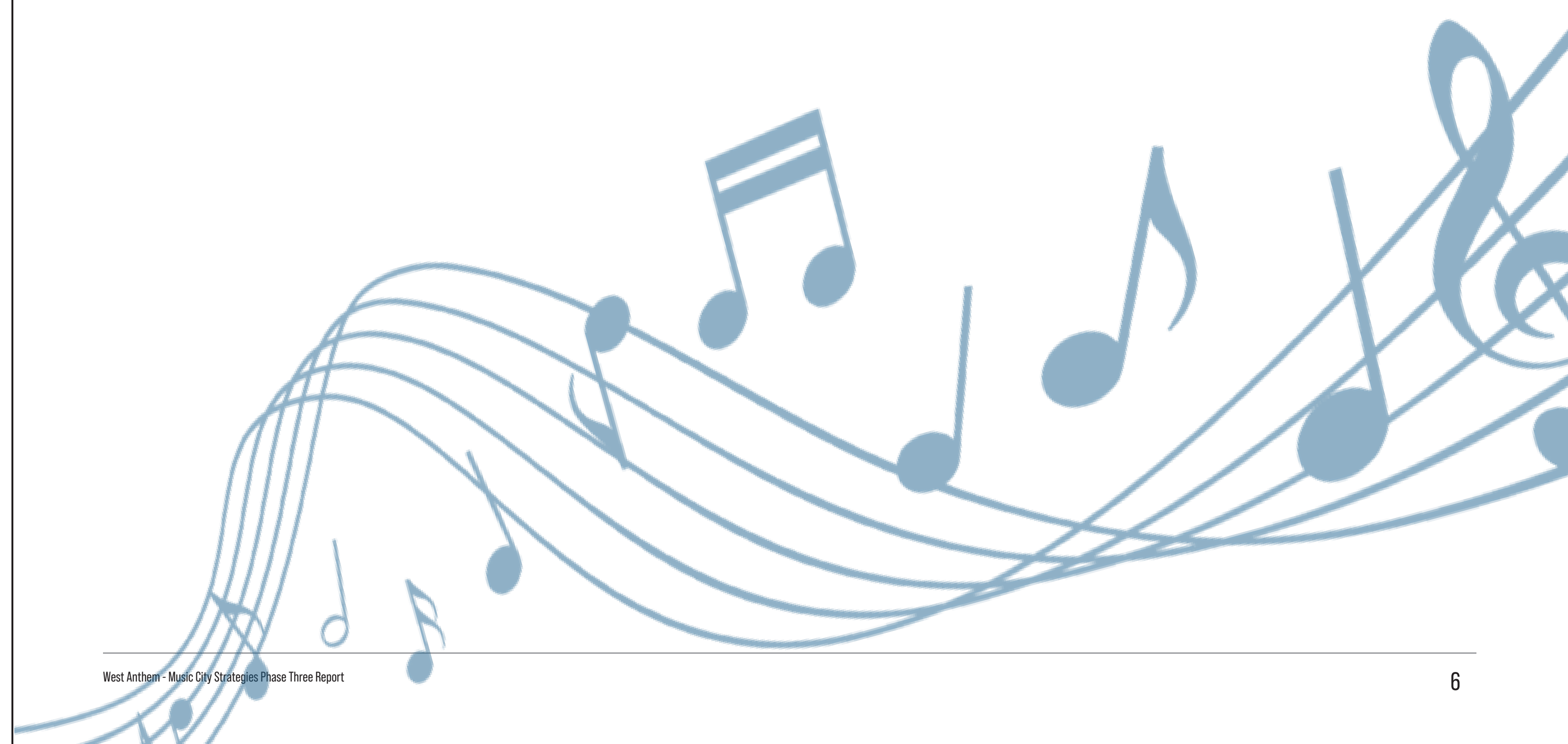
Participants from both cities described a lack of many key industry players who contribute to the music pipeline that allows creatives to move from artistic creation to consistent compensation (e.g., labels, artist managers, sound techs for venues and live shows, etc.). Representatives from both cities shared anecdotes of seeing talent go to other jurisdictions, with Toronto, ON and Vancouver, BC as the leading locations.

Objective Two:

The eight music areas reviewed were grounded in a review of existing city and provincial music and creative economy plans, strategies, and reports.

These eight areas were presented to small groups and interview participants with brief descriptions (see page 5, Appendix A). Across the various conversations, the general consensus was that all eight areas are important to a plan for music in Edmonton/Calgary, but that the areas also overlap or are closely related (i.e., often connecting "Spaces and Places" with "Infrastructure" or "Professional Development" with "People"). When asked if anything was missing the vast majority of participants said no or made suggestions that could generally be fitted within an existing area (e.g., "music landmark tours" could fit into "music tourism"). With no real differences arising between Edmonton and Calgary-based responses, these results suggest that the findings from other cities and provinces have applicability to the music industry in Albertan cities and the areas were sufficiently broad to capture the majority of current priorities.

Finally, when asked to select three of the areas, in no particular order, that they see as important drivers for Edmonton and/or Calgary's music industries, responses from both cities followed a similar pattern again: Infrastructure (including Spaces & Places), Regulatory & Government Support (especially funding, permits, and bylaws) and Professional Development (with a focus on filling industry gaps and developing healthy music networks). In the members checks it was suggested that "People" would be a more meaningful category title as professional development opportunities serve the people within the music industry, therefore, this change was adopted with agreement of the members checks. Narrowing eight areas down to three was considered an important step to making the city strategies more manageable and cohesive while helping focus strategy actions and calls for funding to the identified priorities of artists and music businesses.



Objective Three:

In an effort to build on the ongoing work of West Anthem, participants were presented with ten opportunity areas that had been identified in the 2020 West Anthem Music Ecosystem Study. Of 31 opportunity areas total, these ten were found to have had little to no movement as of late 2022 (see pages 5–12 of the Phase One Report to review). To determine if opportunities had changed or needed rewriting, participants were given a poll to fill out where, for these 10 opportunity areas, they indicated:

1 - No longer relevant or not in scope
2 - Possibly relevant, but not a priority right now
3 - Neutral (or I do not know the jurisdiction well enough)
4 - Seems pretty important to me
5 - The music industry needs this

A summary table of response frequencies is provided in Appendix D.

Two opportunity areas with low priority among current artists and music industry members:

#4. Edmonton Opportunity: Develop Edmonton Busking Guidelines

A few exceptions pointed out the need to update the guidelines to make them friendlier for performers, but in general this seemed a lower level of priority at this time.

#21. Provincial Opportunity: Offset the Costs of Booking International Artists by Drawing in Musicians to Record in Alberta through a Reimbursement Program

Conversation reflected that people disagreed with opportunity 21's focus on international artists, preferring to build locally and make recording in Alberta more attainable for local artists. It was also pointed out that established artists on a circuit would likely have only short windows of time in the province, unlikely sufficient for recording. General agreement that funding to cover booking costs is desirable.

Two opportunities that elicited the strongest responses in favour of making them happen were:

#9. Provincial Opportunity: Work with Indigenous Communities to Integrate Indigenous Music Education Programs into Provincial Curriculums

Respondents had few ideas in terms of how to accomplish this, especially recognizing that curriculum is a provincial level action. When addressing why there hasn't been much movement on this opportunity some spoke to the challenges of collaborating without imposing non-Indigenous values and systems, emphasizing the need for time and relationships with Indigenous leaders and communities to do this well. Many pointed out this needs to be a provincial government priority for real movement to take place. A few mentioned the challenges are exacerbated owing to the fact that arts programming is frequently reduced or cut when the government is in deficit mode. A few participants mentioned a current lack of teaching resources that help educators approach this in a sensitive and healthy manner and that folks may be hesitant out of fear of "getting it wrong". Overall the sense was that although challenging, this is an opportunity that should be pursued for the long term benefits not only to Indigenous communities, but to settlers and wider Canadian society.

#17. Provincial Opportunity: Facilitate Long-Term Creation of Music Spaces (Education, Rehearsal, Recording and Performing) through Incentives to Developers of New Projects and Re-developers of Existing Buildings

When asked why there wasn't movement in this area, respondents had a number of replies. A few pointed to the need for leadership—not only to get spaces created, but to run and manage those spaces. Others pointed out the struggle to run existing spaces and that support there would be meaningful, especially to help make those spaces affordable (e.g., for rehearsing, recording, performing, collaborating). They point to poor connections between spaces and users so that some spaces are underutilized while others, such as rehearsal spaces at the public libraries, are constantly booked up. In general, respondents felt that developers are unlikely to create music spaces without direct incentives. A few comments addressed the idea of reusing or repurposing older buildings that can lend a character and ambience not found in new builds. While almost everyone agreed that developing music spaces is a priority, they focused more on the need for expanded use of, access to, and support for existing spaces. This emphasis will be reflected in the municipal strategic plans.

Overall, the opportunity areas prompted a number of ideas among participants. Where still prompting interest, city specific opportunities will be incorporated into the forthcoming strategies and the provincial level priorities will be discussed.

ENGAGEMENT TWO: ONLINE SURVEY

This engagement activity contributed information for the development of Edmonton and Calgary music city strategies and the provincial toolkit for rural jurisdictions.

OBJECTIVES:

1. Increase awareness of West Anthem's ongoing work and forthcoming strategies and toolkit among members of Alberta's music industry.
2. Garner feedback on strengths and limitations of the music scenes in various jurisdictions from a broader swath of Alberta's music industry (e.g.,artists, festival producers, sound engineers, artist managers, venue operators, etc.).
3. Where possible, compare and contrast survey responses by demographics to better reveal the experience of members of various equity-denied/marginalized groups (lack of data from equity-denied/marginalized groups was raised and discussed in multiple small groups).

Note to readers: The terms to refer to people experiencing elevated levels of barriers (or reduced access to privileges) are many! There is no single, perfect term. We have opted to use "equity-denied" and "marginalized" interchangeably.

We firmly believe that exploring the experiences of individuals and groups historically or currently denied equitable access to opportunities (i.e., equity-denied) is a step to bringing equity to all. Additionally, using the term "marginalized" reflects the experience of some people of being actively pushed out of spaces and conversations owing to their perceived differences. Neither term describes the entirety of any person or their experiences—nor does it deny that everyone can face moments of inequity and marginalization in their lives.

METHODS:

The online survey was administered using Google Forms and included a mixture of 17 open-ended and closed-ended qualitative questions (see survey questions in Appendix C). An issue arising in the initial small groups and interviews was around the need to better capture and understand diverse perspectives and experiences in music in Alberta. Based on this, a series of demographic questions were asked at the beginning of the survey. It was intended that answers would be compared or contrasted based on the demographic groups to reveal additional insights in the analysis. Other questions asked about strengths and limitations of local music scenes.

IMPLEMENTATION:

Using insights gathered through secondary research and the small groups and interviews, survey questions were composed and administered by Bird Creatives. The survey was available online from July 5 to September 15, 2023. The survey was sent directly to music-related contacts (existing contacts as well as newly identified musicians and music businesses through online searches) and promoted through paid campaigns on social media (contacts were given blurbs and visual assets so they could also share with their networks). Six prizes were advertised to incentivize participation (participants were given the option to submit an email at the end to be included in a randomized draw). Two membership prizes to NMC were held in reserve in case winners could not attend prize events. Eight prizes total were awarded.

Participants had to have held a music related role in Alberta (current employment not required in recognition that many are gig workers and/or use work elsewhere to support their music activities). Out of 458 responses submitted, 445 were analyzed after data cleaning (removed duplicate responses).

SHOUT OUT TO AMAZING PALS IN THE MUSIC INDUSTRY WHO HELPED INCENTIVIZE PARTICIPANTS BY PROVIDING AWESOME PRIZES:

Edmonton Downtown Business Association | BOP MGMT & Consulting | CKUA | Alberta Music | Stampede Entertainment | Francis Winspear Centre for Music | National Music Centre

INSIGHTS GLEANED:

Objective One

The survey resulted in additional input from 445 current or previous Alberta artists and music business members. Combined with the in-depth conversations, this information lends strength to engagement findings. Additionally, where the small groups may have gathered in-depth information from 2-3 folks representing a particular role (i.e, two sound engineers), the survey resulted in more such perspectives being captured (i.e., 92 survey participants identified as sound engineers, among other roles), ensuring stronger representation from a broad array of music related roles and organizations.

Demographics of Survey Respondents

A note to readers: Demographic categories can be complicated. In our survey, we attempted to include a diverse collection of terms so that participants could identify with something rather than outside something. We have attempted to maintain this in presenting the demographic information, although some groups have been combined to enhance anonymity. Additionally, for questions 2, 4 and 6, the total responses are more than 445 because respondents were allowed to select more than one answer. It's far from perfect, but we want our language to reflect the value we have for diverse identities.

Q1: What is your city of residence?

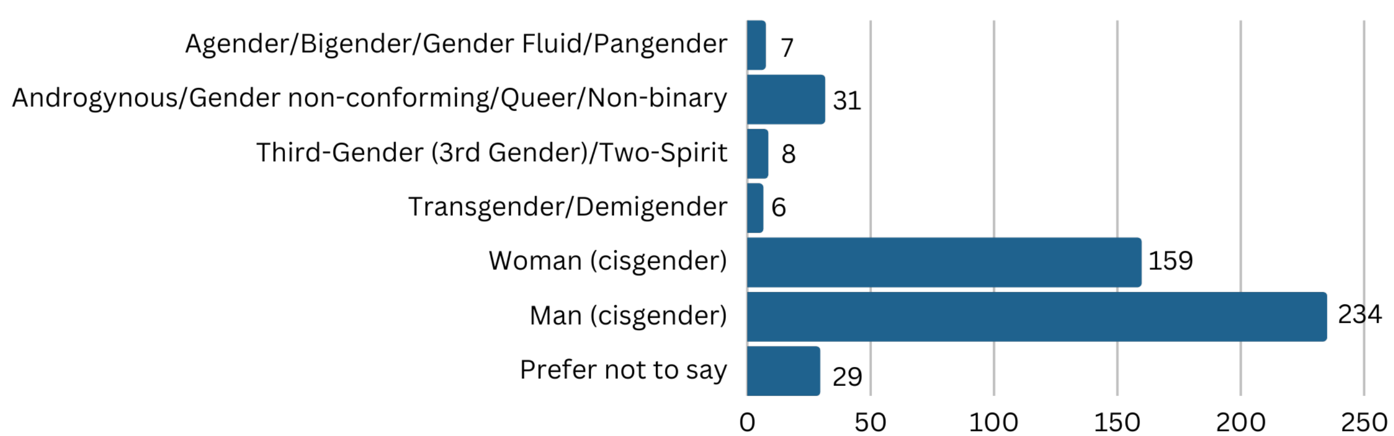
CALGARY

EDMONTON

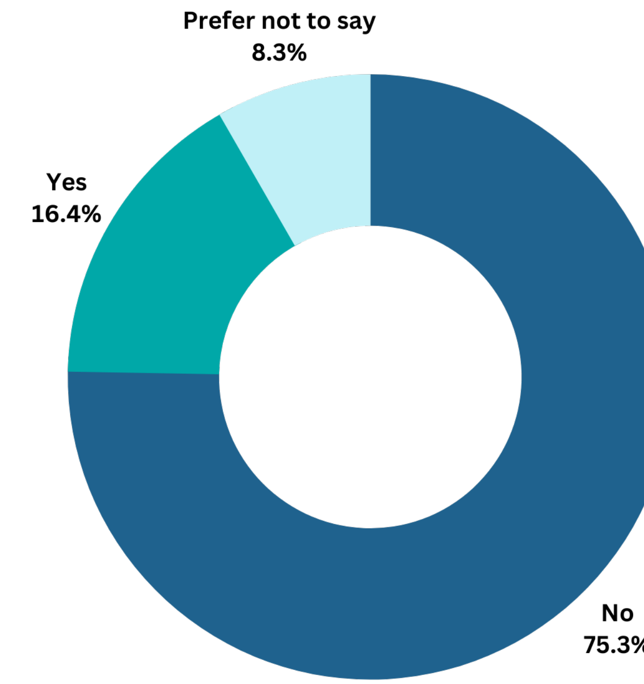
Elsewhere in Alberta (e.g., High Level, Red Deer, Barrhead, Fort Saskatchewan, Benalto, Airdrie, Medicine Hat, etc.)

Prefer not to say: 4

Q2: What term(s) would you use to describe your gender identity?



Q3: Do you self-identify as a member of the 2SLGBTQQIA+ (Two-Spirit, Lesbian, Gay, Bisexual, Transgender, Queer, Questioning, Intersex, Asexual, Plus) community?

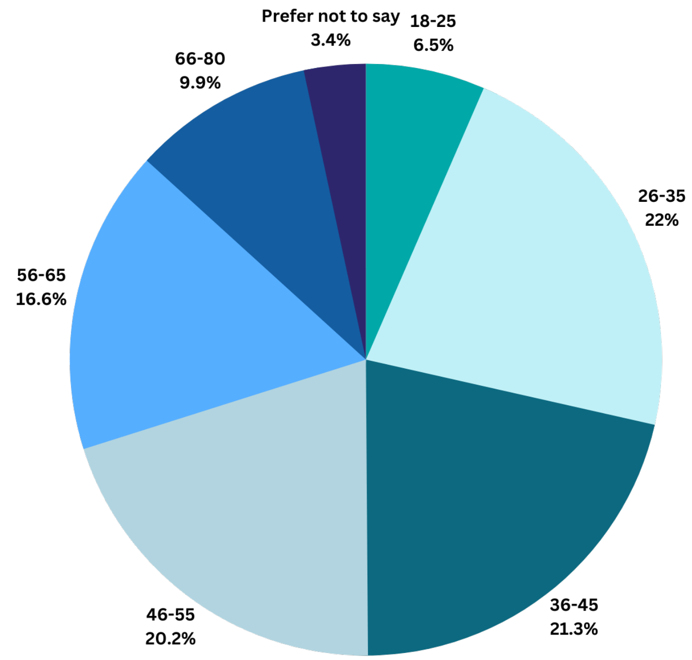


Q4: What language(s) do you create, showcase, and/or perform music in?

English	432
French	53
Spanish	25
An Indigenous language such as Cree, Algonquin, or Inuvialuktun	19
Tagalog	10
German	6
Italian	5
Japanese	3
Latin	3
Mandarin	3
Russian	3
Ukrainian	3
Portuguese	2
Punjabi	2
Additional languages indicated only once each[1]	18
Prefer not to say	4

1 Tigrinia, Greek, Croatian, Amharic, Swahili, Dutch, Hebrew, Farsi, Arabic, Setswana, Hungarian, Norwegian, Slovenian, Estonian, Finnish, Swedish, Icelandic, Cantonese

Q5: Your current age bracket:



Q6: How do you racially identify?

Indo-Caribbean (e.g. Guyanese with origins in India)	3
“Other” (e.g. self-identified as BIPOC, Austronesian (Pacific Islander), etc.)	4
East Asian (e.g. China, Japan, Korea, Taiwan)	5
South Asian (e.g. India, Sri Lanka, Pakistan)	5
Black African (e.g. Ghana, Kenya, Somalia)	7
Middle Eastern (e.g. Egypt, Iran, Israel, Saudi Arabia)	7
Latin American (e.g. Argentina, Mexico, Nicaragua)	8
Black Canadian or African American	13
South East Asian (e.g. Vietnam, Malaysia, Phillipines)	17
Indigenous to Turtle Island and Inuit Nunangat (First Nations, Métis or Inuit)	45
White European (e.g. England, Greece, Sweden, Russia)	65
White Canadian or White American	291
Prefer not to say	30

Q7: Are you currently employed in a role within the music industry (including self-employed)?

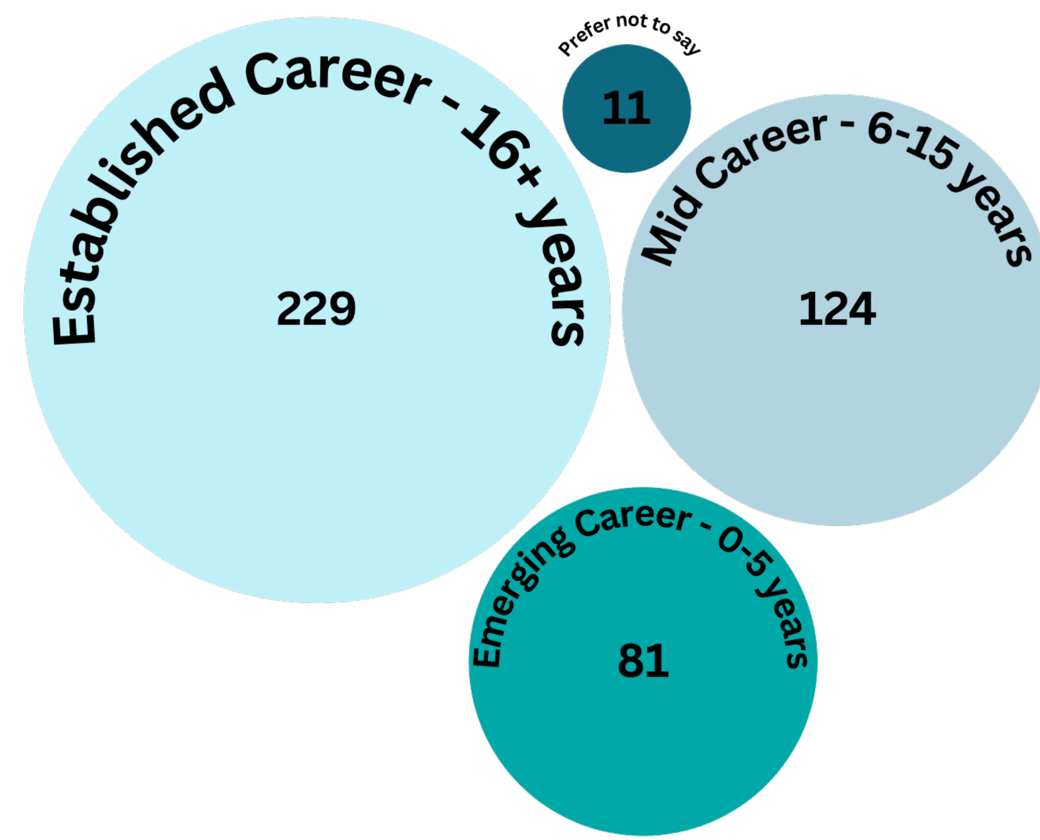
Yes	336
No	92
Prefer not to say	17

76% OF RESPONDENTS WERE CURRENTLY EMPLOYED IN THE MUSIC INDUSTRY

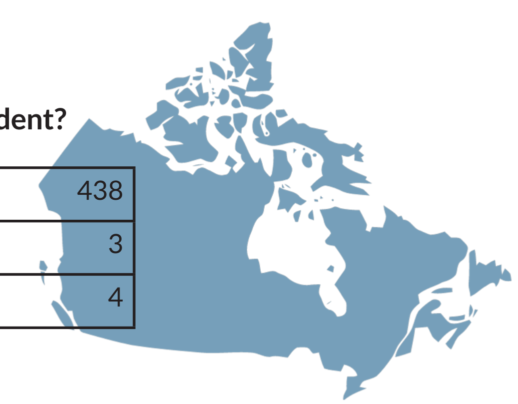
Q8: What roles have you had within the music industry?

Artist/Musician/Performer	341
Music Business Worker (including festival workers, composer/songwriter, venue owner/manager/admin, sound technician, rigging, sound engineer, record label owner, agent, music equipment rental company, producer, music publisher, music funders, artist manager, music education, music manufacturers, publicist, etc.)	100
Prefer not to say	4

Q9: How many years have you been in the music industry?



Q10: Are you currently a Canadian Citizen or Permanent Resident?



Yes	438
No	3
Prefer not to say	4

Objective Two

Below are graphs and summaries of the responses to questions 11–17.

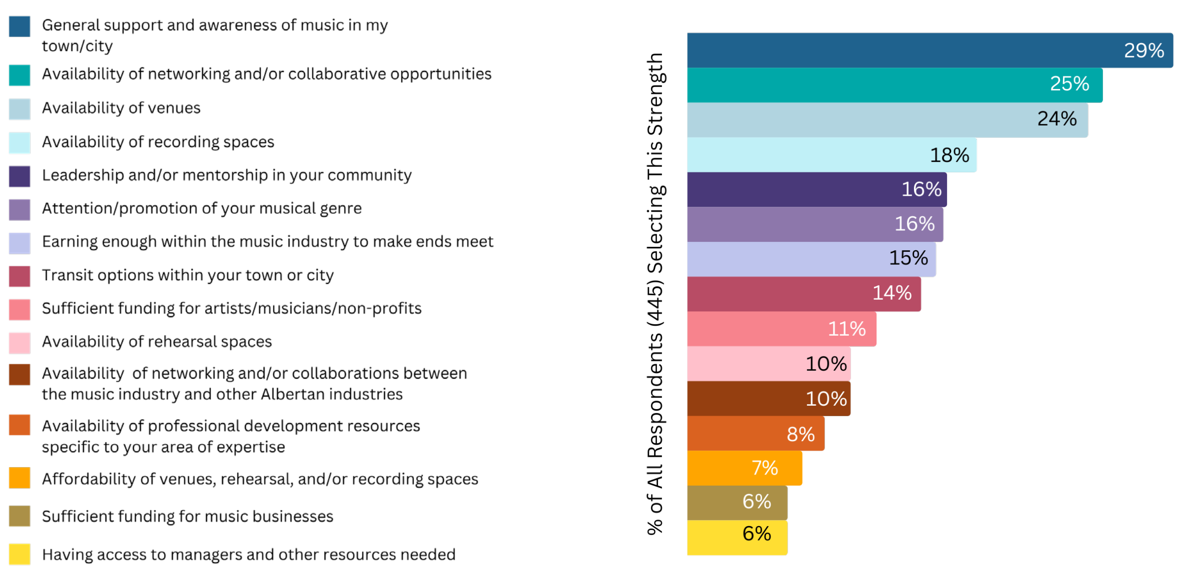
Q11: What are some of the greatest limitations for your thriving in the music industry currently?

Possible responses were presented in no particular order and respondents were permitted to choose up to 6

- Top three limitations selected when all responses taken together: "Having to "do it all" as an artist, including marketing, management, etc." (selected by 57%), Having to work outside the music industry to make ends meet (56%) and Lack of funding for artists/musicians/non-profits (52%)

Q12: What are some of the greatest strengths/supports for your thriving in the music industry currently?

Possible responses were presented in no particular order and respondents were permitted to choose up to 6



- Top three strengths selected when all responses taken together: "General support and awareness of music in my town/city" (29%), "Availability of networking and/or collaborative opportunities" (25%), and "Availability of venues" (24%)

Q13: Where do you seek information (i.e., facts, statistics, trends) about the music industry or your segment of the music industry?

Respondents were allowed to choose up to 6 from a list

- Top three information sources arising when all responses taken together: "Word of mouth (colleagues, co-workers, friends, etc.)" (72%), "Media (television, newspapers, online articles, podcasts, etc.)" (51%) and "Music Associations (e.g., Canadian Independent Music Association, Canadian Live Music Association, Alberta Music, Country Music Alberta, etc.)" (46%)
- 20% of respondents do not specifically seek information about the music industry or their segment of the music industry

Q14: What COVID-19 initiatives and strategies do you want to see adapted for longer-term application in the overall music industry?

The restrictions of the pandemic prompted new and sometimes innovative practices among artists, music businesses, and funders. As such, this open-ended question intended to capture practices that were viewed as holding longer-term value for the music industry (apart from a pandemic setting). Written answers were reviewed by two research team members and broken down into comments (i.e., "more financial support for artists and keep using outdoor spaces" would become two comments "more financial support for artists" and "keep using outdoor spaces"). Based on this process, 491 comments were identified, fitting under five major thematic areas (excluding "none", "unsure", or unclear comments).

Funding (180 comments)

» "More funding" was repeated in 80+ comments, highlighting that many music businesses and artists are still recovering from limited profits and reduced wages over the pandemic

» Participants expressed a need for funding to be available to all sectors of the music industry (i.e., artists, venues, music businesses and infrastructure, etc.)

» Comments about improving funding processes/requirements focused on
  - flexibility (this was key to adapt during the pandemic, but offers value beyond those circumstances)
  - resources necessary to apply and report should be appropriate to the level of funding received (e.g., microgrants should be simpler)
  - complex application processes should offer more support around applying
  - funding during slow periods (i.e., winter, shutdowns, etc.)
  - allow funds to be applied toward ongoing work rather than limited to new events/projects (e.g., allow venues to apply for funding for their regular music series rather than having to produce a separate series to receive funding; or professional development for artists and those in other industry roles such as promoter, manager, sound technician/engineer, venue operator, etc.)

» A group of comments focused on sustainable livelihoods, suggesting:
  - Basic living incomes for artists
  - Support to secure health benefits, insurance, etc.
  - Fair compensation for work
  - compensation for lost income due to unforeseen circumstances (like lockdowns)
  - Open conversations about issues such as streaming rights and copyright payments

Spaces & Places (153 comments)

- » Comments called for increased access to unique or innovative venue spaces (i.e., using public spaces for music events, adapting existing spaces to become music venues, multi-purpose spaces, or support non-music venues in hosting talent)
- » Interest in more small to mid-sized stages and spaces for upcoming artists and intimate concerts
- » Comments also stressed the importance of accessible performance spaces and needing to address how various spaces engage and support emerging artists and underrepresented groups such as BIPOC artists, 2SLGBTQQIA+ artists, or artists with disabilities
- » 120+ comments specifically mentioned continuing the creative use of outdoor spaces and hosting outdoor events throughout the year (especially in summer):
    - Use public park space, patio spaces, parking lots, etc.
    - A few suggested easing restrictions on outdoor alcohol consumption at these sites/events
    - Pop-up events in neighbourhoods across the city were seen as particularly powerful for engaging communities in meaningful arts/cultural experiences outside the downtown core

Digital (85 comments)

- » Supporting digital events, integrating them alongside live events (e.g., hybrid events), using them to increase accessibility for those who can't attend specific venues or afford tickets to the live event
- » Wanting greater use of digital tools and platforms for training, mentorship, networking, promotion, advertising, growing audiences, etc.
- » Needing support in terms of costs (e.g., for digital equipment and experts, training, website & SEO development)

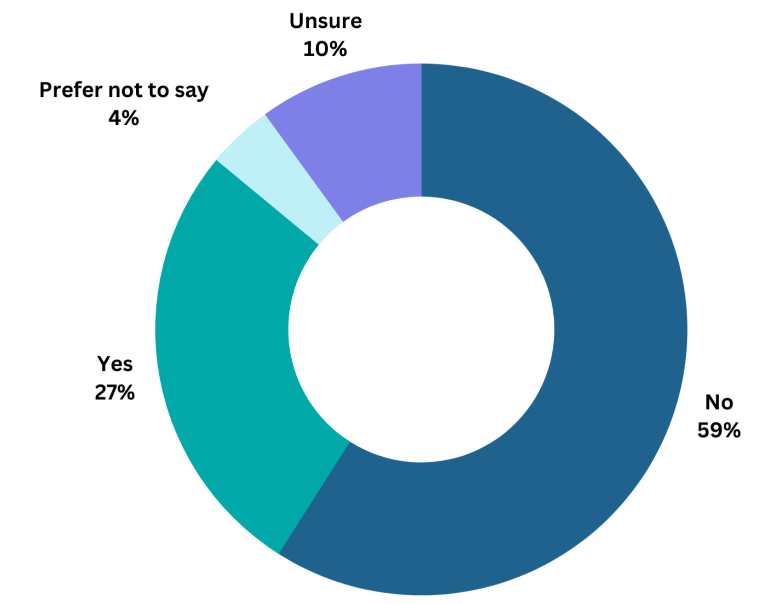
Industry Gaps (40 comments)

- » Comments emphasized the need for greater equity and inclusion within the music industry
    - more booking opportunities for underrepresented groups and artists of all ages
    - creating more physically accessible spaces
    - performance opportunities that welcome diverse genres
- » Several comments pointed to the role of local awards, formal recognition, and representation of local artists in festival and shows as important to building up local music scenes
- » See opportunity to improve infrastructure for promotion, including the possibility of regional marketing plans

Health & Safety (32 comments)

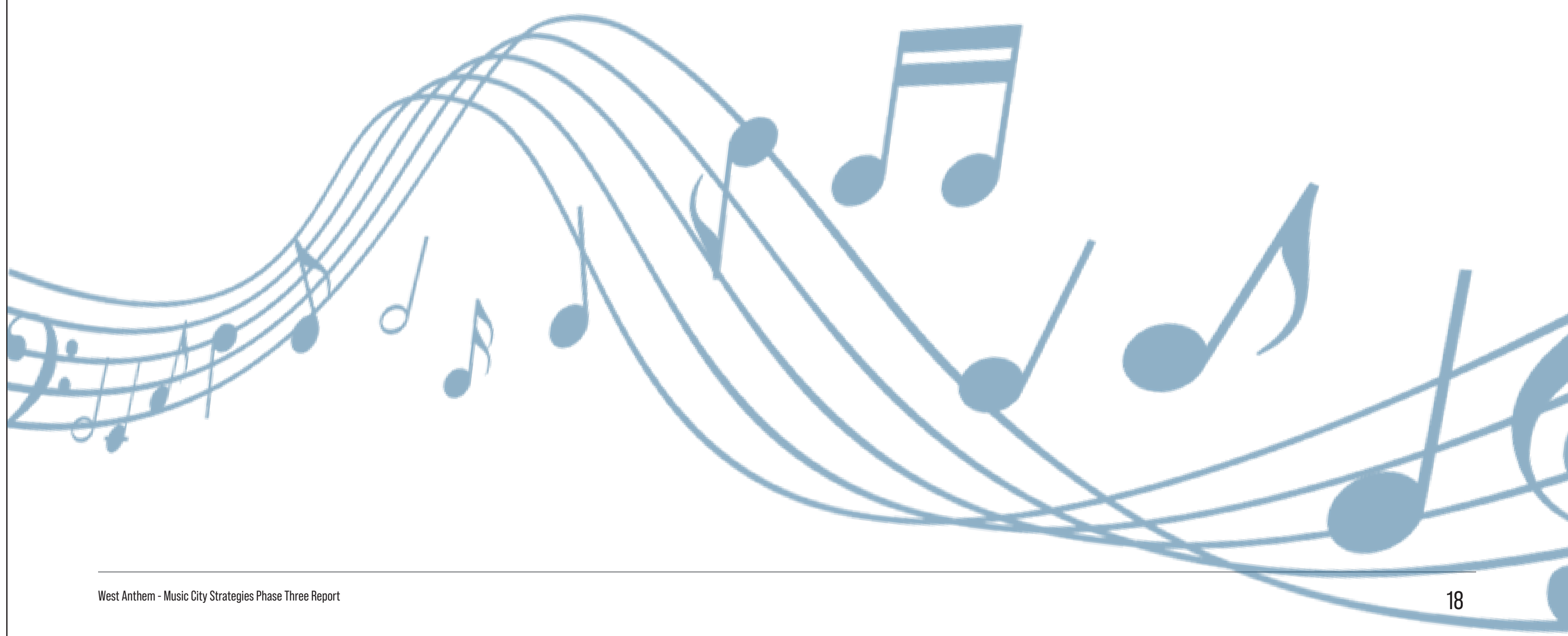
- » Comments regarding specific COVID-19 practices (i.e., mask-wearing, vaccine requirements, distanced seating) were mixed between those who supported them and those who found them onerous. Venues and music businesses having contingencies in place for health crises was generally considered an asset.
- » Longer-term considerations that people suggested:
    - A subgroup pointed out that practices could offer long-term value in terms of creating safe shows specifically accessible to immunocompromised audiences
    - Going forward, consistent and clear health and safety communication was seen as important to reducing conflict and confusion
    - Monetary support for venues to improve air quality and circulation (i.e., funds to enhance their HVAC systems or install effective air filtration equipment permanently)

Q15: In your career in the music industry, have you ever felt you were unable to thrive based on your sexual orientation, gender, spirituality, racial and/or ethnic identity, or ability?



Q16: If you answered "Yes" to Question 15 (above), would you say you have felt unable to thrive based on your sexual orientation, gender, spirituality, racial and/or ethnic identity, or ability within the last twelve months?

- Of those who had replied "Yes" to the previous question, **64% replied "yes" to feeling they have been unable to thrive in the last 12 months**
- It was important to clarify that these experiences were not all historical, results indicate an ongoing need to address EDIA issues within music



Q17: What do you feel is the greatest barrier to success for those in the music industry who are members of marginalized collectives, including but not limited to, Black, Indigenous, People of Colour, 2SLGBTQQIA+, folks living with disabilities and/or who are neurodivergent?

This open-ended question aimed to elicit specific information about the barriers to success for diverse individuals within the music industry. Written answers were reviewed by two research team members and broken down into comments as with question 14. Based on this process, 425 comments were identified, fitting under three major thematic areas (excluding "none", "unsure", or unclear comments).

Economic Barriers (99 comments)

» Comments recognized this can be a challenge for anyone within the music industry, but this can be especially detrimental for members of marginalized or equity-denied groups who may have fewer community resources to call on and/or experience lower socioeconomic status

» In particular, comments focused on the value of funding to support:
  - Career development through mentorship opportunities, networking, training and paving pathways into the industry
  - Individuals accessing mental health supports
  - Sustainable livelihoods (supports like grants and/or a universal basic income)
  - Providing resources and additional support for neurodivergent artists and music industry workers with disabilities
  - Music infrastructure including venues, music production, recording studios, and distribution—all expensive hurdles to artists
  - Promotion, particularly of genres outside country and folk and/or diverse artists within all genres

Social Barriers (249 comments)

» Lack of representation of genders, sexual orientation, race, and abilities in musical leadership and in non-performing roles of the industry
  - Contributes to the perception that they are not valued beyond token roles
  - Harder to find mentors who understand the breadth of challenges faced by emerging artists and music workers from these communities
  - Fewer "well-connected" contacts who can share valuable industry knowledge about resources and opportunities

» Bias and discrimination can impact marginalized/equity-denied groups in a multitude of ways:
  - Venues, bookers and promoters may overlook opportunities to appeal to new markets and not specifically seek/contract artists from traditionally marginalized groups out of fear of booking acts they assume their audiences will reject
  - Similar concerns to the above can result in inequitable access to sponsorship and endorsement opportunities
  - Gatekeepers who harbour bias or discriminatory beliefs have an outsized impact on the access of certain communities to the music scene, especially in the form of booking/performance opportunities
  - Even when booked, artists and workers may find themselves marginalized within particular events or expected to fill specific roles or support specific causes (i.e., tokenism)

  - Artists and workers can feel unsafe and even face violence from homophobia, transphobia, racism, sexism and ableism, etc., both from audiences as well as other music industry members
  - Bias in favour of the status quo can keep organizations and leaders from implementing changes that might enhance equity, diversity, inclusion and accessibility practices (e.g., general expectations around in-person communication can be a hurdle to neurodivergent artists who may face increased difficulties in social settings); these can become institutional barriers when solidified in policies and procedures

Physical Barriers (22 comments)

» A lack of physical spaces in which to perform (making the competition for existing performance opportunities more fierce)

» Venues and music spaces that fail to accommodate various levels of physical abilities automatically exclude those people from participating as artists, workers and audience members

Across the comments there was tension between promoting diversity and inclusion while ensuring that merit and talent remain central to music opportunities. For commenters on both sides of this tension, there is general agreement that they want the focus to be on the music and to see all music industry members thrive. Disagreement arises around the current feasibility. Some commenters call for "merit-based" decision making (i.e., for booking, funding, hiring, renting, etc.), while others criticize meritocracy for perpetuating disadvantages/advantages created by historical and current injustices. For example, artists with disabilities who require adaptive instruments or accessible rehearsal and performance spaces have more limited options on what and where they can play. No amount of merit erases the additional barriers they face. Equally (or even less) talented able-bodied artists are more likely to find bookings. In other cases, by catering to the tastes of the crowd, promoters and venues can take on the biases and discrimination of the audience. They may exclude groups perceived as riskier (i.e., less mainstream, not fitting the "image" of a particular genre). Artists and groups can be excluded before the level of talent/merit is even considered.

While implementing equity, diversity, inclusion and accessibility practices was largely promoted as a positive, doing so as a type of check-box exercise was described as potentially detrimental to intended outcomes. For example, while hosting an "Indigenous Stage" at a festival is generally seen as positive, it can be detrimental if talented, professional level artists are pushed there instead of the main stage. It is not the equity-denied groups to blame, but systems and organizations needing to add depth to their EDIA work and practices. This points to the active role individuals and music organizations need to play in promoting diversity and inclusion.

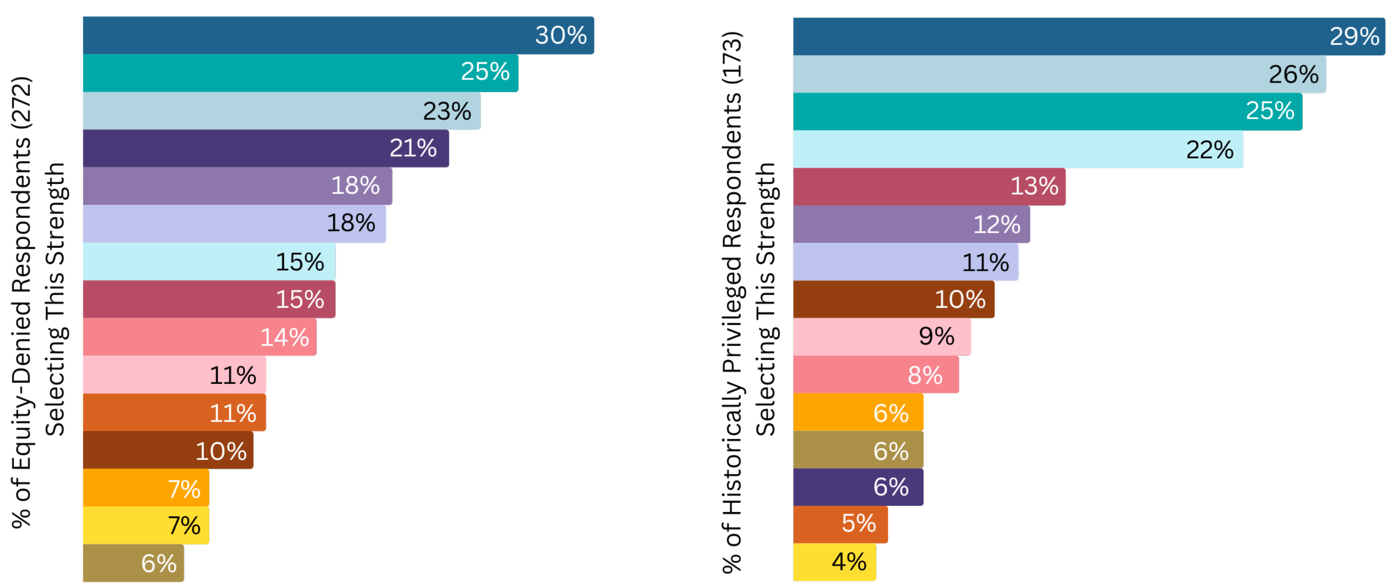
Objective Three

Tables showing all the responses and cross-tabulations by demographic groups can be found in Appendix E. Below are notes where group responses differed by a proportion of at least 10%.

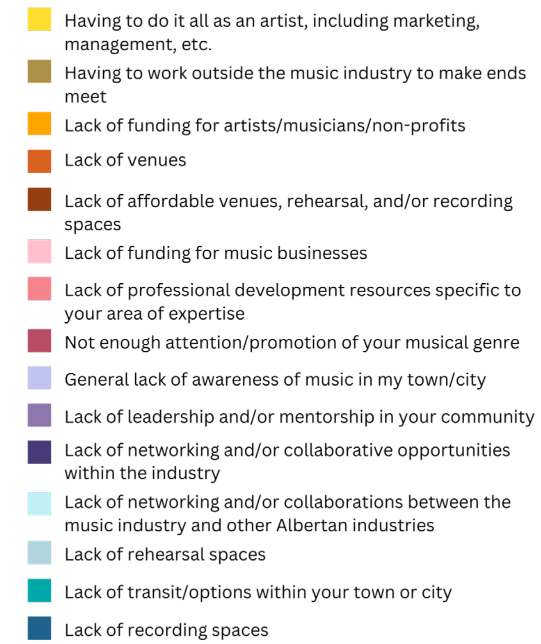
As mentioned previously, a number of demographic groups needed to be combined to create groups large enough for comparison and we were especially interested in capturing any major differences in responses between those identifying with equity-denied/marginalized communities compared to others. Based on this, researchers created a new code applied to respondents who indicated potential belonging to an equity-denied group. This code was applied to respondents who identified as:

- agender/bigender/gender fluid/pangender
- androgynous/gender non-conforming/ queer/non-binary
- third-Gender (3rd Gender)/two-spirit
- transgender/demigender
- woman (cisgender)
- a member of the 2SLGBTQQIA+ community
- creating, showcasing and/or performing music in a language other than English (entirely or in part)
- black, brown, person of colour, BIPOC
- First Nation, Métis, Inuit
- not currently a Canadian citizen or permanent resident

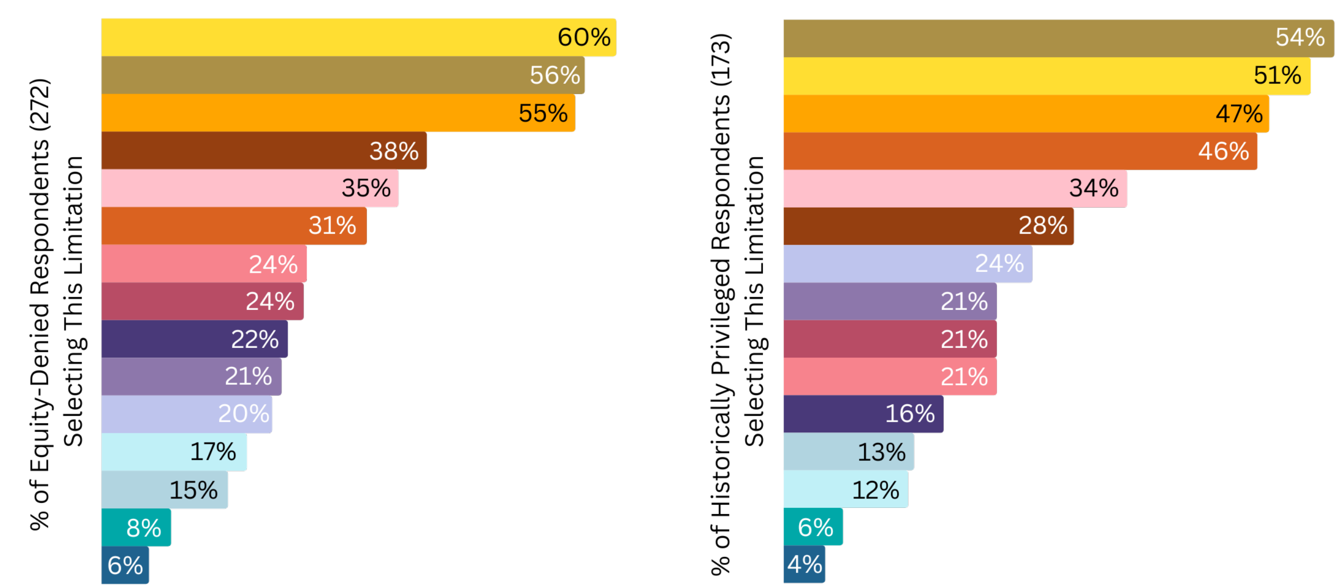
This was then compared with responses among participants who did not identify with any of the above criteria. See how these groups answered questions 11, 12, and 15 below



- In slightly different order, but at similar rates, marginalized participants and others selected the same top three strengths/supports that help them thrive in the music industry currently.
- A larger proportion of marginalized participants compared to others (21% versus 6%) named "Leadership and/or mentorship in your community" as a support for their thriving in the music industry currently, underpinning the importance of creating more mentorship opportunities, as identified in the answers to the open-ended questions.

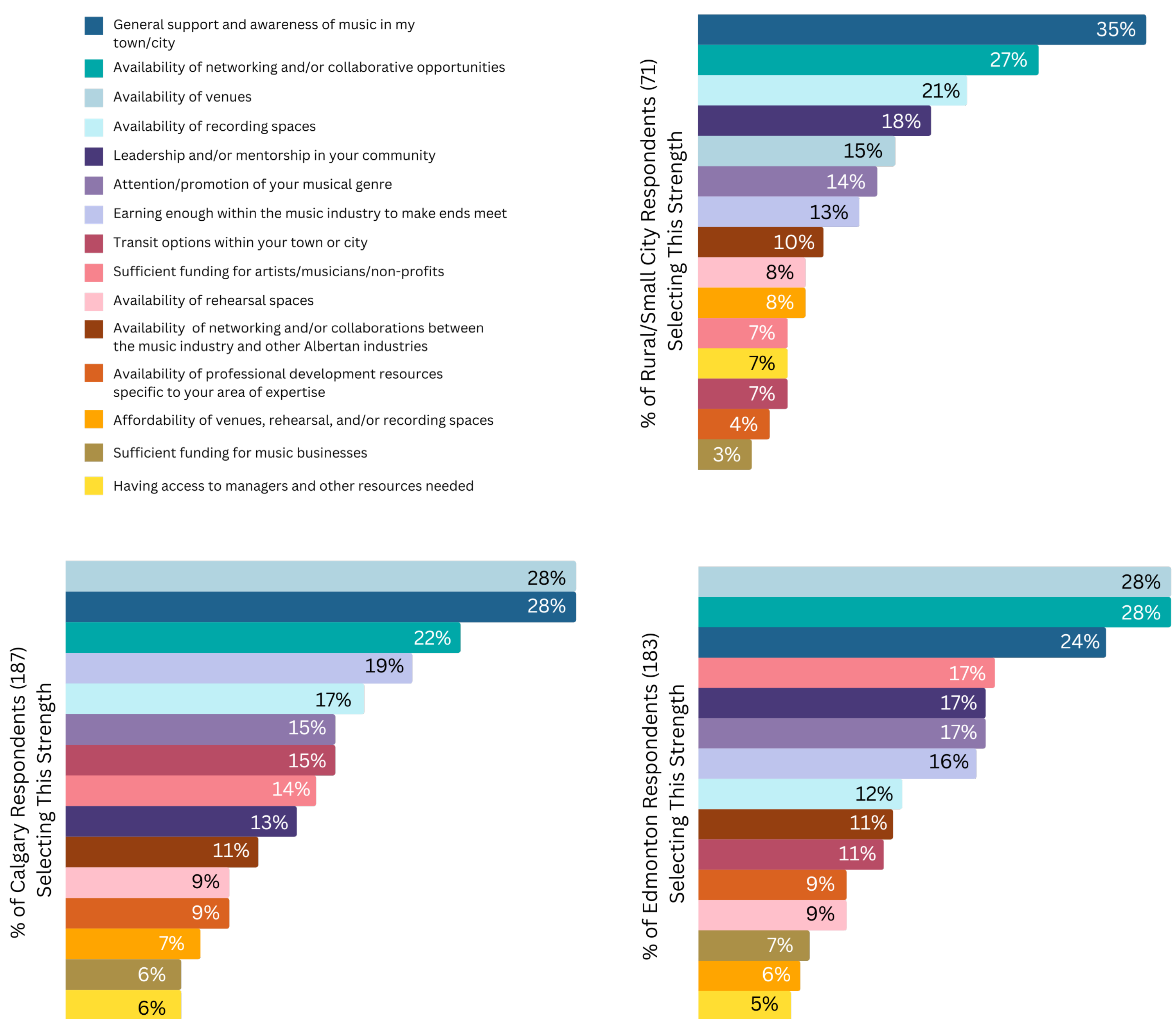


- The top six limitations to thriving currently noted between the two groups are the same, in slightly varied order. This suggests that addressing these limitations is likely to help a majority of members of the music industry. It will be important to determine, where possible, if unique mechanisms are required for helping different groups address similar barriers.
- A larger proportion of marginalized participants compared to others (38% versus 28%) selected "Lack of affordable venues, rehearsal, and/ or recording spaces" as a barrier to thriving in the music industry currently while a smaller proportion of marginalized participants compared to others (31% versus 46%) selected "Lack of venues" as a barrier. This may indicate that, while the availability of venues is an issue for many in the industry, the cost of renting is the bigger barrier to thriving for equity-denied groups.

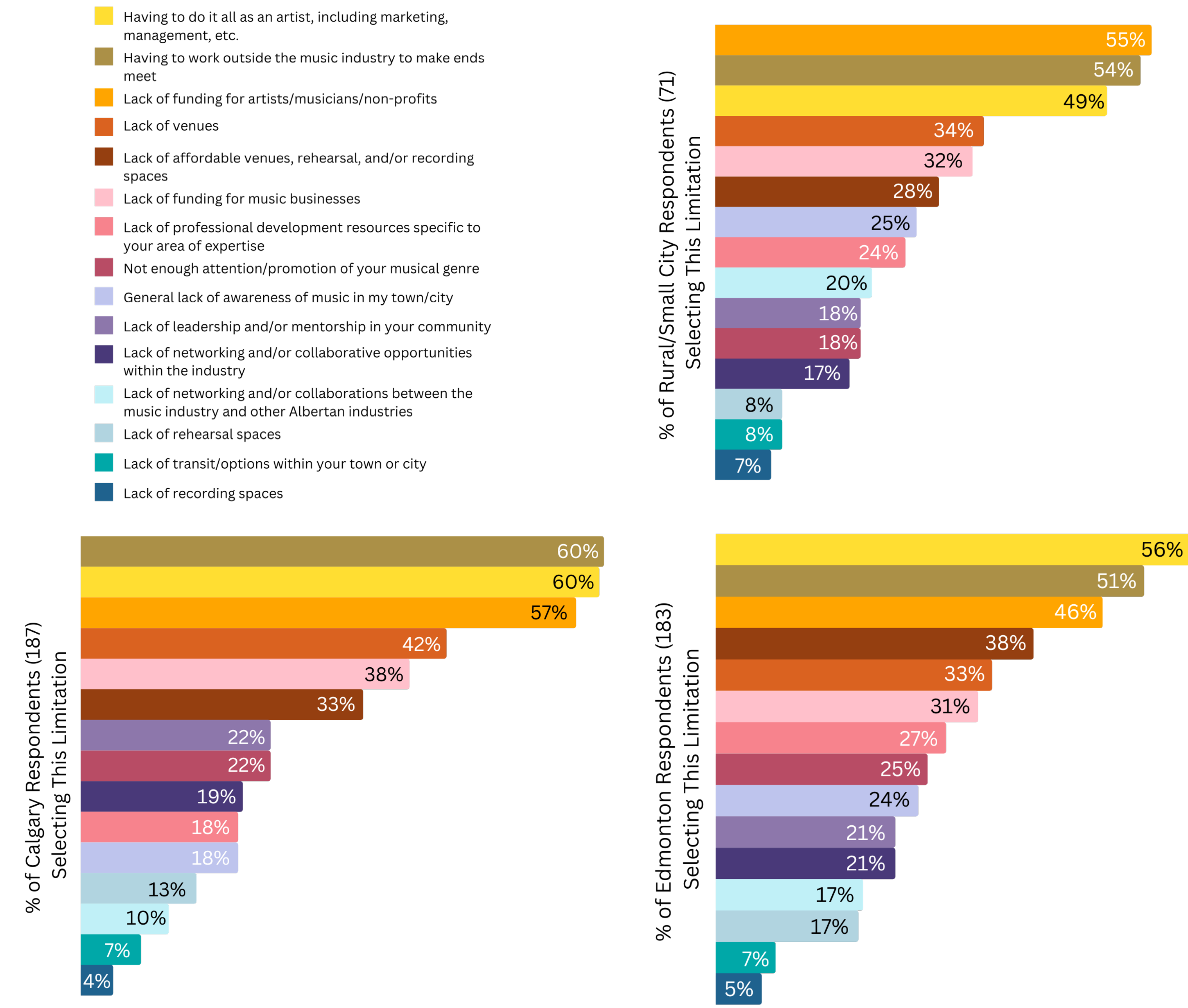


- A substantially larger proportion of equity-denied participants compared to others said that "Yes" they had felt unable to thrive in their career in the music industry (39% versus 9%)
- This highlights the need to actively address issues of diversity, equity, and inclusion.
- It also suggests one major challenge to addressing these issues is that a large proportion of music industry members do not experience barriers along these lines, making it harder to recognize and address without listening carefully to impacted industry members—which includes gathering data in a manner that allows for sensitivity to diversity.

Given that our deliverables are regionally based, we wanted to determine if there were notable differences in responses depending on where participants were based (i.e., Edmonton, Calgary, Rural/Small City Alberta). See how these groups answered questions 11, 12, and 15 below.



- Although the order of strengths selected varies slightly between Calgary, Edmonton, and Rural/Small City Alberta, the proportion of participants selecting the various strengths was generally quite similar.
- The greatest difference was around "Availability of venues" in which only 15% of participants from Rural/Small City Alberta selected this as a strength, whereas Calgarians and Edmontonians selected it at higher rates (28% and 24%).



- Across all three geographic groups, the top three issues were "Lack of funding for artists/musicians/non-profits", "Having to work outside the music industry to make ends meet", and "Having to do it all as an artist, including marketing, management, etc."
- A larger proportion of Calgarians (60%) selected "Lack of funding for artists/musicians/non-profits" as a barrier compared to Edmontonians (46%). This appears to match up with small group findings in which Edmonton was described as providing good funding for artists (participants in Rural/Small City Alberta 55%).
- "Having to do it all as an artist, including marketing, management, etc." was less often selected as a barrier by participants from Rural/Small City Alberta (49%) compared to Calgary and Edmonton participants (60% and 56%)
- Higher proportions of Edmontonians and participants from Rural/Small CIty Alberta (17% and 20%) selected "Lack of networking and/or collaborations between the music industry and other Albertan industries" as a limitation to thriving. Only 10% of Calgary based participants selected this.
- A smaller proportion of participants from Rural/Small City Alberta (28%) selected "Lack of affordable venues, rehearsal, and/or recording spaces" as a barrier compared to those from Calgary (33%) and Edmonton (38%).

- A slightly higher proportion of participants from Edmonton (32%) indicated that "Yes" they had been unable to thrive in the music industry compared to participants from Calgary and Rural/Small City Alberta (25% and 21%).

Notable differences from other demographic comparisons (based on cross-tabulations available in Appendix E) are listed below. Group responses differing by a proportion of at least 10% or more are noted. During analysis there were many categories so small that comparisons could not be meaningfully made between different demographic groups. In these cases, where possible, new categories were created in which too small of demographic groups were combined to improve analysis. This reduces the ability to draw conclusions about specific groups, but still allows for a general sense of similarities or differences between answers of differently-identifying groups. Readers can find a discussion of these combined groups near the beginning of Appendix E.

Gender Identity (see tables 9-12, Appendix E)

- A larger proportion (26%) of Gender-diverse, Nonconforming, Queer People and Women (cisgender) selected "Leadership and/or mentorship in your community" as a support in thriving compared to 9% of Men (cisgender). Mentorship may provide greater support to those potentially facing barriers in their music careers owing to gender identity.
- In terms of perceived limitations to thriving in the music industry Gender-diverse, Nonconforming, Queer People and Women (cisgender) chose "Lack of venues" (27%) less frequently than Men (cisgender) (44%), but they selected "Lack of affordable venues, rehearsal, and/or recording spaces" (40%) more often than Men (cisgender) (30%). This could indicate that affordability may be a larger barrier to thriving for Gender-diverse, Nonconforming, Queer People and Women (cisgender). Additionally, providing funding for access will not necessarily address the need for more venues in total.
- A substantially larger proportion (48%) of Gender-diverse, Nonconforming, Queer People and Women (cisgender) said "Yes" to feeling unable to thrive based on their sexual orientation, gender, spirituality, racial and/or ethnic identity, or ability during their career compared to Men (cisgender) (12%).

Racial Identity (see tables 13-16, Appendix E)

- No notable differences in terms of strengths/supports for thriving between the FNMI*, Black, Brown, Person of Colour and White Canadian/European groups.
- A higher proportion (68%) of FNMI, Black, Brown, Person of Colour participants indicated "Having to do it all as an artist, including marketing, management, etc." as a barrier to thriving in the music industry compared to 54% of White Canadian/European participants.
- Forty-five percent (45%) of FNMI, Black, Brown, Person of Colour participants answered "Yes" to feeling unable to thrive based on their sexual orientation, gender, spirituality, racial and/or ethnic identity, or ability during their career compared to White Canadian/European participants (22%).

* FNMI = First Nation, Métis and/or Inuit

Role in the Music Industry (see tables 17-20, Appendix E)

- A larger proportion of Artist/Performers (20%) selected "Availability of recording spaces" as a strength/support to thriving compared to 9% of Music Business Workers.
- Perhaps to be expected, Music Business Workers more frequently selected "Lack of funding for music businesses" (44%) as a barrier to thriving than Artist/Performers (32%).
- In contrast to the above point, it was Artist/Performers who more frequently selected "Lack of funding for artists/musicians/non-profits" (56%), "Having to work outside the music industry to make ends meet" (60%) and "Having to do it all as an artist, including marketing, management, etc." (67%) compared to Music Business Workers (40%, 41%, 21%). Given that Music Business Workers did not identify as artists or performers, it makes sense that they would be far less impacted by "Having to do it all as an artist" and artist funding.
- Despite the different proportions of response, both groups clearly recognize that funding for artistic and music business activities is important to a thriving music scene.

Years in the Music Industry (see tables 21-24, Appendix E)

- More Established Career participants selected "Earning enough within the music industry to make ends meet" (21%) compared to Emerging Careers (10%) and Mid-career (6%). This likely reflects some of the opportunities, connections, and established audience/client base resulting from many years experience. It's important to note that it was still less than a quarter of Established Career participants who selected this strength.
- A larger proportion of Emerging Career participants (25%) selected "Leadership and/or mentorship in your community" as a support to their thriving in their career compared to Mid-career (12%) and Established Career (15%) participants. This may indicate that mentorship programs can offer the greatest impact when targeted at emerging artists and music professionals.
- A larger proportion of Established Career (40%) selected "Lack of venues" as a limitation to their thriving in the music industry compared to Emerging Career (30%) and Mid-Career (33%) participants.
- Mid-career and Established Career participants more frequently selected "Lack of affordable venues, rehearsal, and/or recording spaces" (42% and 33%) "Lack of funding for artists/musicians/non-profits" (56% and 55%) and "Having to do it all as an artist, including marketing, management, etc." (58% and 55%) compared to Emerging Career participants (28%, 43% and 48%). This suggests that common barriers to thriving continue across music careers, pointing to the importance of support and resources for music industry workers across the career-span.
- Finally, a higher proportion of Emerging Career and Mid-career participants selected "Lack of leadership and/or mentorship in your community" (26% and 27%) as a limitation to their thriving compared to Established Career Participants (15%). This potentially reflects that participants further into their careers are sitting in leadership roles or have less desire/need for mentorship.
- A higher proportion of Emerging Career participants (40%) said they have felt unable to thrive in the music industry compared to Mid-career (27%) and Established Career (24%) participants. It's difficult without additional analysis to determine if this may be a reflection of greater diversity among Emerging Career participants or some other factor. It is also possible that as artists and professionals become more established they are more likely to have the resources or clout to overcome some barriers.

Final Notes on the Survey Insights

While cross-tabulations have revealed some interesting differences in responses, the most telling difference was in terms of who felt they were unable to thrive based on their sexual orientation, gender, spirituality, racial and/or ethnic identity, or ability. In every case, more people identifying with marginalized or equity-denied groups indicated they felt unable to thrive in the music industry compared to those who identified otherwise. While defining any group as "marginalized" or "equity-denied" is imperfect and incomplete, the exercise has helped establish that segments within the Albertan music industry do indeed feel less able to thrive than others, indicating the importance of ongoing equity, diversity and inclusion work.

Responses from the three geographic groups (Calgary, Edmonton and Rural/Small City Alberta) showed a great deal of similarity. This reflects insights from the small groups in which the proposed frameworks for each city's strategic plan were determined to be essentially the same with similar priorities.

ENGAGEMENT THREE: RURAL JURISDICTIONS

This engagement activity supported the creation of the provincial "Toolkit".

OBJECTIVES:

1. Take a snapshot of how music is perceived among local leadership in rural Alberta.
2. Using the eight areas of music identified in previous research, take a more in-depth look at how music is perceived among all participants.
3. Gather input on what is perceived as the most valuable tools or resources for supporting music in rural Alberta right now.

METHODS:

An initial search of music in small towns, cities, and rural jurisdictions revealed a general lack of specific information and tools—underlining the need for targeted engagement. A qualitative, in-depth method was selected: one-on-one interviews (each about 25 to 45 minutes long) using a combination of close- and open-ended questions. To maximize the response rate, respondents were given the option to fill the form out themselves and submit by email. All participants were given the same set of questions. The form is shared in Appendix F.

IMPLEMENTATION:

Purposive sampling was used to ensure a mixture of local government, chamber of commerce, and music artist/business member input. Fifteen jurisdictions across Alberta were selected—twelve with populations over 30,000, two that had higher counts of music events based on searches done in phase two (Banff and Canmore) and one particularly well-known music event (Big Valley Jamboree in Camrose). Contacts were found for local chambers of commerce, city/town councils, and 1-2 local music contacts (e.g., festival producers, musicians, music venue operators, non-profit music/arts organization leaders). Of 54 individuals/organizations contacted (all contacted at least 3 times unless they replied they were unavailable), there were 23 interviews conducted and/or forms submitted (10 participated by interview and 13 self-submitted forms). A list of participants and organizations reached is provided in Appendix G. Answers were reviewed by two research team members and analyzed for themes arising under each question.

INSIGHTS GLEANED:

Objective One

Based on this objective, we included town/city council members and local chambers of commerce in our contact list. We heard from five chambers of commerce representatives and nine city/town council representatives including two mayors, four councillors, and three staff members (a Culture & Heritage Team Leader, a Tourism Development Officer and a Tourism and Marketing Coordinator). Some chambers and councils had difficulty directing the Bird Creatives researchers to the right contact, with two chamber contacts suggesting that music was not really within Chamber of Commerce purview. Given that all these jurisdictions have local music businesses this suggests there may be an opportunity for chambers of commerce to better engage with them.

Of the 13 City/Town Council and Chamber of Commerce respondents:

- 3 selected "We've got a few "music" things, but not well known or popular."
- 8 selected "We've got a lively music scene that some folks are aware of."
- 2 selected "Music is our jam! It contributes socially and economically."

Overall, participants share a positive view of the presence and role of music in their towns and cities. When asked to expand on "actions, policies, or bylaws your town/city has in place to support music" those positive about their local music scenes mentioned easy permitting processes (e.g., busking permit, access to outdoor performance spaces), city/town funding toward events and initiatives, local audience interest, and availability of well-equipped (e.g., power, sound, seating, bathrooms nearby) indoor and outdoor venues and performance opportunities in local businesses.

While some people mentioned being unsure of specific actions supporting music in their town, they were able to point to challenges in the form of lack of funding at the city or town level, cumbersome permitting processes, lack of promoting/advertising support, and outdated or unequipped venues. Overall, comments were closely aligned with those from local music contacts (e.g., festival producers, musicians, music venue operators, non-profit music/arts organization leaders).

Objective Two

Respondents were asked about eight broad areas previously identified in secondary research as possible priority areas to focus on for growth in music or to help raise the profile of music. Respondents were asked whether these were already part of their local music scene and if yes, in what ways. Folks had plenty to share.

We've summarized participants' notes and quotes into bullet points below (in no particular order). We've split them between participants describing "yes this is present" and "no, this is not present".

Music Tourism can be leveraged to draw in visitors and their tourism dollars. Music tourism includes revenue from concerts and festivals as well as merchandise, and money spent on hotels, transportation, and restaurants – not to mention the additional jobs created in hospitality.

Present	Not Present
• A mixture of venues are available (both indoor and outdoor) • Major music festivals and events draw in visitors • Positive economic impacts on local businesses like hotels and restaurants • Local use of a Destination Marketing Fee (DMF) • City/town council shows support through: » Equipping public venues for music shows (e.g., sound systems, power, bathrooms) » Affordable/subsidized rental rates of public venues » Facilitating connections with local businesses and organizations outside the city/town » Incorporating music into tourism plans and activities » Promotion, advertising, and/or marketing support	• Locals lack knowledge about the music scene • Negative perceptions of particular genres and/or music events (especially challenging if held by town/city council members) • Lack of funding or no funds dedicated to music/arts events • Fierce competition with larger cities in close proximity (i.e., locals may pay for a show in the "city", but not at home) • Lack of collaboration between chambers of commerce and town councils to support music events and businesses

Relationships and Networking is about fostering and nurturing connections and relationships within and across industries or sectors. This includes connections to adjacent industries in the creative economy like film, marketing, the arts, software development, and other forms of entertainment, as well as to other industries such as tourism, sports, and health (e.g., expressive therapies).

Present	Not Present
• Musicians and arts communities are present and actively building community • City/town councils and chambers of commerce take active roles, for example: » Facilitating relationships between music and local businesses and organizations » Creating hubs for the creative community to gather and share ideas (e.g., a local annual arts conference) » Supporting (administratively and through funding) bids to host conferences and awards shows » Hosting "town halls" with music and arts organizations to identify needs and opportunities for improvement » Fostering relationships to attract more events	• Lack of connection between the creative community and local businesses and organizations • Little to no representation of the music industry on city/town council and in chambers of commerce • Little appreciation for the impacts of music (economically and socially)

Regulatory & Government Support includes building relationships with governments at all levels - municipal, provincial, and federal to create supportive policies that are aligned and integrated with government strategies and priorities. For example, ensuring that the interests of the music industry are represented in city/town planning and space making or that grant funding is co-developed with the music industry including eligibility criteria and outcomes that make sense to the industry.

Present	Not Present
• City/town council provides funding and grants (almost all participants identified this as a key sign of supportive government) • Funding is flexible: » Small and large amounts available » For various activities (e.g., events, professional development) » For individuals and organizations (e.g. a local arts council) » Cover various costs (i.e., artist pay, admin fees, venue and sound equipment rental, etc.) • Valuable in-kind support from city/town councils: » External marketing » Leveraging relationships with tourism organizations like Go East of Edmonton and Travel Alberta » Making services available for events & festivals (i.e., public washrooms, power access, etc.) • Hiring local musicians for civic events • Support on provincial and federal grant applications (e.g., letters of recommendation) • Discounted rates applied to arts and cultural spaces to increase accessibility (many towns have this for community recreation centres) • Involvement of local music scene members in decision making conversations	• Little or no funding available municipally for music events/projects • Strict funding requirements (e.g. that events must show a deficit to receive funding or must be tied to specific goals) • Little to no consultation with arts & culture partners—can result in policies with unintended consequences • Lack of performance venues • Slow and/or difficult permit processes (these can deter organizers) • Negative perceptions of particular genres and/or music events can reduce the support made available and to whom

People is meant to highlight the need to ensure that ALL people in the music industry have the opportunity to participate, including access and opportunities for equity-denied groups, as well as ensuring livability and affordability for artists and industry folks.

Present	Not Present
• Grants, funding, residencies awarded with equity and inclusion in mind • Festivals and music events are organized with equity and inclusion in mind (e.g., consider accessibility of venues, eligibility requirements for festival performers, etc.) • Affordable cost of living cited as a major boon in some towns and cities interviewed • Artists are present and performing on a regular basis • Diverse artists and types of music on display	• Funding/grant opportunities not well advertised, favouring only well-connected individuals • Shortage of individuals with specialized skills or of equipment (e.g., sound engineers and production personnel) • Few people able to work in the music industry full time • Lack of networking or resource sharing between music industry members

Spaces and Places are quality venues and rehearsal spaces that can meet different needs for performers and musical genres (performing, rehearsing, recording and educating). Also included are outdoor spaces, both purpose built and parks, as well as community spaces or multi-purpose spaces where music is performed or practiced.

Present	Not Present
• A variety of indoor and outdoor spaces are available at different rates, and well-equipped (e.g., community halls, schools, arenas, churches, theatres, parks, restaurants, pubs, patios, and dedicated music venues, etc.) • Spaces are available for various music activities (rehearsal, performing, recording, collaborating, etc.) • Busking licenses can make more public spaces available to performers • Options for audience members include free and low-cost	• Lack of spaces that can be used for music related activities • Poor design and/or lack of equipment and maintenance at existing spaces • Existing venues seating is too small or too large for most events

Professional Development is meant to highlight the opportunities for people in the music industry to grow and learn, both in their craft and in the business of music. This includes music education (broadly speaking), business specific activities, helping people be aware of opportunities in the industry, and support for entrepreneurs and artists.

Present	Not Present
• Specialized music residencies • Supportive arts councils providing opportunities • Funding available for professional development opportunities (e.g., artist development grant) • Private and public music programs available for children, youth and adults • Mentorship opportunities available (for both artistic and business skills)	• People regularly have to leave their city/town to access training opportunities • Shrinking or even shutting down of existing music programs • Lack of knowledge about provincial and national opportunities and resources (e.g., Alberta Music, SOCAN, Canada's Music Incubator, etc.)

Social Benefit refers to the idea that music, the universal language of the human experience, connects us, heals us, and defines us. It adds to the social fabric and livability of communities and improves the overall quality of life for audiences.

Present	Not Present
• Music benefits (e.g., strengthening communities, improving local quality of life, aiding healing, enhancing learning outcomes, etc.) are recognized and spoken of • Music is intentionally incorporated into cultural and community events (e.g., local Treaty Day celebrations, Culture Days, etc.) • Music is understood as a valuable experience that has value to individuals and communities • Music festivals become community building events, bringing local citizens out to a shared experience • Private sponsorships of music events show the support of local and international businesses • Funding is provided to make music events available to the public for free or at affordable prices	• Comments indicated that social benefits are present, but not acknowledged in broader conversations around music in their town/city

Infrastructure encompasses all facets of the music industry that underpin the development, creation, marketing, selling and export of music through business activities by artists and music businesses.

Present	Not Present
• Strong local advertising of music events • Ongoing and new music events continue to take place • Evidence of many partnerships within and across the music scene	• Shortage of individuals/companies with specialized skills (e.g., sound engineers, production personnel, artists managers, promoters) • Facing increased costs for sourcing equipment from out of town • Few individuals able to work full time in music • Artists more dependent on the local government as industry resources are scarce or else seeking support in other jurisdictions • No policies or actions targeting development of music businesses

The preceding pages give a wonderfully localized view of what a "music city" looks like from a small town Albertan perspective. Respondents focused on the existence of local music spaces and flexible funding opportunities as key contributors to their local music scenes. There was strong consensus on the social benefits of music and keen interest in understanding and better communicating the economic benefits, especially in relation to tourism. Town and city councils alongside chambers of commerce are seen as having many potential roles in encouraging or stalling growth of local music.

On the other side, professional development and infrastructure were seen as missing from most small town music scenes. Given that the development of infrastructure is both time and resource consuming, it is unsurprising that this area is slower to develop in smaller-scale music scenes. Professional development needs often have locals going to bigger hubs (e.g., Edmonton or Calgary) seeking training and skill advancement. Identification of common gaps suggests a potential opportunity to share solutions and address issues collectively—this will be explored where possible in the toolkit. Can't be harder than a barn raising, right?

Objective Three

Recognizing that one of the struggles of small town music scenes is identifying resources and tools pertinent to their circumstances, we shared a list of potential resources/tools/information to get a sense of what would be considered useful and followed up with a second question about what would be most immediately valuable.

Four suggested resources/tools were selected as “most immediately valuable” by at least a third of respondents. These will guide our current searches and initial development of the toolkit. Context from objective two will help inform some of these as well (i.e., what it means to be a “music city” according to those who consider their town/city to be one):

- Orientation to what it means to be a music city and why it matters to small towns.
- Resources/guidance for creating a music town vision or angle or niche.
- Orientation to the kinds of roles a chamber of commerce/town council can play.
- The dollars and sense (pun intended!) behind music in small towns

An additional five resources/tools were ranked low in immediate value, but two thirds of respondents deemed they “would be useful to your town/city”. These suggest future research directions or resource/tool development opportunities:

- Examples of small town music success stories (to pull inspiration/ideas, build a case).
- Resources/guidance on assessing and understanding the current state of our town as a music city.
- Examples of policies, bylaws, or zoning for music used in other small towns/cities.
- Making your town a “must play” for touring musicians - why it matters and how to do it.
- Resources for growing music with an eye to justice, equity, diversity, and inclusion.

CONCLUSION

Hearing firsthand experiences has allowed us to ground our research in lived experience, and we are thankful for the opportunity to have heard from so many different members of Alberta’s music industry. Though challenging to make so many connections, it has also been incredibly valuable. Folks have offered insights, perspectives and experiences—inspiring and frustrating—that will enrich both the strategies and the provincial toolkit. We hope our gratitude is clear in how we have attempted to share the information we’ve gathered in an open and transparent way in this report. Our next steps are to bring the research and engagement of all the phase reports together into creating music city strategies for Calgary and Edmonton, and a toolkit to support the growth of music in rural and small city Alberta.

ACKNOWLEDGEMENTS

West Anthem and partners wish to sincerely thank all the participants who helped inform this rich exploration of music across our province. Individuals and organizations who participated in small groups and 1:1 interviews are listed in appendices B and G. Their generous gift of time and insights has grounded our research well. Additionally, we owe thanks to 445 survey respondents, whose combined responses fleshed out our findings amazingly. Thank You!

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Page 36- Kate Stevens in Studio, Photo Credit: Benjamin Longman

APPENDICES

Appendix A: West Anthem Music City Strategies Small Group Handout

Wondering why you're here?

We know the music industry in Alberta is a source of meaningful community, employment, and experiences for many Albertans. We believe it can be a key economic driver, a vehicle for diversification, a force for youth retention, and a lightning rod for tourism.

West Anthem was established to help stimulate the growth and sustainability of Alberta's music industry. Currently, that takes the form of developing music city strategies for Edmonton and for Calgary. We're building on the Ecosystem Report published in 2020, updating our findings, and completing secondary research. We need to check in with other industry advocates and leaders to ensure that the final strategies will resonate.

Our Ask: Help us build the most meaningful strategies for Edmonton and for Calgary by answering these questions based on your experiences and perspective. Each additional voice fleshes out our understanding of the needs, opportunities, and challenges while informing the character and shape of these strategies.

See more about this work here: westanthem.com/musiccitystrategies/

Thanks for agreeing to participate in our small group! To increase the opportunity for meaningful conversation in the small group, we've prepared a brief document with the questions we will ask so you know exactly what is coming your way!

The questions refer to both Edmonton and Calgary, as we are hosting small groups and working on a strategy for both cities at the same time. Let the Bird Creatives note taker know if your answer applies to Edmonton, Calgary, both cities, or the province.

INTRODUCTION: (5 mins)

Please introduce yourself by sharing:

- your name/pronouns
- If you're based in Edmonton/Calgary or elsewhere
- Roles you have/had in the music industry
- how many years you've been in the music industry

ACTIVITY 1: SPECIAL SAUCE CONVERSATION (30 mins)

Special Sauce: "an element, quality, ability, or practice that makes something or someone successful or distinctive" (Mirriam Webster)

Music Cities is a concept that is growing in popularity. We, however, are not doing this to follow a trend. We recognize the value of music to our cities and province and want to build plans that will encourage sustainable growth in the music industry while emphasizing the unique offerings of each of our two largest cities.

1. **Take 2 min to think of a word or a simple phrase that, for you, describes Edmonton's or Calgary's music industry (or both).**
2. **Why should people come to Edmonton and/or Calgary (as opposed to other music cities) to be part of our music industries?**
3. **After hearing the above, does anyone have a new word or phrase to describe Edmonton's or Calgary's music industry (or both).**

Activity 2: Prioritize the "Areas" (40 mins)

We undertook a review of 17 current music city and provincial music strategies across Canada. Each plan organizes their priorities in different ways—pillars, strategic areas, focus areas, etc. These, in turn, help focus attention and determine measures or KPIs suggested in the plans. We found a number of "areas" that were consistently present across plans in various forms. We've collected them loosely into eight areas on the following page.

Take a few minutes to review the 8 areas on the following page.

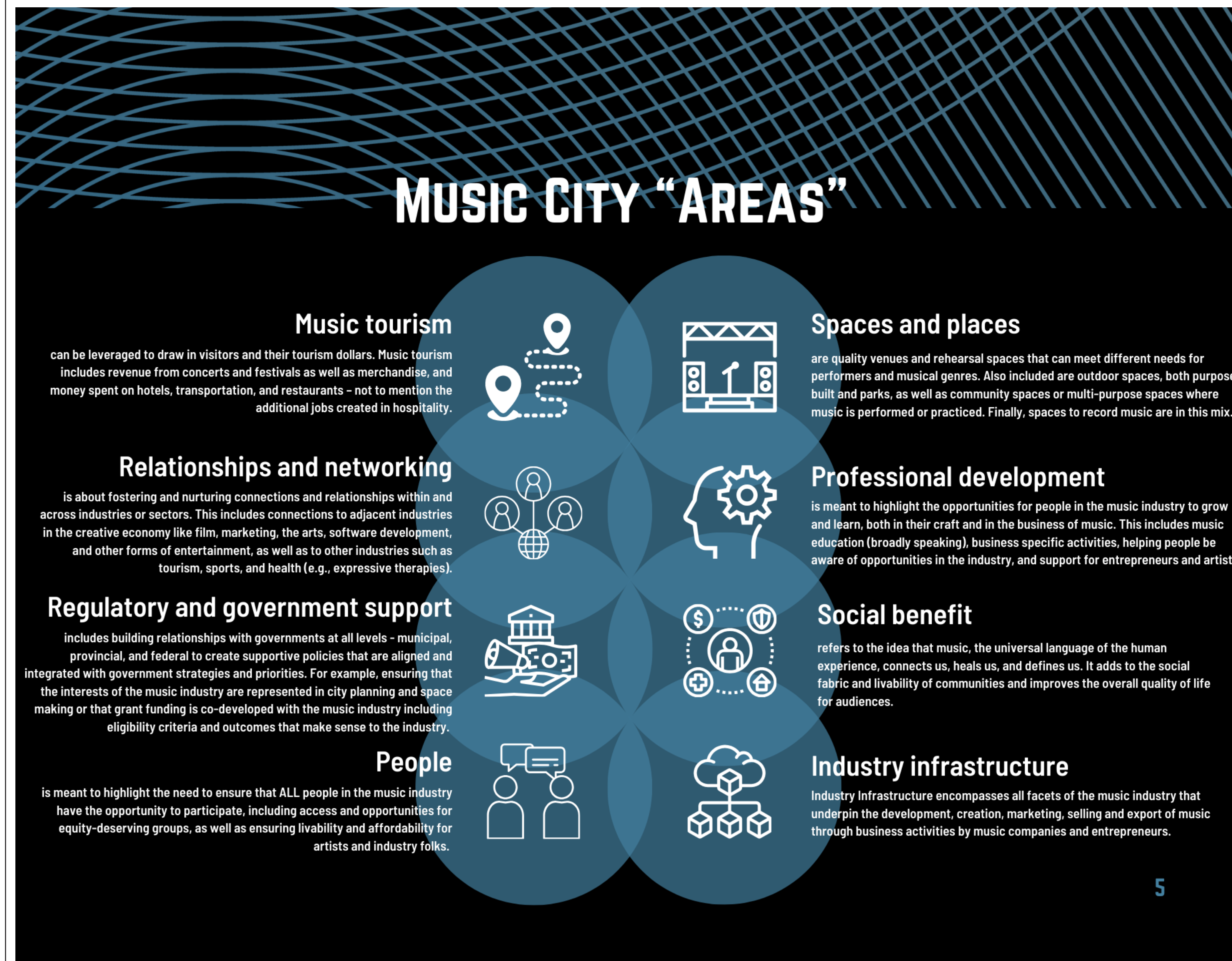
4. **Do any of these not fit in a plan for Edmonton/Calgary?**

5. **Does anything immediately come to mind as missing?**

   If yes, does it fit under any or connect to any of the existing areas?

6. **From the 8 areas on the following page, select three (in no particular order) that you see as important drivers for Edmonton/Calgary music industries right now. Which three and why?**

   What measures or KPIs have you used/would you like to see used to track progress in these areas? Why?



Activity 3: Review Opportunity Areas (10 mins)

West Anthem's 2020 Ecosystem Report highlighted 31 music industry opportunities across Edmonton, Calgary and the province. Reviewing these opportunities in 2022, ten showed little to no movement. We'll do a quick poll to determine if the group thinks these opportunities are still relevant to pursue right away, or if they should be set aside for now.

You will see a zoom poll appear on your screen with the name of the opportunity and a scale of 1 to 5:

1 — No longer relevant or not in scope
2 — Possibly relevant, but not a priority right now
3 — Neutral (or I do not know the jurisdiction well enough)
4 — Seems pretty important to me
5 — The music industry needs this!

Please Note: if an opportunity does not get addressed in the small group that you think is important or wish to expand on in conversation, feel free to reach out to Elyse (she/her) at elyse@bircreatives.com

Provincial opportunities to be scaled:

- Provincial Opportunity #2 Create Routine All-ages Events and Venues
- Provincial Opportunity #9 Work with Indigenous Communities to Integrate Indigenous Music Education Programs into Provincial Curriculums
- Provincial Opportunity #13 Organize and Implement Long-Term Artist Program (12 mos) that Provides Developing Artists with Professional Experiences, Educating Musicians on Career Development and Sustainability through a Practical Process
- Provincial Opportunity #16 Facilitate Permitting and Temporary Activation of Empty Buildings and Spaces to Create Cultural Offerings for Youth, Artists, and Musicians
- Provincial Opportunity #17 Facilitate Long-Term Creation of Music Spaces (Education, Rehearsal, Recording and Performing) through Incentives to Developers of New Projects and Redevelopers of Existing Buildings
- Provincial Opportunity #21 Offset the Costs of Booking International Artists by Drawing in Musicians to Record in Alberta through a Reimbursement Program

Municipal opportunities:

- Calgary Opportunity #3 Late Night Transit Strategy
- Edmonton Opportunity #4 Develop Edmonton Busking Guidelines
- Edmonton Opportunity #7 Strategically Coordinate Festivals Events, Dates and Plans, Allowing for More Engagement throughout the Year, Avoiding an Over Cluster of Offering
- Edmonton Opportunity#27 Organize and Promote Evening and Late-Night Transit Safety Strategies to Work in Conjunction With Late-Night Transit Service

Items where 75%+ participants mark 4 and/or 5 will have brief follow-up.

7. **What are 1-2 reasons why there hasn't been movement on opportunity [X]?**

7

Conclusion

Thank you SO much for participating in this small group. We're attempting to run nearly two dozen of these with presenters, producers, musicians, promoters, venue owners, music educators, engineers, manufacturers, association representatives, and funders from both Edmonton and Calgary.

We will gather all the data, analyze for where there is consensus and divergence, and present the findings to a group of leaders on June 5th. They will act as a check to ensure we've interpreted small groups accurately as well as offer additional context or information if gaps in data are identified.

From there we will develop a survey that will collect the final level of detail, confirming findings from the small groups and informing the broader music industry in Alberta about this work.

Then we hunker down at our desks and write inspiring, audacious, and implementable strategic plans for Edmonton and for Calgary (anticipated October/November 2023).

You are welcome to check in on our progress on our webpage: westanthem.com/musiccitystrategies/ where we will post our phase reports as they are completed. Results from engagement will come out in our Phase 3 report.

Simultaneously we are reaching out to music industry representatives across the province to hear what tools or supports would be most useful to smaller municipalities and rural jurisdictions. If you have a specific contact/event/venue you think we need to reach out to please feel free to send a suggestion to Elyse (she/her) at elyse@birdcreatives.com

Prepared by:

BIRD CREATIVES

Appendix B: Individuals and Organizations reached in Engagement One

Individuals and Organizations reached in Engagement One

Representative	Organization/Business/Position
Nuela Charles	Artist
Arlo Maverick	Artist
Colleen Brown	Artist
Dan Northfield	Palomino Smokehouse
Cam Hayden	Edmonton Blues Festival
Tricia Edwards	Calgary Musicians Association
Amanda Gregoire	All Good Promotion and Marketing
Liam Prost	Breakout West Tamarack Records
Sylvie Theriault	Regroupement artistique francophone de l'Alberta (RAFA)
Bill Hanson	H Factor Productions
Lindsey Walker	Artist
Audrey Ochoa	Artist
Sare	Artist
Leshan Masikonte (Melafrique)	Artist
Jason Flammia	Arts Development Consultant, Government of Alberta
Franca Gualtieri	City of Calgary

Individuals and Organizations reached in Engagement One

Representative	Organization/Business/Position
Misha Marie Nelson	Edmonton Arts Council
Charles Gordon	City of Edmonton
Krista Siebel	Cultural Industries, Government of Alberta
Derek Manns	Stagehand
Stephanie Hutchinson	Chronograph Records YYC Music Awards
Rebecca Windjack	Birthday Cake Media
Graham Lessard	National Music Centre
Emily Bachynski	Bitter North Sound
Brent Oliver	BOP MGMT & Consulting, Winterruption YEG
Shannon McNally	4th Street Lilac Festival
Kerry Clarke	Calgary Folk Music Festival
Cindy McLeod	Calgary International Blues Festival
Adam Oppenheim	Stampede Entertainment Inc.
Lisa Buck	BuckingJam Palace
Jessica Marsh	Neon Moon Records JAM Mgmt
Julijana Capone	National Music Centre

Individuals and Organizations reached in Engagement One

Representative	Organization/Business/Position
Peter Chapman	Fallen Tree Records
Jessi Toms	Muse Canada Inc.
Vish Khanna	CKUA
TAYLR	Artist
Yolanda Sargeant	Artist
John Armstrong	Old Strathcona Performing Arts Centre
Laurie Iverson	CKUA North Country Fair
Emmet Michael	Artist
Sahib Quraishi	The Factory Music & Arts LTD Night Vision Music
Vel Omazic	Canada's Music Incubator
Scott Henderson (Souls In Rhythm)	Artist
Dr. William Richards	MacEwan University
Rob Clarke	The Common
Alyssa Paterson	Edmonton Symphony Orchestra, Francis Winspear Centre for Music
Scott McTavish	Alberta Jubilee Auditoria, Government of Alberta
Julie Mirdoch	Calgary Sports and Entertainment Corporation

Individuals and Organizations reached in Engagement One

Representative	Organization/Business/Position
Kalyn Van Horne	Explore Edmonton
Daniel Cournoyer	La Cite Francophone
Rhea March	Artist Presenter, Live Performance Coach, Musician, Radio Host
Terry Wickham	Edmonton Folk Music Festival
Rob Cyrynowski	Livestar Entertainment Canada
Greg Curtis	Tooth Blackner Presents
Steve Derpack	JCL Productions
Craig Walsh	Gateway Events, SAIT Student Association
Daniel Go	National Music Centre
Josh Dalledonne	Arts Commons
Kodi Hutchinson	JazzYYC Chronograph Records
Leo Cripps	Calgary Reggae Festival
Cindy Nield	Calgary Reggae Festival
Sara Leishman	Calgary Folk Music Festival
Nich Davies	Hurry Hard Music
Carly Klassen	Alberta Music

*4 participants did not reply to our request to share their names and therefore remain anonymous. They represented one music venue, one artist, and two non-profit music/arts organizations.

Appendix C: Survey Questions

Note to Readers: Below is the survey text as it appeared in Google Forms, including edits made during the survey run (e.g., inclusions or corrections requested by respondents). All questions were mandatory to ensure completion, but always included a "Prefer not to say" response option.

Section 1 of 5

Who? We want to hear from folks (18yrs+) previously or currently employed in a role within Alberta's music industry. We are hoping to receive a minimum of 200 responses to the survey, but we are aiming for more! The survey closes Sept. 15, 2023.

What? West Anthem and Alberta Music, with funding from the Government of Alberta, are developing music city strategies for Calgary and Edmonton and a toolkit for smaller jurisdictions. This project has five phases. Phase one (report here) and phase two (report forthcoming) focused on secondary research to set the stage for meaningful engagement and a strong foundation for the strategy work.

Why? Developing effective strategies for our major municipalities and a toolkit for smaller jurisdictions is part of West Anthem's work advocating for music across the province. With these strategies, government, regulatory, and funding bodies can make decisions based on the real needs of music industry members and organizations and businesses and individuals can advocate together for greater impact. We value your time and opinions.

How? Yay surveys! This short, **17 question survey should take no longer than 15 minutes** to complete. Consent for this survey is completely voluntary and you are able to withdraw your consent from participating by exiting from the survey. You are able to select "Prefer not to say" for any questions that you do not wish to answer.

All participants who complete the survey and provide their email at the end will be entered into winning our prize draw. We've got a $100 Edmonton Downtown gift card, a sweet swag bag from CKUA, and more prizes on the way! One entry/prize per person, must be 18+ to win, selected winners will be contacted by the email provided and given five business days to reply to accept the prize. If there is no response within 5 business days, a new name will be drawn.

Additional Information

Where we currently are: We're working on phase three of this project: engagement. This included meeting with 69 individuals for some incredible insight on what to address in a strategy for music with industry infrastructure, professional development, and government and regulatory support emerging as priority areas. Now we're asking targeted questions to check on topics that arose in the process.

This survey does ask about systemic barriers in the music industry, this could be difficult to reflect on. Should you want to step away from the survey at any point, please do so. **If you wish to talk to someone, please reach out to the Alberta Mental Health Help Line at 1-(877)-303-2642 (toll free).**

Privacy and Confidentiality

Please note that once you have submitted your survey, your results will be anonymous and placed in the pool with others. When placing your email address in the survey, this provides less anonymity, however, the only individuals with access to direct survey data will be members of the Bird Creatives Inc. team administering the survey & prize draw. Bird Creatives is using the service of Google Forms to administer this survey.

Accessibility

If you have any issues in accessing or filling out this survey, feel free to reach out to Elyse at elyse@birdcreatives.com. We're happy to work together to make this an accessible process for you—we want to hear from you!

Do you consent to be part of the survey?

- ☐ Yes
- ☐ No

Section 2 of 5

Demographic Questions

We begin with demographic questions so we have an idea of who we've heard from through the process. This also helps us identify if differences or similarities exist in response patterns (i.e., perhaps music folks from Calgary will have different priorities to folks from small jurisdictions in the province).

For fill-able answers, Google Forms only allows us to use "Other" and does not always reflect the language Bird Creatives would choose.

1. What is your city of residence? (click all that apply). If your city is not listed, please let us know by clicking other.

Your responses will be part of creating two separate strategies for Calgary and Edmonton, and a toolkit for smaller jurisdictions, so it helps us to know "where" you're speaking from. If not Edmonton or Calgary, please share where under "Other..."

- ☐ Edmonton
- ☐ Calgary
- ☐ Prefer not to say
- ☐ Other...

2. What term(s) would you use to describe your gender identity? If the gender identity you identify as is not listed, please let us know by clicking another.

This question addresses diversity in the music industry and to show areas for growth and support.

- ☐ Agender
- ☐ Androgynous
- ☐ Bigender
- ☐ Woman (cisgender)
- ☐ Man (cisgender)
- ☐ Demigender
- ☐ Genderqueer/Gender Queer
- ☐ Graygender
- ☐ Gender Diverse
- ☐ Gender Fluid
- ☐ Gender non-conforming
- ☐ Non-Binary
- ☐ Omnigender
- ☐ Pangender
- ☐ Queer
- ☐ Third-Gender (3rd Gender)
- ☐ Transgender man/trans man
- ☐ Transgender woman/trans woman
- ☐ Transfeminine/trans femme
- ☐ Transmasculine/trans masc
- ☐ Two-Spirit
- ☐ Prefer not to say
- ☐ Other...

3. Do you self-identify as a member of the 2SLGBTQQIA+ (Two-Spirit, Lesbian, Gay, Bisexual, Transgender, Queer, Questioning, Intersex, Asexual, Plus) community?

This question addresses diversity in the music industry and to show areas for growth and support.

- ☐ Yes
- ☐ No
- ☐ Prefer not to say

4. What language(s) do you create, showcase, and/or perform music in? (click all that apply). If the language you make music in is not listed, please let us know by clicking other.

- ☐ An Indigenous language (such as Cree, Algonquin, Inuvialuktun)
- ☐ French
- ☐ English
- ☐ Spanish
- ☐ Mandarin
- ☐ Punjabi
- ☐ Cantonese
- ☐ Tagalog
- ☐ Prefer not to say
- ☐ Other...

5. Your current age bracket:

- ☐ 18-25
- ☐ 26-35
- ☐ 36-45
- ☐ 46-55
- ☐ 56-65
- ☐ 66-80
- ☐ >80
- ☐ Prefer not to say

6. How do you racially identify? (Please select all that apply). If your racial and/or ethnic identity is not listed, please let us know by clicking other.

This question addresses diversity in the music industry and to show areas for growth and support.

- ☐ Indigenous to Turtle Island and Inuit Nunangat (First Nations, Métis or Inuit)
- ☐ Latin American (e.g. Argentina, Mexico, Nicaragua)
- ☐ East Asian (e.g. China, Japan, Korea, Taiwan)
- ☐ Indo-Caribbean (e.g. Guyanese with origins in India)
- ☐ South Asian (e.g. India, Sri Lanka, Pakistan)
- ☐ Middle Eastern (e.g. Egypt, Iran, Israel, Saudi Arabia)
- ☐ South East Asian (e.g. Vietnam, Malaysia, Philippines)
- ☐ White Canadian or White America
- ☐ White European (e.g. England, Greece, Sweden, Russia)
- ☐ Black Canadian or African-American
- ☐ Black African (e.g. Ghana, Kenya, Somalia)
- ☐ Prefer not to say
- ☐ Other...

7. Are you currently employed in a role within the music industry (including self-employed)?

- ☐ Yes
- ☐ No
- ☐ Prefer not to say

8. What roles have you had within the music industry? (Check all that apply)

- ☐ Artist/Musician
- ☐ Composer/Songwriter
- ☐ Festival worker (admin, production, programming, etc.)
- ☐ Venue (owner, manager, admin, etc.)
- ☐ Sound technician
- ☐ Lighting technician
- ☐ Rigging
- ☐ Manager
- ☐ Sound Engineer
- ☐ Music Education (private or public)
- ☐ Record Label (owner, manager, admin, etc.)
- ☐ Music Manufacturers (records, instruments, equipment, etc.)
- ☐ Member of music related committees, boards, or associations
- ☐ Promotors
- ☐ Agent
- ☐ Publicist
- ☐ Radio
- ☐ Music Marketing
- ☐ Musical Theatre Production & Performance
- ☐ Music Store (owner, managers, admin, etc.)
- ☐ Music equipment rental company (owner, manager, admin, etc.)
- ☐ Funder or music funding related role
- ☐ Music Publisher
- ☐ I also hold roles outside the music industry
- ☐ Prefer not to say
- ☐ Other...

9. How many years have you been in the music industry?

- ☐ <3
- ☐ 3-5 years
- ☐ 6-10 years
- ☐ 11-15 years
- ☐ 16-20 years
- ☐ 21-25 years
- ☐ >25 years
- ☐ Prefer not to say

10. Are you currently a Canadian Citizen or Permanent Resident?

This question addresses diversity in the music industry and to show areas for growth and support.

- ☐ Yes
- ☐ No
- ☐ Prefer not to say

Section 3 of 5

11. What are some of the greatest limitations for your thriving in the music industry currently? (choose up to 6)

- ☐ Lack of venues
- ☐ Lack of rehearsal spaces
- ☐ Lack of recording spaces
- ☐ Lack of affordable venues, rehearsal, and/or recording spaces
- ☐ Population of your geographic area
- ☐ Lack of funding for music businesses
- ☐ Lack of funding for artists/musicians/non-profits
- ☐ Having to work outside the music industry to make ends meet
- ☐ Having to "do it all" as an artist, including marketing, management, etc.
- ☐ Lack of leadership and/or mentorship in your community
- ☐ Not enough attention/promotion of your musical genre
- ☐ Lack of professional development resources specific to your area of expertise
- ☐ Lack of networking and/or collaborative opportunities within the industry
- ☐ Lack of networking and/or collaboration between the music industry and other Albertan industries
- ☐ Distance from larger cities (i.e., Edmonton or Calgary)
- ☐ Lack of transit options within your town or city
- ☐ General lack of awareness of music in my town/city

12. What are some of the greatest strengths/supports for your thriving in the music industry currently? (Choose up to 6)

- ☐ Availability of venues
- ☐ Availability of rehearsal spaces
- ☐ Availability of recording spaces
- ☐ Affordability of venues, rehearsal, and/or recording spaces
- ☐ Population of your geographic area
- ☐ Sufficient funding for music businesses
- ☐ Sufficient funding for artists/musicians/non-profits
- ☐ Earning enough within the music industry to make ends meet
- ☐ Having access to managers and other resources needed
- ☐ Leadership and/or mentorship in your community
- ☐ Attention/promotion of your musical genre
- ☐ Availability of professional development resources specific to your area of expertise
- ☐ Availability of networking and/or collaborative opportunities
- ☐ Availability of networking and/or collaborations between the music industry and other Albertan industries
- ☐ Proximity to larger cities (i.e, Edmonton or Calgary)
- ☐ Transit options within your town or city
- ☐ General support and awareness of music in my town/city

13. Where do you seek information (i.e., facts, statistics, trends) about the music industry or your segment of the music industry:

- ☐ I do not specifically research facts, statistics, or trends of the music industry
- ☐ Word of mouth
- ☐ Media (television, newspapers, online articles, podcasts, etc.O
- ☐ From local organization publications (i.e., Calgary Arts Development, Edmonton Arts Council, West Anthem, etc.)
- ☐ Government of Alberta publications
- ☐ Government of Canada/Statistics Canada publications
- ☐ Music Associations (e.g., Canadian Independent Music Association, Canadian Live Music Association, Alberta Music, Country Music Alberta, etc.)
- ☐ Unions (e.g., Canadian Federation of Musicians, etc.P
- ☐ International publications (e.g., International Federation of the Phonographic Industry IFP, etc.)
- ☐ Other/more specific sources I use for info on the music industry

14. What COVID-19 initiatives and strategies do you want to see adapted for longer-term application in the overall music industry?

(i.e., using park space for concerts, providing more funding opportunities to music businesses, supporting digital events) Max. 250 characters

Section 4 of 5

Diversity and Thriving in the Music Industry

15. In your career in the music industry, have you ever felt you were unable to thrive based on your sexual orientation, gender, spirituality, racial and/or ethnic identity, or ability?

This question is to see if you've experienced any barriers that might be addressed for others in the future.

- ☐ Yes, I feel like I have been unable to thrive in the music industry based on one of those factors
- ☐ No, I do not think I have been unable to thrive based on one of those factors.
- ☐ Unsure
- ☐ Prefer not to say

16. If you answered "Yes" to Question 15 (above), would you say you have felt unable to thrive based on your sexual orientation, gender, spirituality, racial and/or ethnic identity, or ability within the last twelve months?

- ☐ I did not answer "Yes" in Question 15
- ☐ Yes, I feel like I have been unable to thrive in the music industry based on one of those factors within the last twelve months
- ☐ Unsure
- ☐ Prefer not to say

17. What do you feel is the greatest barrier to success for those in the music industry who are members of marginalized collectives, including but not limited to, Black, Indigenous, People of Colour, 2SLGBTQQIA+, folks living with disabilities and/or who are neurodivergent?

If you wish to be included in the prize draw, please provide your email address here:

Section 5 of 5

Thank you for completing this short survey. Your contributions are truly appreciated. If you're passionate and want to keep up to date on what we're doing, please keep a tab on our webpage. Winners of the prize draws will be contacted Monday, Sept. 18, 2023.

Appendix D: Summary Table of Poll Results

Opportunity Areas	2.Provincial Opportunity: Create Routine All-ages Events and Venues	9.Provincial Opportunity: Work with Indigenous Communities to Integrate Indigenous Music Education Programs into Provincial Curriculums	13.Provincial Opportunity: Organize and Implement Long-Term Artist Program (12 mos) that Provides Developing Artists with Professional Experiences, Educating Musicians on Career Development and Sustainability through a Practical Process	16.Provincial Opportunity: Facilitate Permitting and Temporary Activation of Empty Buildings and Spaces to Create Cultural Offerings for Youth, Artists, and Musicians	17.Provincial Opportunity: Facilitate Long-Term Creation of Music Spaces (Education, Rehearsal, Recording and Performing) through Incentives to Developers of New Projects and Re-developers of Existing Buildings	21.Provincial Opportunity: Offset the Costs of Booking International Artists by Drawing in Musicians to Record in Alberta through a Reimbursement Program	3.Calgary Opportunity: Late Night Transit Strategy	4.Edmonton Opportunity: Develop Edmonton Busking Guidelines	7.Edmonton Opportunity: Strategically Coordinate Festivals Events, Dates and Plans, Allowing for More Engagement throughout the Year, Avoiding an Over Cluster of Offering	27.Edmonton Opportunity: Organize and Promote Evening and Late-Night Transit Safety Strategies to Work in Conjunction With Late-Night Transit Service
Total # of responses:	66	66	66	66	66	67	66	66	66	66
"1 - No longer relevant or not in scope"	2	0	0	2	0	5	0	1	0	1
"2 - Could be relevant, but not right now"	10	1	2	2	3	15	5	11	8	6
"3 - Neutral (or I do not know the jurisdiction well enough)"	14	11	20	14	18	23	30	34	31	26
"4 - Seems pretty important to me"	29	33	26	28	20	14	15	19	17	18
"5 - The music industry needs this!"	11	21	18	20	25	10	16	1	10	15
Average:	**3.56**	**4.12**	**3.91**	**3.94**	**4.02**	**3.13**	**3.64**	**3.12**	**3.44**	**3.61**

Appendix E: Survey Responses & Cross Tabulations

Important Notes on Reviewing these Tables

Recoding Multiple Responses to Demographic Questions
Gender, race, and role in the industry demographic questions permitted more than one answer. Double, triple or even quadruple coding individual responses for analysis was not possible, in which case we re-coded responses as sensitively as possible in order to make groups that might make meaningful comparisons possible (with a focus on comparing respondents likelier to experience privilege to respondents likelier to belong to an equity-denied group). Additionally, we combined some groups that would otherwise have been too small to compare. This reduces the ability to draw conclusions about specific groups, but still allows for a general sense of similarities or differences between answers of differently-identifying groups.

- **Gender Group** - All responses were organized into two main categories with gender diverse, gender-nonconforming, queer and cisgender women in one category and respondents only identifying as cisgender male in a second category. Given that there remains extensive data that women in general remain lower paid for the same work as cisgender men it appeared meaningful to include cisgender women alongside other potentially equity-denied group members.[1]
- **Racial Group** - Any combination including Black, Brown, Person of Colour, Inuit, Métis, or First Nation was grouped together. Those respondents only indicating "White Canadian or American" and/or "White European" formed a second group. For example, a response of "Latin American (e.g. Argentina, Mexico, Nicaragua), South East Asian (e.g. Vietnam, Malaysia, Philippines), White Canadian or White America" would be put into the first group. In the case of responses that did not denote a racial identity (e.g., "Canadian" or "Human Being"), these were excluded alongside "Prefer not to say" responses (since we can not draw conclusions about this group).
- **Role in the Music Industry:** Respondents could select/input multiple answers and they did! Reflecting what we'd heard in small groups, the vast majority of respondents held 3 or more roles within the music industry. For coding, if the respondent indicated any artist/musician/performing role (along with any other combination) they were grouped together. Folks who did not indicate any artist/musician/performing role formed a second group called "Music Business Workers". We compared these two groups to get a sense of differences between those working on the artistic side and those more exclusively on the business side.

Excluding "Prefer not to say" Responses
Where respondents chose "Prefer not to say", those answers are excluded in the cross tabulation tables. For example, if someone said "Prefer not to say" when asked about gender identity, they could not be placed into a group so researchers could not draw conclusions from their responses about any particular group. Responses were included with any other question to which they did respond to (e.g., if the same respondent did indicate a geographic location then their responses are included in those cross-tabulations). **For this reason, a number of cross tabulations have less than 445 total responses.**

Navigating the Tables
Tabled responses for survey questions 11, 12, 13, and 15 are presented below. The first set of tables shows all responses (Tables 1-4). These were then cross-tabulated by groups identified by geography (Tables 5-8), gender (Tables 9-12), race (Tables 13-16), role in the music industry (Tables 17-20), years in the music industry (Tables 21-24), and an added code around equity-denied status (Tables 25-28).[2]

1 Canadian Women's Foundation. "The Facts about the Gender Pay Gap" Retrieved from: https://canadianwomen.org/the-facts/the-gender-pay-gap/
2 Although more demographic questions were asked, some analyses were dropped based on factors such as too small comparison groups (e.g., only three respondents said "no" to question 10 "Are you currently a Canadian Citizen or Permanent Resident?" making a comparison of "yes" responses to "no" responses less meaningful) and limited context for responses (e.g., no way to determine if current employment status was a temporary state or long-term).

TABLE 1 - STRENGTH ANALYSIS

Perceived Strength	All Respondents (n=445)	
Availability of venues	108	24%
Availability of rehearsal spaces	44	10%
Availability of recording spaces	78	18%
Affordability of venues, rehearsal, and/or recording spaces	31	7%
Sufficient funding for music businesses	27	6%
Sufficient funding for artists/musicians/non-profits	51	11%
Earning enough within the music industry to make ends meet	67	15%
Having access to managers and other resources needed	27	6%
Leadership and/or mentorship in your community	70	16%
Attention/promotion of your musical genre	69	16%
Availability of professional development resources specific to your area of expertise	37	8%
Availability of networking and/or collaborative opportunities	112	25%
Availability of networking and/or collaborations between the music industry and other Albertan industries	44	10%
Transit options within your town or city	63	14%
General support and awareness of music in my town/city	131	29%

TABLE 2 - LIMITATION ANALYSIS

Perceived Limitation	All Respondents (n=445)	
Lack of venues	164	37%
Lack of rehearsal spaces	62	14%
Lack of recording spaces	22	5%
Lack of affordable venues, rehearsal, and/or recording spaces	152	34%
Lack of funding for music businesses	152	34%
Lack of funding for artists/musicians/non-profits	232	52%
Having to work outside the music industry to make ends meet	248	56%
Having to do it all as an artist, including marketing, management, etc.	252	57%
Lack of leadership and/or mentorship in your community	93	21%
Not enough attention/promotion of your musical genre	100	22%
Lack of professional development resources specific to your area of expertise	101	23%
Lack of networking and/or collaborative opportunities within the industry	86	19%
Lack of networking and/or collaborations between the music industry and other Albertan industries	67	15%
Lack of transit/options within your town or city	32	7%
General lack of awareness of music in my town/city	96	22%

TABLE 3 - INFORMATION SOURCES

Information Source	All Respondents (n=445)	
I do not specifically research facts, statistics, or trends of the music industry	90	20%
Word of mouth (colleagues, co-workers, friends, etc.)	319	72%
Media (television, newspapers, online articles, podcasts, etc.)	225	51%
From local organization publications (i.e., Calgary Arts Development, Edmonton Arts Council, West Anthem, etc.)	172	39%
Government of Alberta publications	40	9%
Government of Canada/Statistics Canada publications	38	9%
Music Associations (e.g., Canadian Independent Music Association, Canadian Live Music Association, Alberta Music, Country Music Alberta, etc.)	205	46%
Unions (e.g., Canadian Federation of Musicians or local unions, etc.)	40	9%
International publications (e.g., International Federation of the Phonographic Industry IFPI, etc.)	40	9%

TABLE 4 - IDENTITY CHALLENGES

Identity Challenges	All Respondents (n=445)	
No, I do not think I have been unable to thrive based on one of those factors. (listed factors: sexual orientation, gender, spirituality, racial and/or ethnic identity, or ability)	262	59%
Prefer not to say	17	4%
Unsure	45	10%
Yes, I feel like I have been unable to thrive in the music industry based on one of those factors.	121	27%
Of those who said "Yes", 78 (64%) then said they have been unable to thrive in the music industry based on one of these factors in the last 12 months, indicating the ongoing and current nature of these issues.		

TABLE 5 - STRENGTH ANALYSIS BY GEOGRAPHY

Perceived Strength	Calgary (n=187)		Edmonton (n=183)		Rural/Small City (n=71)	
Availability of venues	53	28%	44	24%	11	15%
Availability of rehearsal spaces	17	9%	21	11%	6	8%
Availability of recording spaces	31	17%	31	17%	15	21%
Affordability of venues, rehearsal, and/or recording spaces	14	7%	11	6%	6	8%
Sufficient funding for music businesses	12	6%	12	7%	3	4%
Sufficient funding for artists/musicians/non-profits	26	14%	20	11%	5	7%
Earning enough within the music industry to make ends meet	36	19%	22	12%	9	13%
Having access to managers and other resources needed	12	6%	10	5%	5	7%
Leadership and/or mentorship in your community	24	13%	32	17%	13	18%
Attention/promotion of your musical genre	28	15%	31	17%	10	14%
Availability of professional development resources specific to your area of expertise	17	9%	16	9%	4	6%
Availability of networking and/or collaborative opportunities	41	22%	51	28%	19	27%
Availability of networking and/or collaborations between the music industry and other Albertan industries	20	11%	16	9%	7	10%
Transit options within your town or city	28	15%	30	16%	5	7%
General support and awareness of music in my town/city	53	28%	51	28%	25	35%

TABLE 6 - LIMITATION ANALYSIS BY GEOGRAPHY

Perceived Limitation	Calgary (n=187)		Edmonton (n=183)		Rural/Small City (n=71)	
Lack of venues	79	42%	60	33%	24	34%
Lack of rehearsal spaces	25	13%	31	17%	6	8%
Lack of recording spaces	7	4%	10	5%	5	7%
Lack of affordable venues, rehearsal, and/or recording spaces	61	33%	69	38%	20	28%
Lack of funding for music businesses	71	38%	57	31%	23	32%
Lack of funding for artists/musicians/non-profits	107	57%	84	46%	39	55%
Having to work outside the music industry to make ends meet	113	60%	93	51%	38	54%
Having to do it all as an artist, including marketing, management, etc.	112	60%	103	56%	35	49%
Lack of leadership and/or mentorship in your community	41	22%	39	21%	13	18%
Not enough attention/promotion of your musical genre	41	22%	46	25%	13	18%
Lack of professional development resources specific to your area of expertise	34	18%	50	27%	17	24%
Lack of networking and/or collaborative opportunities within the industry	35	19%	39	21%	12	17%
Lack of networking and/or collaborations between the music industry and other Albertan industries	19	10%	32	17%	14	20%
Lack of transit/options within your town or city	13	7%	13	7%	6	8%
General lack of awareness of music in my town/city	34	18%	44	24%	18	25%

TABLE 7 - INFORMATION SOURCES BY GEOGRAPHY

Information Source	Calgary (n=187)		Edmonton (n=183)		Rural/Small City (n=71)	
I do not specifically research facts, statistics, or trends of the music industry	33	18%	39	21%	17	24%
Word of mouth (colleagues, co-workers, friends, etc.)	141	75%	122	67%	54	76%
Media (television, newspapers, online articles, podcasts, etc.)	96	51%	91	50%	36	51%
From local organization publications (i.e., Calgary Arts Development, Edmonton Arts Council, West Anthem, etc.)	81	43%	68	37%	23	32%
Government of Alberta publications	15	8%	18	10%	7	10%
Government of Canada/Statistics Canada publications	14	7%	17	9%	7	10%
Music Associations (e.g., Canadian Independent Music Association, Canadian Live Music Association, Alberta Music, Country Music Alberta, etc.)	84	45%	89	49%	31	44%
Unions (e.g., Canadian Federation of Musicians or local unions, etc.)	19	10%	14	8%	6	8%
International publications (e.g., International Federation of the Phonographic Industry IFPI, etc.)	24	13%	14	8%	2	3%

TABLE 8 - IDENTITY CHALLENGES BY GEOGRAPHY

Identity Challenges	Calgary (n=187)		Edmonton (n=183)		Rural/Small City (n=71)	
No, I do not think I have been unable to thrive based on one of those factors.	110	59%	100	55%	48	68%
Prefer not to say	7	4%	9	5%	1	1%
Unsure	23	12%	15	8%	7	10%
Yes, I feel like I have been unable to thrive in the music industry based on one of those factors in the last 12 months.	47	25%	59	32%	15	21%

TABLE 9 - STRENGTH ANALYSIS BY GENDER GROUPS

Perceived Strength	Gender-diverse, Nonconforming, Queer and Women (cisgender) (n=183)		Men (cisgender) (n=233)	
Availability of venues	39	21%	63	27%
Availability of rehearsal spaces	16	9%	23	10%
Availability of recording spaces	22	12%	47	20%
Affordability of venues, rehearsal, and/or recording spaces	15	8%	13	6%
Sufficient funding for music businesses	9	5%	16	7%
Sufficient funding for artists/musicians/non-profits	20	11%	29	12%
Earning enough within the music industry to make ends meet	28	15%	35	15%
Having access to managers and other resources needed	11	6%	14	6%
Leadership and/or mentorship in your community	47	26%	22	9%
Attention/promotion of your musical genre	30	16%	37	16%
Availability of professional development resources specific to your area of expertise	26	14%	11	5%
Availability of networking and/or collaborative opportunities	49	27%	57	24%
Availability of networking and/or collaborations between the music industry and other Albertan industries	16	9%	25	11%
Transit options within your town or city	25	14%	36	15%
General support and awareness of music in my town/city	54	30%	71	30%

TABLE 10 - LIMITATION ANALYSIS BY GENDER GROUP

Perceived Limitation	Gender-diverse, Nonconforming, Queer and Women (cisgender) (n=183)		Men (cisgender) (n=233)	
Lack of venues	50	27%	103	44%
Lack of rehearsal spaces	28	15%	29	12%
Lack of recording spaces	12	7%	9	4%
Lack of affordable venues, rehearsal, and/or recording spaces	73	40%	71	30%
Lack of funding for music businesses	66	36%	76	33%
Lack of funding for artists/musicians/non-profits	104	57%	113	48%
Having to work outside the music industry to make ends meet	107	58%	127	55%
Having to do it all as an artist, including marketing, management, etc.	109	60%	129	55%
Lack of leadership and/or mentorship in your community	34	19%	51	22%
Not enough attention/promotion of your musical genre	41	22%	51	22%
Lack of professional development resources specific to your area of expertise	43	23%	51	22%
Lack of networking and/or collaborative opportunities within the industry	41	22%	41	18%
Lack of networking and/or collaborations between the music industry and other Albertan industries	30	16%	35	15%
Lack of transit/options within your town or city	15	8%	16	7%
General lack of awareness of music in my town/city	33	18%	58	25%

TABLE 11 - INFORMATION SOURCES BY GENDER GROUP

Information Source	Gender-diverse, Nonconforming, Queer and Women (cisgender) (n=183)		Men (cisgender) (n=233)	
I do not specifically research facts, statistics, or trends of the music industry	35	19%	48	21%
Word of mouth (colleagues, co-workers, friends, etc.)	131	72%	170	73%
Media (television, newspapers, online articles, podcasts, etc.)	95	52%	120	52%
From local organization publications (i.e., Calgary Arts Development, Edmonton Arts Council, West Anthem, etc.)	81	44%	76	33%
Government of Alberta publications	22	12%	11	5%
Government of Canada/Statistics Canada publications	17	9%	14	6%
Music Associations (e.g., Canadian Independent Music Association, Canadian Live Music Association, Alberta Music, Country Music Alberta, etc.)	89	49%	100	43%
Unions (e.g., Canadian Federation of Musicians or local unions, etc.)	18	10%	17	7%
International publications (e.g., International Federation of the Phonographic Industry IFPI, etc.)	12	7%	24	10%

TABLE 12 - IDENTITY CHALLENGES BY GENDER GROUP

Identity Challenges	Gender-diverse, Nonconforming, Queer and Women (cisgender) (n=183)		Men (cisgender) (n=233)	
No, I do not think I have been unable to thrive based on one of those factors.	73	40%	178	76%
Prefer not to say	4	2%	7	3%
Unsure	18	10%	21	9%
Yes, I feel like I have been unable to thrive in the music industry based on one of those factors in the last 12 months.	88	48%	27	12%

TABLE 13 - STRENGTH ANALYSIS BY RACIAL GROUP

Perceived Strength	White Canadian/ European (n=313)		FNMI*, Black, Brown, People of Colour (n=102)	
Availability of venues	82	26%	23	23%
Availability of rehearsal spaces	30	10%	12	12%
Availability of recording spaces	54	17%	17	17%
Affordability of venues, rehearsal, and/or recording spaces	24	8%	5	5%
Sufficient funding for music businesses	17	5%	9	9%
Sufficient funding for artists/musicians/non-profits	33	11%	15	15%
Earning enough within the music industry to make ends meet	46	15%	18	18%
Having access to managers and other resources needed	16	5%	10	10%
Leadership and/or mentorship in your community	50	16%	19	19%
Attention/promotion of your musical genre	45	14%	22	22%
Availability of professional development resources specific to your area of expertise	28	9%	9	9%
Availability of networking and/or collaborative opportunities	77	25%	27	26%
Availability of networking and/or collaborations between the music industry and other Albertan industries	29	9%	12	12%
Transit options within your town or city	43	14%	16	16%
General support and awareness of music in my town/city	97	31%	26	25%

*FNMI = First Nation, Métis, and/or Inuit

TABLE 13 - STRENGTH ANALYSIS BY RACIAL GROUP

Perceived Strength	White Canadian/ European (n=313)		FNMI*, Black, Brown, People of Colour (n=102)	
Availability of venues	82	26%	23	23%
Availability of rehearsal spaces	30	10%	12	12%
Availability of recording spaces	54	17%	17	17%
Affordability of venues, rehearsal, and/or recording spaces	24	8%	5	5%
Sufficient funding for music businesses	17	5%	9	9%
Sufficient funding for artists/musicians/non-profits	33	11%	15	15%
Earning enough within the music industry to make ends meet	46	15%	18	18%
Having access to managers and other resources needed	16	5%	10	10%
Leadership and/or mentorship in your community	50	16%	19	19%
Attention/promotion of your musical genre	45	14%	22	22%
Availability of professional development resources specific to your area of expertise	28	9%	9	9%
Availability of networking and/or collaborative opportunities	77	25%	27	26%
Availability of networking and/or collaborations between the music industry and other Albertan industries	29	9%	12	12%
Transit options within your town or city	43	14%	16	16%
General support and awareness of music in my town/city	97	31%	26	25%

*FNMI = First Nation, Métis, and/or Inuit

TABLE 14 - LIMITATION ANALYSIS BY RACIAL GROUP

Perceived Limitation	White Canadian/ European (n=313)		FNMI*, Black, Brown, People of Colour (n=102)	
Lack of venues	114	36%	39	38%
Lack of rehearsal spaces	44	14%	13	13%
Lack of recording spaces	13	4%	8	8%
Lack of affordable venues, rehearsal, and/or recording spaces	106	34%	36	35%
Lack of funding for music businesses	106	34%	37	36%
Lack of funding for artists/musicians/non-profits	161	51%	60	59%
Having to work outside the music industry to make ends meet	180	58%	57	56%
Having to do it all as an artist, including marketing, management, etc.	168	54%	69	68%
Lack of leadership and/or mentorship in your community	65	21%	18	18%
Not enough attention/promotion of your musical genre	61	19%	27	26%
Lack of professional development resources specific to your area of expertise	71	23%	24	24%
Lack of networking and/or collaborative opportunities within the industry	63	20%	19	19%
Lack of networking and/or collaborations between the music industry and other Albertan industries	45	14%	18	18%
Lack of transit/options within your town or city	25	8%	7	7%
General lack of awareness of music in my town/city	64	20%	24	24%

*FNMI = First Nation, Métis, and/or Inuit

TABLE 15 - INFORMATION SOURCES BY RACIAL GROUP

Information Source	White Canadian/ European (n=313)		FNMI*, Black, Brown, People of Colour (n=102)	
I do not specifically research facts, statistics, or trends of the music industry	61	19%	20	20%
Word of mouth (colleagues, co-workers, friends, etc.)	230	73%	72	71%
Media (television, newspapers, online articles, podcasts, etc.)	163	52%	54	53%
From local organization publications (i.e., Calgary Arts Development, Edmonton Arts Council, West Anthem, etc.)	121	39%	38	37%
Government of Alberta publications	23	7%	11	11%
Government of Canada/Statistics Canada publications	27	9%	4	4%
Music Associations (e.g., Canadian Independent Music Association, Canadian Live Music Association, Alberta Music, Country Music Alberta, etc.)	143	46%	48	47%
Unions (e.g., Canadian Federation of Musicians or local unions, etc.)	29	9%	6	6%
International publications (e.g., International Federation of the Phonographic Industry IFPI, etc.)	29	9%	4	4%

*FNMI = First Nation, Métis, and/or Inuit

TABLE 16 - IDENTITY CHALLENGES BY RACIAL GROUP

Identity Challenges	White Canadian/ European (n=313)		FNMI*, Black, Brown, People of Colour (n=102)	
No, I do not think I have been unable to thrive based on one of those factors.	214	68%	36	35%
Prefer not to say	8	3%	2	2%
Unsure	23	7%	18	18%
Yes, I feel like I have been unable to thrive in the music industry based on one of those factors in the last 12 months.	68	22%	46	45%

*FNMI = First Nation, Métis, and/or Inuit

TABLE 17 - STRENGTH ANALYSIS BY INDUSTRY ROLE

Perceived Strength	Artist/ Performer (n=341)		Music Business Worker (n=100)	
Availability of venues	88	26%	19	19%
Availability of rehearsal spaces	34	10%	10	10%
Availability of recording spaces	68	20%	9	9%
Affordability of venues, rehearsal, and/or recording spaces	27	8%	3	3%
Sufficient funding for music businesses	21	6%	6	6%
Sufficient funding for artists/musicians/non-profits	42	12%	8	8%
Earning enough within the music industry to make ends meet	56	16%	10	10%
Having access to managers and other resources needed	21	6%	5	5%
Leadership and/or mentorship in your community	55	16%	15	15%
Attention/promotion of your musical genre	53	16%	16	16%
Availability of professional development resources specific to your area of expertise	30	9%	7	7%
Availability of networking and/or collaborative opportunities	90	26%	21	21%
Availability of networking and/or collaborations between the music industry and other Albertan industries	34	10%	10	10%
Transit options within your town or city	50	15%	13	13%
General support and awareness of music in my town/city	93	27%	36	36%

TABLE 18 - LIMITATION ANALYSIS BY INDUSTRY ROLE

Perceived Limitation	Artist/ Performer (n=341)		Music Business Worker (n=100)	
Lack of venues	129	38%	31	31%
Lack of rehearsal spaces	53	16%	7	7%
Lack of recording spaces	14	4%	6	6%
Lack of affordable venues, rehearsal, and/or recording spaces	116	34%	35	35%
Lack of funding for music businesses	110	32%	44	44%
Lack of funding for artists/musicians/non-profits	190	56%	40	40%
Having to work outside the music industry to make ends meet	205	60%	41	41%
Having to do it all as an artist, including marketing, management, etc.	230	67%	21	21%
Lack of leadership and/or mentorship in your community	68	20%	24	24%
Not enough attention/promotion of your musical genre	86	25%	14	14%
Lack of professional development resources specific to your area of expertise	71	21%	29	29%
Lack of networking and/or collaborative opportunities within the industry	64	19%	22	22%
Lack of networking and/or collaborations between the music industry and other Albertan industries	50	15%	16	16%
Lack of transit/options within your town or city	24	7%	7	7%
General lack of awareness of music in my town/city	76	22%	18	18%

TABLE 19 - INFORMATION SOURCE BY INDUSTRY ROLE

Information Source	Artist/ Performer (n=341)		Music Business Worker (n=100)	
I do not specifically research facts, statistics, or trends of the music industry	73	21%	15	15%
Word of mouth (colleagues, co-workers, friends, etc.)	249	73%	68	68%
Media (television, newspapers, online articles, podcasts, etc.)	163	48%	60	60%
From local organization publications (i.e., Calgary Arts Development, Edmonton Arts Council, West Anthem, etc.)	129	38%	42	42%
Government of Alberta publications	33	10%	6	6%
Government of Canada/Statistics Canada publications	30	9%	8	8%
Music Associations (e.g., Canadian Independent Music Association, Canadian Live Music Association, Alberta Music, Country Music Alberta, etc.)	156	46%	47	47%
Unions (e.g., Canadian Federation of Musicians or local unions, etc.)	34	10%	6	6%
International publications (e.g., International Federation of the Phonographic Industry IFPI, etc.)	30	9%	10	10%

TABLE 20 - IDENTITY CHALLENGES BY INDUSTRY ROLE

Identity Challenges	Artist/ Performer (n=341)		Music Business Worker (n=100)	
No, I do not think I have been unable to thrive based on one of those factors.	202	59%	58	58%
Prefer not to say	13	4%	4	4%
Unsure	30	9%	14	14%
Yes, I feel like I have been unable to thrive in the music industry based on one of those factors in the last 12 months.	96	28%	24	24%

TABLE 21 - STRENGTH ANALYSIS BY YEARS IN INDUSTRY

Perceived Strength	Emerging 0-5 (n=81)		Mid-career 6-15 (n=124)		Established Career 16+ (n=229)	
Availability of venues	20	25%	31	25%	55	24%
Availability of rehearsal spaces	6	7%	11	9%	27	12%
Availability of recording spaces	9	11%	21	17%	46	20%
Affordability of venues, rehearsal, and/or recording spaces	1	1%	9	7%	20	9%
Sufficient funding for music businesses	7	9%	7	6%	13	6%
Sufficient funding for artists/musicians/non-profits	12	15%	10	8%	28	12%
Earning enough within the music industry to make ends meet	8	10%	8	6%	49	21%
Having access to managers and other resources needed	7	9%	3	2%	15	7%
Leadership and/or mentorship in your community	20	25%	15	12%	34	15%
Attention/promotion of your musical genre	16	20%	25	20%	27	12%
Availability of professional development resources specific to your area of expertise	7	9%	17	14%	13	6%
Availability of networking and/or collaborative opportunities	22	27%	32	26%	56	24%
Availability of networking and/or collaborations between the music industry and other Albertan industries	7	9%	13	10%	24	10%
Transit options within your town or city	13	16%	21	17%	25	11%
General support and awareness of music in my town/city	28	35%	35	28%	64	28%

TABLE 22 - LIMITATION ANALYSIS BY YEARS IN INDUSTRY

Perceived Limitation	Emerging 0-5 (n=81)		Mid-career 6-15 (n=124)		Established Career 16+ (n=229)	
Lack of venues	24	30%	41	33%	92	40%
Lack of rehearsal spaces	9	11%	16	13%	36	16%
Lack of recording spaces	7	9%	7	6%	6	3%
Lack of affordable venues, rehearsal, and/or recording spaces	23	28%	52	42%	75	33%
Lack of funding for music businesses	24	30%	43	35%	82	36%
Lack of funding for artists/musicians/non-profits	35	43%	69	56%	125	55%
Having to work outside the music industry to make ends meet	49	60%	72	58%	119	52%
Having to do it all as an artist, including marketing, management, etc.	39	48%	84	68%	127	55%
Lack of leadership and/or mentorship in your community	21	26%	33	27%	35	15%
Not enough attention/promotion of your musical genre	20	25%	28	23%	51	22%
Lack of professional development resources specific to your area of expertise	23	28%	27	22%	48	21%
Lack of networking and/or collaborative opportunities within the industry	16	20%	28	23%	41	18%
Lack of networking and/or collaborations between the music industry and other Albertan industries	10	12%	17	14%	39	17%
Lack of transit/options within your town or city	7	9%	13	10%	11	5%
General lack of awareness of music in my town/city	19	23%	29	23%	45	20%

TABLE 23 - INFORMATION SOURCES BY YEARS IN INDUSTRY

Information Source	Emerging Career 0-5 (n=81)		Mid-career 6-15 (n=124)		Established Career 16+ (n=229)	
I do not specifically research facts, statistics, or trends of the music industry	18	22%	16	13%	52	23%
Word of mouth (colleagues, co-workers, friends, etc.)	54	67%	94	76%	166	72%
Media (television, newspapers, online articles, podcasts, etc.)	48	59%	70	56%	102	45%
From local organization publications (i.e., Calgary Arts Development, Edmonton Arts Council, West Anthem, etc.)	21	26%	57	46%	92	40%
Government of Alberta publications	2	2%	12	10%	23	10%
Government of Canada/Statistics Canada publications	4	5%	9	7%	25	11%
Music Associations (e.g., Canadian Independent Music Association, Canadian Live Music Association, Alberta Music, Country Music Alberta, etc.)	35	43%	59	48%	107	47%
Unions (e.g., Canadian Federation of Musicians or local unions, etc.)	2	2%	13	10%	24	10%
International publications (e.g., International Federation of the Phonographic Industry IFPI, etc.)	5	6%	9	7%	25	11%

TABLE 24 - IDENTITY CHALLENGES BY YEARS IN INDUSTRY

Identity Challenges	Emerging Career 0-5 (n=81)		Mid-career 6-15 (n=124)		Established Career 16+ (n=229)	
No, I do not think I have been unable to thrive based on one of those factors.	39	48%	72	58%	144	63%
Prefer not to say	1	1%	5	4%	11	5%
Unsure	9	11%	13	10%	20	9%
Yes, I feel like I have been unable to thrive in the music industry based on one of those factors in the last 12 months.	32	40%	34	27%	54	24%

TABLE 25 - STRENGTH ANALYSIS BY EQUITY GROUP

Perceived Strength	Equity-Denied (n=272)		Historically Privileged (n=173)	
Availability of venues	63	23%	45	26%
Availability of rehearsal spaces	29	11%	15	9%
Availability of recording spaces	40	15%	38	22%
Affordability of venues, rehearsal, and/or recording spaces	20	7%	11	6%
Sufficient funding for music businesses	16	6%	11	6%
Sufficient funding for artists/musicians/non-profits	37	14%	14	8%
Earning enough within the music industry to make ends meet	48	18%	19	11%
Having access to managers and other resources needed	20	7%	7	4%
Leadership and/or mentorship in your community	58	21%	11	6%
Attention/promotion of your musical genre	49	18%	20	12%
Availability of professional development resources specific to your area of expertise	29	11%	8	5%
Availability of networking and/or collaborative opportunities	69	25%	43	25%
Availability of networking and/or collaborations between the music industry and other Albertan industries	27	10%	17	10%
Transit options within your town or city	40	15%	23	13%
General support and awareness of music in my town/city	81	30%	50	29%

TABLE 26 - LIMITATION ANALYSIS BY EQUITY GROUP

Perceived Limitation	Equity-Denied (n=272)		Historically Privileged (n=173)	
Lack of venues	84	31%	80	46%
Lack of rehearsal spaces	40	15%	22	13%
Lack of recording spaces	15	6%	7	4%
Lack of affordable venues, rehearsal, and/or recording spaces	103	38%	49	28%
Lack of funding for music businesses	94	35%	58	34%
Lack of funding for artists/musicians/non-profits	150	55%	82	47%
Having to work outside the music industry to make ends meet	153	56%	93	54%
Having to do it all as an artist, including marketing, management, etc.	163	60%	89	51%
Lack of leadership and/or mentorship in your community	57	21%	36	21%
Not enough attention/promotion of your musical genre	64	24%	36	21%
Lack of professional development resources specific to your area of expertise	65	24%	36	21%
Lack of networking and/or collaborative opportunities within the industry	59	22%	27	16%
Lack of networking and/or collaborations between the music industry and other Albertan industries	46	17%	21	12%
Lack of transit/options within your town or city	22	8%	10	6%
General lack of awareness of music in my town/city	54	20%	42	24%

TABLE 27 - INFORMATION SOURCES BY EQUITY GROUP

Information Source	Equity-Denied (n=272)		Historically Privileged (n=173)	
I do not specifically research facts, statistics, or trends of the music industry	50	18%	40	23%
Word of mouth (colleagues, co-workers, friends, etc.)	198	73%	121	70%
Media (television, newspapers, online articles, podcasts, etc.)	140	51%	85	49%
From local organization publications (i.e., Calgary Arts Development, Edmonton Arts Council, West Anthem, etc.)	113	42%	59	34%
Government of Alberta publications	29	11%	11	6%
Government of Canada/Statistics Canada publications	24	9%	14	8%
Music Associations (e.g., Canadian Independent Music Association, Canadian Live Music Association, Alberta Music, Country Music Alberta, etc.)	132	49%	73	42%
Unions (e.g., Canadian Federation of Musicians or local unions, etc.)	26	10%	14	8%
International publications (e.g., International Federation of the Phonographic Industry IFPI, etc.)	21	8%	19	11%

TABLE 28 - IDENTITY CHALLENGE BY EQUITY GROUP

Identity Challenges	Equity-Denied (n=272)		Historically Privileged (n=173)	
No, I do not think I have been unable to thrive based on one of those factors.	122	45%	140	81%
Prefer not to say	11	4%	6	3%
Unsure	33	12%	12	7%
Yes, I feel like I have been unable to thrive in the music industry based on one of those factors in the last 12 months.	106	39%	15	9%

Appendix F: West Anthem Music City Strategies: Rural and Small City Feedback

WEST ANTHEM
MUSIC CITY STRATEGIES

RURAL AND SMALL CITY FEEDBACK

WONDERING WHY YOU'RE HERE?

We know the music industry in Alberta is a source of meaningful community, employment, and experiences for many Albertans. We believe it can be a key economic driver, a vehicle for diversification, a force for youth retention, and a lightning rod for tourism.

West Anthem was established to help stimulate the growth and sustainability of Alberta's music industry. Currently, that work takes the form of developing a toolkit for small cities and towns and music city strategies for Edmonton and for Calgary.

Our Ask: Help us build the most meaningful toolkit for Alberta's towns and small cities by answering these questions based on your experiences and perspective. Each additional voice fleshes out our understanding of the needs, opportunities, and challenges while informing the character and shape of the toolkit.

We intend for this to take no more than 15-20 minutes, although you are welcome to spend the time you wish. If you have any questions/concerns feel free to reach out to Elyse (she/her) at elyse@birdcreatives.com

See more about this work here: westanthem.com/musiccitystrategies/

Possible risks? We see participating as very low-risk. We'll only share responses collectively or anonymously (we'd remove any identifying information). We do want to track participants to ensure we're reaching a number of representatives in various jurisdictions, but only Bird Creatives and our clients will have access to the raw data. If you have any concerns, please reach out! We're willing to work to make this a comfortable process for you.

Introduction (so we know who we're hearing from and don't send you reminders after you're done!)

1. Please introduce yourself by sharing

- Your name/pronouns:
- Your email address:
- Where you're based (town/city):
- Your organization/business and your role:

The State of Music Where You Are

2. How would you rate the state of music in your town/city?
(fill in the bubble that most closely corresponds to your experience and perception)

- ◉ Pretty much nothing.
- ○ We've got a few "music" things, but not well known or popular.
- ○ I have no idea.
- ○ We've got a lively music scene that some folks are aware of.
- ○ Music is our jam! It contributes socially and economically.

3. Answer the next question based on your response above.

If you selected "Pretty much nothing", please briefly describe the main barriers or challenges you see to music flourishing in your town/city?

If you selected any of the other bubbles, please describe any actions, policies, or bylaws your town/city has in place to support music. What has worked well? If things haven't worked well, are there any lessons learned?

3. Review the terms and descriptions below and then indicate whether you see this as part of your city or town's current music scene. (it's okay if not! we want a sense of the current situation)

In our research, we identified 8 broad areas in existing music strategies: possible priority areas to focus on for growth in music or to help raise the profile of music. Please review below.

Part of your town/city?

Music tourism

can be leveraged to draw in visitors and their tourism dollars. Music tourism includes revenue from concerts and festivals as well as merchandise, and money spent on hotels, transportation, and restaurants – not to mention the additional jobs created in hospitality.

◉ NO ○ YES

If yes, please briefly explain how this is incorporated into your town or city:

Relationships and networking

is about fostering and nurturing connections and relationships within and across industries or sectors. This includes connections to adjacent industries in the creative economy like film, marketing, the arts, software development, and other forms of entertainment, as well as to other industries such as tourism, sports, and health (e.g., expressive therapies).

○ NO ◉ YES

If yes, please briefly explain how this is incorporated into your town or city:

Regulatory and government support

includes building relationships with governments at all levels - municipal, provincial, and federal to create supportive policies that are aligned and integrated with government strategies and priorities. For example, ensuring that the interests of the music industry are represented in city/town planning and space making or that grant funding is co-developed with the music industry including eligibility criteria and outcomes that make sense to the industry.

○ NO ○ YES

If yes, please briefly explain how this is incorporated into your town or city:

People

is meant to highlight the need to ensure that ALL people in the music industry have the opportunity to participate, including access and opportunities for equity-deserving groups, as well as ensuring livability and affordability for artists and industry folks.

○ NO ○ YES

If yes, please briefly explain how this is incorporated into your town or city:

Part of your town/city?

Spaces and places

are quality venues and rehearsal spaces that can meet different needs for performers and musical genres (performing, rehearsing, recording and educating). Also included are outdoor spaces, both purpose built and parks, as well as community spaces or multi-purpose spaces where music is performed or practiced.

NO

YES

If yes, please briefly explain how this is incorporated into your town or city:

Professional development

is meant to highlight the opportunities for people in the music industry to grow and learn, both in their craft and in the business of music. This includes music education (broadly speaking), business specific activities, helping people be aware of opportunities in the industry, and support for entrepreneurs and artists.

NO

YES

If yes, please briefly explain how this is incorporated into your town or city:

Social benefit

refers to the idea that music, the universal language of the human experience, connects us, heals us, and defines us. It adds to the social fabric and livability of communities and improves the overall quality of life for audiences.

NO

YES

If yes, please briefly explain how this is incorporated into your town or city:

Industry infrastructure

Industry Infrastructure encompasses all facets of the music industry that underpin the development, creation, marketing, selling and export of music through business activities by music companies and entrepreneurs.

NO

YES

If yes, please briefly explain how this is incorporated into your town or city:

Identifying Needs and Tools

4. We've identified a list of potential tools/information that could be helpful to growing music in towns and cities in Alberta. Please read the list on the left and then indicate in the column on the right whether you think this would be useful to your town/city with "YES" or "NO".
Once you have reviewed them all, please indicate in the final column 2-3 that you would consider most immediately valuable using an 'X'.

	Helpful to your town/city? (YES/NO)	Mark top 2-3 for immediate use (X)
Examples of small town music success stories (to pull inspiration/ideas, build a case).		☐
Orientation to what it means to be a music city and why it matters to small towns.		☐
Resources/guidance for creating a music town vision or angle or niche.		☐
Resources/guidance on assessing and understanding the current state of our town as a music city.		☐
Orientation to the kinds of roles a chamber of commerce/town council can play.		☐
Examples of policies, bylaws, or zoning for music used in other small towns/cities.		☐
Attracting musical talent to your small town.		☐
Making your town a "must play" for touring musicians - why it matters and how to do it		☐
Support/guidance for hosting music festivals.		☐
Resources for growing music with an eye to justice, equity, diversity, and inclusion.		☐
The dollars and sense (pun intended!) behind music in small towns		☐

Closing

5. What is one key message about supporting music in a more rural context in Alberta that you want shared with policy makers?

6. Any local music champion you think we need to connect with? If yes, can you share their contact/business information with us so we can reach out to them?

7. Anything else you want to share? (e.g., could be anything, another possible tool we didn't suggest, a question you have, etc.)

PLEASE SUBMIT YOUR COMPLETED FORM BY ATTACHING IT TO AN EMAIL AND SENDING IT TO ELYSE at elyse@birdcreatives.com OR replying to the email by which you received the form.
Thank you SO MUCH for ensuring that perspectives from around Alberta are part of this process!

Appendix G: Individuals and Organizations reached in Engagement Three

Rural and Small City Feedback

Representative	Organization/Business/Position
Joan Ritchie	Rotary Music Festival, St. Albert
Shauna Quinn	City of Airdrie
Hugh Pettigrew	Town of Banff
Corrie DiManno	Town of Banff
Maven Boddy	City of Camrose
Jane Kaczmer	Cochrane Music Society
Mike Jones	On Stage Productions Rock the Rails Music Festival Your McMurray Magazine CMHA – Wood Buffalo
Liana Wheeldon	Arts Council Wood Buffalo
Jeannie Pernal	Grande Prairie Boys' Choir
Gerald S. Aalbers	City of Lloydminster
Lisa Kowalchuk	Medicine Hat & District Chamber of Commerce
Rob Pape	Roadworn Productions & Management Medicine Hat Folk Club
Allan Boss	Town of Okotoks
Brennan Wowk	Bo's Bar & Stage
Shelly Nichol	St. Albert and District Chamber of Commerce

*8 participants preferred to remain anonymous or did not reply to our requests to share their names. They represented a mixture of town/city council members (3), chamber of commerce leaders (3), one arts organization and one music venue. They shared perspectives from Banff, Wood Buffalo Region, Grande Prairie, Lethbridge, Red Deer, St. Albert and the Bow Valley Region.