

Central Okanagan Music Strategy

Industry Profile and Public Engagement Summary for the Central Okanagan

December 2020

Developed for

The Central Okanagan Music Strategy

Developed by

Nordicity



Acknowledgements

The **Central Okanagan Music Strategy (COMS)** will be the guiding document to advance the music industry in the Central Okanagan, including Westbank First Nation and Sylix territory, Lake Country, Kelowna, West Kelowna, and Peachland. This industry profile is an important step for the completion of the COMS.



We respectfully acknowledge the Central Okanagan is on the traditional, unceded, ancestral territories of the Syilx/Okanagan people.

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Executive Summary

A strong community is a culturally vibrant one. Music, along with the people and businesses that bring it to life, is a vital part of developing that culture. A crucial element and important contributor to what makes the Central Okanagan a great place to live or visit is its music ecosystem and the people within it. Residents of the Central Okanagan move fluidly around the region on a regular basis, meaning a regional strategy is the most effective way to support the industry. The Central Okanagan Music Strategy (COMS) is led by a group of community members whose goal is to advance the sustainability of the music industry in the Central Okanagan. With the generous support of Creative Okanagan, the City of Kelowna, FACTOR, and Creative BC, the COMS process commenced with extensive community and industry engagement to inform the industry profile contained herein. Initiated in the Fall of 2019, the COMS is scheduled for completion in December of 2021.



1121 survey responses
41 interviews
9 focus groups

Community engagement was conducted using an online survey, focus groups and interviews. An industry profile of stakeholders was developed to ensure reasonable coverage of the industry's variety and breadth. The consultation additionally enabled the exploration of themes identified in

the Kelowna 2020-2025 Cultural Plan and to gain a better understanding of the current music landscape in the Central Okanagan.

After introducing the project, the report provides an overview of the context of a rapidly evolving global music industry, the rise of municipal music planning, and the importance of music as a key part of COVID-19 urban recovery. Section 3 summarizes the Central Okanagan's music ecosystem, including the following key findings:

- The most common means for community engagement with the music industry is attending live shows (86%) and listening to music online (76%). In addition, 64% noted listening to a local radio station a few times a week or more.
- The community *strongly agreed* that they would like to attend more events in the Central Okanagan and *disagreed* that there is an adequate number of venues in the region.
- Social media (81%) and word of mouth (72%) were the most common ways to find out about music events that were most often attended as outdoor performances (78%) or at official performance venues (77%). Lack of awareness (36%) and parking (32%) were identified as key barriers to accessing music events in the region.
- Speaking to priorities, new/improved venues were noted as the top priority (58%) followed by funding for local musicians and organizations (45%).



Significant majority 'strongly agreed' they'd like to attend more music events



460 stakeholders identified in the Central Okanagan music industry

As described in Section 3.1, the industry profile identified a robust ecosystem of 460 stakeholders engaged in the industry, 60% of which were musicians. The largest cohort of industry professionals (Section 3.2.1) have been working in the industry for more than 20 years (32%) while generating

less than 20% of their annual income from music activities (63%). 32% of professionals indicated their 2020 revenue would decrease by more than half compared to 2019. Relatedly, it was noted that the most significant challenges due to the COVID-19 pandemic were a lack of consumers/audiences (78%) or opportunities to benefit from tourism (76%) due to gathering and travel restrictions.

Speaking to organizations in the industry (Section 3.1.2), most operate as music promoters (37%) or venues (26%) and have been in the industry for over 20 years (39%). Organizations rely largely on contract and volunteer workers with those under the age of 35 and identifying as female making up the largest cohorts of workers. 39% of organizations indicated earning less than \$50,000 in annual revenue in 2019, while 36% expected that figure to decrease by 50% or more in 2020. Cost of operations (92%), a lack of consumers/audiences/members (89%) and lack of adequate spaces (88%) were cited as the most significant challenges due to the COVID-19 pandemic.

Section 4 highlights key considerations from engagement, or departure points, for unpacking the various strengths, weaknesses, opportunities, and threats for the music industry in the Central Okanagan including the following findings:

- The Central Okanagan is ripe for growth within the music industry, in part because of the **attractive lifestyle** in the region.
- A unique opportunity lies in **engaging youth in music** from a young age and retaining engaged and educated citizens locally.
- There are too **few purpose-built venues** or **spaces for rehearsal and collaboration** in the Central Okanagan.
- **Audiences have an appetite for more live shows** but want inexpensive and convenient entertainment options.
- **Lack of awareness** is a key barrier experienced by stakeholders in accessing music events in the Central Okanagan.
- **Innovative and collaborative partnerships** across organizations are also key to strengthening the music ecosystem.
- The **importance of community** is a cornerstone to the Central Okanagan, kept strong by well-connected groups of creatives and longstanding, established organizations.
- There is a need for **more accessible, streamlined, and flexible funding** designed to facilitate partnerships and support artists.
- The music industry in the Central Okanagan is **largely seasonal**, with many events running from May-October but occurring sparsely in the winter months, due to lack of indoor venues.
- Music industry stakeholders recognize that **more diversity, equity, and inclusion in the music industry** is a key priority moving forward.

“Having a strong music culture is important to the health and wellbeing of our community. ”

“Music of all kinds impact a community, so a broad-based approach will enliven and inform the entire valley.”

Survey Respondents

This music industry profile provides an overview of the music industry as it relates to the Central Okanagan, based on the data obtained during the public engagement phase. The findings from this report will pave the way for developing strategies in 2021 that are evidence-based and rooted in learnings from extensive stakeholder and community engagement.

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1. Introduction

The industry profile contained herein provides an overview of Central Okanagan's music industry and analysis of the data obtained from research and engagement. It will set the stage for an evidence-based and context-driven Music Strategy for the region to be completed by December 2021.

Completed in 2019, the City of Kelowna's 2020-2025 Cultural Plan sets a course for Kelowna's creative sector to provide accessible, diverse and inclusive experiences. In addition, the plan is innovative, forward-looking and encourages effective use of resources and the value of partnerships and cooperation. It identified 5 key themes: Spaces, Vitality, Capacity, Connections and Strategic Investments. Given that music is a key component of the creative sector, a group of community members came together to explore these themes as they relate to music and formed the Central Okanagan Music Strategy (COMS) [Leadership Ensemble and Advisory Group](#).

The Central Okanagan area includes Westbank First Nation and Sylix territory, Lake Country, Kelowna, West Kelowna, and Peachland. Given the fluid nature of Central Okanagan residents, who move around the region on a regular basis, a strategy for the region seemed natural. In addition, these municipalities are embarking on their own municipal planning, providing an opportunity to integrate regional music planning. With an estimated current population of 195,000, the area is known for its stunning scenery, four distinct seasons including a mild winter climate and is a hub for music.

The COMS is being led by Creative Okanagan with generous support from the City of Kelowna, Creative BC and FACTOR. The purpose of the Music Strategy is to advance the sustainability of the music industry in the Central Okanagan through:

- Connecting people with similar interests, towards collective action;
- Developing community support toward music;
- Increasing support to live music;
- Creating an understanding of the current music landscape; and,
- Setting priorities for the future development of music in the Central Okanagan.

To ensure the success of the COMS, it is critical to hear from and represent a wide range of voices within the industry to inform strategic planning. This includes groups that both directly and indirectly impact the music industry in Central Okanagan - the private sector and artists alike - to create a connected and engaged music community. The timing is right for a variety of stakeholders to come together to define, design, and implement a vision for Central Okanagan as a music industry hub. The findings contained herein aim to inform the design of a strategy and provide a strong foundation on which to build a strategy for the future of music.

1.1 Approach

With the above background in mind, Nordicity was engaged to lead the research contained herein. To do so, the research included the following phases:

- A research design phase, that included secondary research to inform the study and a kickoff session with the COMS Advisory Group to establish objectives for the research;
- Extensive stakeholder engagement, including more than 40 interviews, 9 focus groups and 1,121 responses to the online survey (described further in Appendix A); and,
- Analysis of all research streams to uncover key themes from the primary research, described Sections 3 and 4.

Strategic planning initiatives to be done 2021, including a Music Summit and other opportunities for validation as well as forward-looking planning and implementation.

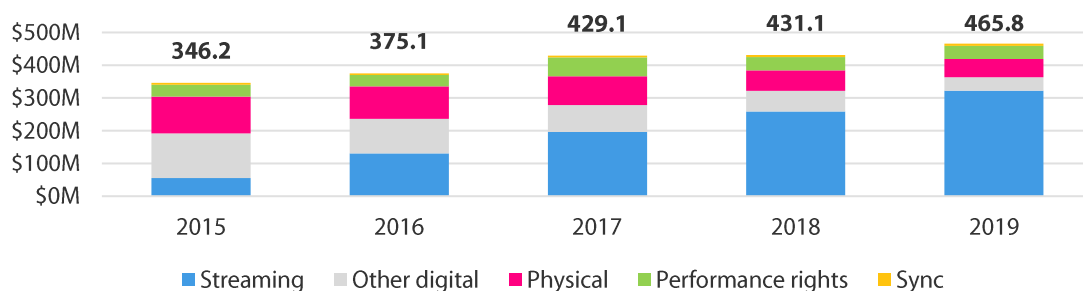
2. The Context

The sections below provide a summary of key contextual factors influencing the music industry, based on secondary research and assessment of key trends. It highlights key global and national shifts in the music industry as well as the rise of music as a key pillar for municipal planning. In the context of the COMS, the findings below are especially important when considering ways to support local artists or developing audiences to support the local music industry. Importantly, while the impact of COVID-19 cannot be ignored, many of these trends existed before COVID-19 and will continue to exist after.

2.1 An Evolving Music Industry

Recorded music revenue has been growing since reaching a record low in 2014, driven largely by **streaming revenue, which accounted for 56% of the total revenue in 2019** (compared to only 13% in 2014).¹ As shown below in Figure 1, a similar trend is occurring in Canada with **streaming revenue making up 69% of the 2019 Canadian total**.

Figure 1. Recorded Music Trade Value, Canada (US \$M)



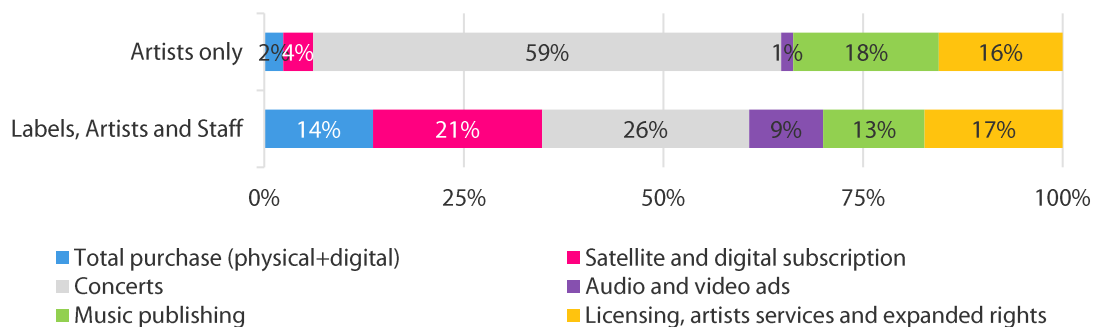
Source: IFPI, *Global Music Report 2019*

Live music has become a critically important segment within the total global music industry revenue over the past 20 years, growing from 33% of revenue in 2000 to 43% in 2016.² With respect to artists, music accounted for **59% of their revenues**, as visualized in Figure 2.

¹ IFPI (2020), *Global Music Report 2019*

² <https://musicindustryblog.wordpress.com/2017/06/15/do-not-assume-we-have-arrived-at-our-destination/>

Figure 2. Breakdown of revenue sources for labels, artists, and support staff in the US, 2017



Source: Citi GPS (2018), *Putting the band back together: remastering the world of music*

While streaming revenue has helped to make-up for decreasing sales in other recorded music streams, these revenues have been largely captured by larger music labels.³ The fact that streaming accounts for such a low portion of artists' and labels' revenue hints at the complexity of the digital music industry. For example, there are an increasing number of intermediaries and low-cost access to music through platforms such as YouTube and Spotify. In addition, there is a global discoverability challenge and increasing power of major record labels and streaming services. This dynamic reinforces the **"gatekeeper culture"** for musicians through which curators can have **more influence over revenues than loyal audiences** by programming an artist on popular playlists.⁴

The Value Gap / Transfer of Value

The value gap describes the growing mismatch between the value that some digital platforms, in particular online user upload services, such as YouTube, extract from music and the revenue returned to the music community – those who are creating and investing in music. For music to thrive in a digital world, those that are creating and investing in music must be able to negotiate fairly.

IPFI, Fixing the Value Gap, Global Music Report 2018

Taken together, there is only a **narrow opportunity to generate revenue through streaming** for smaller/local artists, further illustrating the importance and reliance on live music. Given the performance restrictions during 2020, many **artists have lost their most important revenue stream**. Moreover, the findings presented in Sections 3 and 4 show that the vast majority of **musicians in Central Okanagan only generate a small portion of their income through music activities** and thus rely on other income streams as well as private or public financial support.

Another important factor is the global conversation about **lack of equity, diversity, and inclusion** in the music community in the past years. While the industry celebrates the growing awareness around Indigenous, Black, and People of Colour (IBPoC) and female artists, most in the industry also

³ Aa 2017 study by the Finnish Music Publishers Association concluded that the top 0.4% of artists on Spotify garner 10% of the revenue redistributed by the platform.

⁴ A 2019 survey of 300 US industry professionals conducted by The Creative Independent indicated that 35% of industry professionals and 27% of musicians feel that one of their greatest challenges in pursuing a rewarding career in the music industry was the persistent "nepotism and unfair gatekeeper culture. Source: The Creative Independent (2019) [Music Industry Investigation Report](#)

acknowledge that there is still a long way to go, specifically when it comes to the representation of women in the charts. According to recent research, **only one in five top 100 songs are female artists.**⁵ In addition, challenges related to **Indigenous artists across the country are exacerbated by the intrinsic barriers** inherent to indigeneity that negatively impacting their ability to thrive due to lack of support.⁶

While the above provides only a high-level view of key trends that impact the music industry, it is important to note they relate directly to the evolving reality of those operating in Central Okanagan's music industry. For example, many stakeholders noted the **need for funding support** as they continue to be 'squeezed' by the value gap and the growing importance of live music revenue. Addressing industry-wide challenges as well as local ones, such as **lack of purpose-built and accessible space** are important themes for the growth of the music industry in the region. In addition, the gatekeeper culture and **rising diversity gap** are important trends to recognize as the Central Okanagan continues to grow, attracting **new and diverse residents to the region.**

2.2 The Rise of Municipal Music Planning

Today, there is growing recognition among municipal governments and stakeholders that music has the potential to deliver significant economic, employment, cultural and social benefits.⁷ While often championed by local government these approaches now often **encompass more than one city** as is the case with recent approaches in Alberta⁸ and coordinated work being done by Greater Toronto and Hamilton. The importance of partnerships and regional collaboration was also widely noted by stakeholders, described further in Section 4.6.

Culture has a major impact on community unity, wellness, and individual's mental health. More specifically, music plays a part in every community, to varying degrees, but is most valued for creating shared experiences and showcasing what cities have to offer. A strong music economy drives value for cities through **economic growth and development**, a strengthened tourism sector, job creation across industries and a city brand building that fosters and **facilitates artistic growth.** A resilient and vibrant music community can also attract other investment, along with **young, diverse, talented professionals seeking a certain quality of life,**⁹ regardless of what sector they work in. While historically championed by larger metropolitan cities, music is increasingly seen as a means for smaller cities to help develop a vibrant and attractive city (e.g., Hamilton, Huntsville, AL).¹⁰

There are some essential elements that make up a robust music economy. Members of the community are all potential audience members, driving the industry - **without an audience, there is no music industry.** Artists and **musicians are the cornerstone**, including singers, songwriters and producers that generate the creativity. **Ample access to spaces and places** combined with the

⁵ Dr. Stacy L. Smith, Dr. Katherine Pieper, Hannah Clark, Ariana Case & Marc Choueiti (2020). *Inclusion in the Recording Studio? Gender and Race/Ethnicity of Artists, Songwriters & Producers across 800 Popular Songs from 2012-2019*

⁶ <https://www.aptnnews.ca/wp-content/uploads/2019/11/Music-Impact-Study.pdf>

⁷ <http://musiccanada.com/wp-content/uploads/2015/06/The-Mastering-of-a-Music-City.pdf>

⁸ <https://www.westanthem.com/wp-content/uploads/2020/10/West-Anthem-Music-Ecosystem-Study-Executive-Summary-October-2020.pdf>

⁹ <https://www.toronto.ca/legdocs/mmis/2016/ed/bgrd/backgroundfile-90615.pdf>

¹⁰ <https://communitybuilders.org/insights/when-small-towns-take-the-main-stage-5-tips-on-turning-your-city-into-a-vibrant-music-hub/>

presence of musicians and a receptive and engaged audience leads to a **thriving music scene and a vibrant community**. Music-related businesses are a key foundation to a strong music industry, acting as the infrastructure around the artists to develop a self-sustaining music centre to write, produce, record, promote and perform in.

Robust music economies exist when supported by multiple levels of government, which provide the right environment for music to thrive. Efforts for developing music industries are wide ranging including the development of music programs in public elementary and middle schools and greater access to extracurricular music programs in partnership with afterschool care programs. At a government-level, they can include **music-friendly and musician-friendly** policies, as well as a **music office or officer** to maintain and enact those policies. A music advisory board that acts as a voice for industry stakeholders, as well as engaging with **the broader music community**, enables more **buy-in support**. Ensuring adequate **access to spaces and places**, from outdoor festival grounds to jam spaces for artists and all-ages events for audiences, helps ensure audience development. Leaning into the potential for music tourism, enables stakeholders from different sectors to work closely with artists and promoters.

There is immense opportunity to make the **Central Okanagan a vibrant music hub**, given the local community's desire for greater variety in music and all of the factors that make the Central Okanagan attractive to newcomers (e.g., cost of living compared to larger cities, quality of life, proximity to natural beauty and seasonal sports/activities). A blossoming music scene in Central Okanagan and a distinct identity separate from that of larger cities such as Vancouver and Calgary make the region an attractive place for musicians and audiences alike.

2.2.1 Music and COVID-19 Urban Recovery

While the whole music industry is being disrupted, live music has been significantly impacted due to COVID-related closures and restrictions. In addition, when people are unable to gather in person, the business is unable to earn revenue in the ways it might have done before. Given the reliance on live music revenues, the impact of these closures has had ripple effects throughout the wider music industry. At the same time, COVID-19 has also revealed the precariousness of work across the creative industries.¹¹

While the negative impacts are immense, many have also pointed to the opportunity that music has to be at the core of urban recovery following the pandemic. For example, the Canadian Urban Institute (CUI) prepared a Pandemic Recovery Toolkit to “help residents, community groups, BIAs, and [cities] revive main streets and core spaces.” It notes that **music is crucial to the vitality of a city’s core public spaces** – and the CUI reflects this reality as it includes Live Music as a core near-term element of its toolkit. By “bringing the main street to life” music may encourage people to return to restaurants and coffee shops.¹² The **CUI also notes the importance of including local musicians from an array of cultures, both to foster inclusion and to broaden the appeal of the musical offerings**.

Jurisdictions are also taking notice of COVID-19’s impact on the music industry and are implementing ways to support the recovery of the industry. For example, as part of the City of Vancouver’s Cultural

¹¹

<https://www.tandfonline.com/eprint/HRX2MZCD3MIVBYMF7T4A/full?target=10.1080%2F09548963.2020.1770577&>

¹² <https://bringbackmainstreet.ca/>

Recovery, they have renewed the Vancouver Music Fund with a \$300,000 investment.¹³ The City of Toronto has focused its efforts on understanding the impact of music venues and providing support for the recovery of live music. In London, the Music Venue Trust is leveraging donations to support grassroots venues. More examples of COVID-19 music industry recovery efforts can be found in Appendix B.

With the above benefits, elements, and strategies for developing the music industry and its potential role in COVID-19 recovery in mind, it is evident that this will also be an opportunity **for the Central Okanagan to advance sustainability of the music industry**. More specifically, with the COMS launching at the end of 2021, the plan is well positioned to support the recovery of the music industry, ensuring a sustainable and thriving regional music scene in the ‘new normal.’

3. Central Okanagan’s Music Ecosystem

The key input for the industry profile was an ‘opt-in’ online survey that received more than **1,100 responses** between July 16 and Sept 26, 2020.¹⁴ Along with a sizable cohort of engaged local residents, responses included more than **40 organizations** and **330 music professionals**.

Speaking to geography, over **90% of respondents lived within the Central Okanagan**, with respondents from outside the region mostly from Vancouver or other cities in the Okanagan. While the survey was not intended to be a statistically representative sample of each community, it received responses from each of the four communities in Central Okanagan. The response rates in West Kelowna and Kelowna were largely proportional to their size of regional population, while Peachland’s representation was notably higher, and Lake Country lower. In addition to survey responses, leaders from each of the municipalities were engaged directly through interviews and focus group discussions (Appendix A).

Table 1: Response rate by Census Municipality

Municipality	Survey Responses	% of total responses	Population ¹⁵	% of total population	Response/population ratio
Kelowna	703	77%	133,579	72%	1.06
Lake Country	38	4%	12,922	7%	0.59
Peachland	39	4%	5,428	3%	1.45
West Kelowna	133	15%	32,655	18%	0.82
TOTAL	913	100%	184,584	100%	

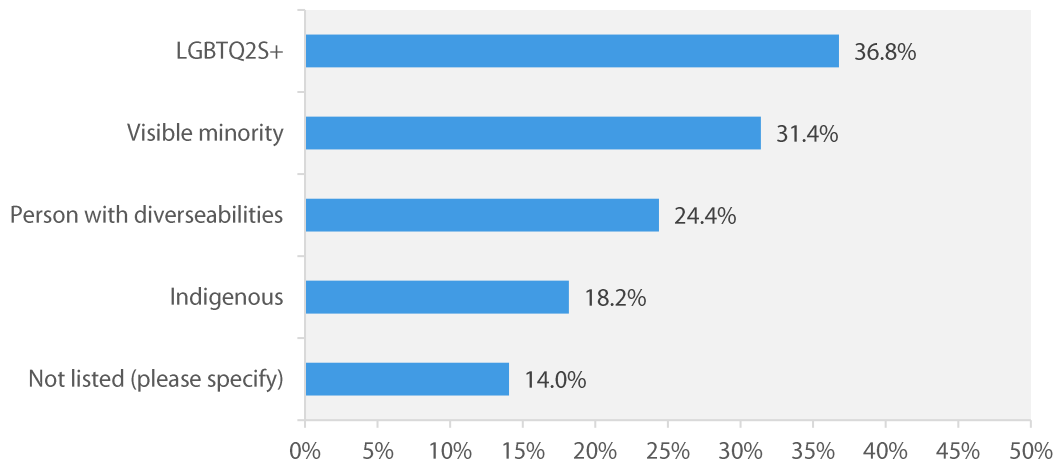
In terms of demographics, respondents were **58% female**, while **30% identified as a diverse stakeholder group**. Of those who self-identified with a listed group, the highest number of respondents identified as LGBTQS+ (37%) and visible minority (32%).

¹³ <https://vancouver.ca/news-calendar/cultural-recovery-grants-provide-a-boost-to-arts-and-culture-communities.aspx>

¹⁴ All data presented in Section 3 is drawn directly from the online survey, unless otherwise noted.

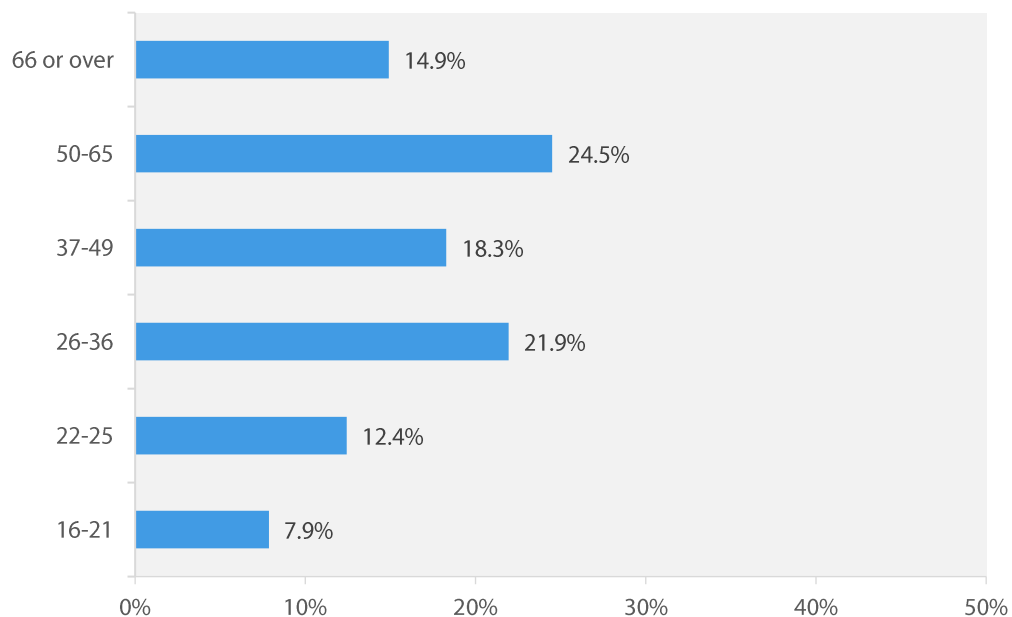
¹⁵ Based on 2016 Statistics Canada data.

Figure 3: Do you self-identify with any of the groups listed below? (n=242)



As seen below, a wide range of age groups responded to the survey, with nearly a quarter of respondents between 50 and 65 as well as significant representation from a cohort of young adults between 16-36 (42%).

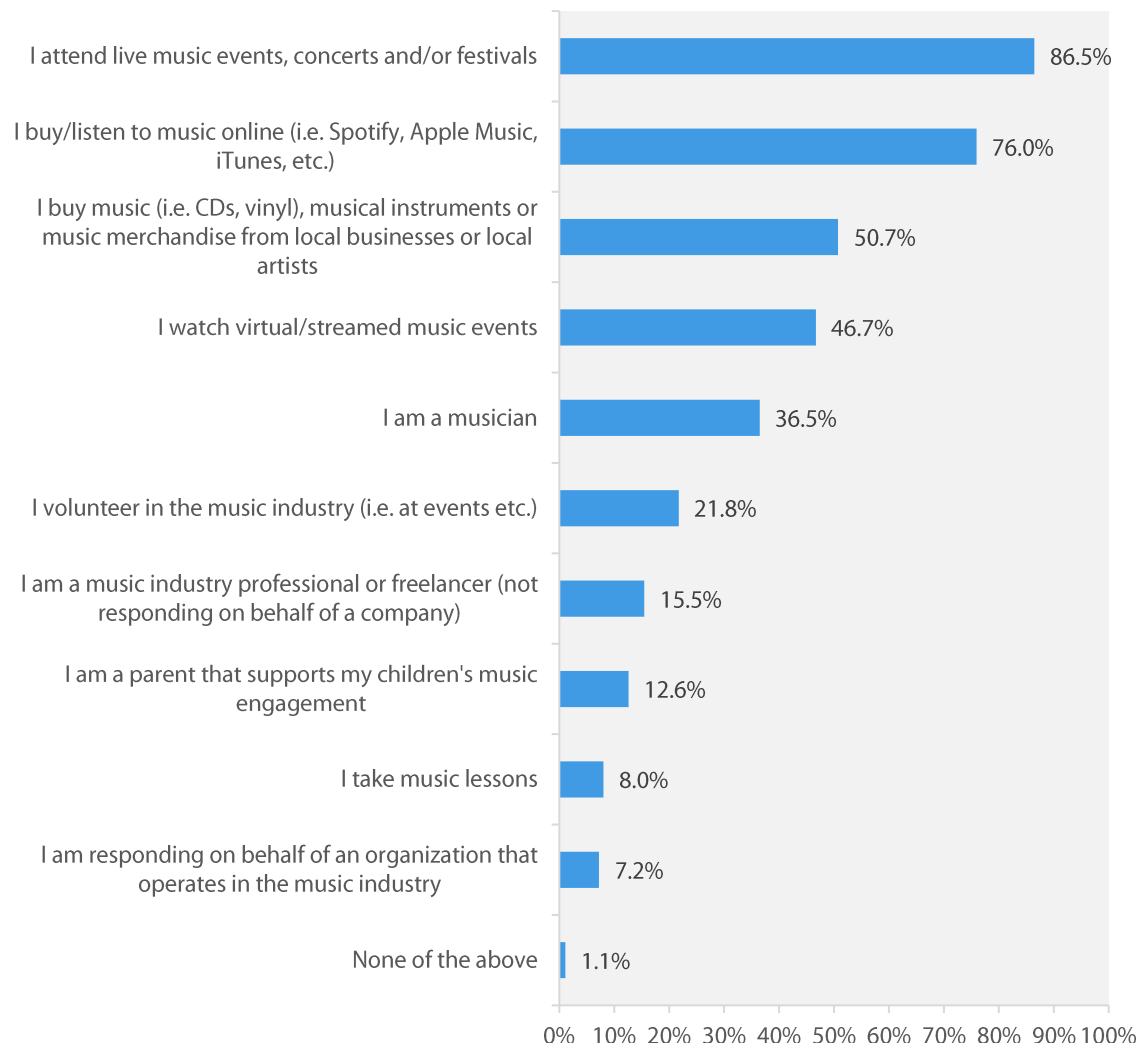
Figure 4: Age of Respondents (n=1094)



3.1 Community Music Engagement

The survey received uptake from interested community members in the Central Okanagan who reported their current engagement with the industry as well key barriers and potential priorities for the COMS. As visualized below, stakeholders reported engaging the music scene through **attending live events (86%)** and **listening to to/buying music online (76%)**. Importantly, there is also a significant number of respondents (51%) who indicated they buy music from local businesses or artists

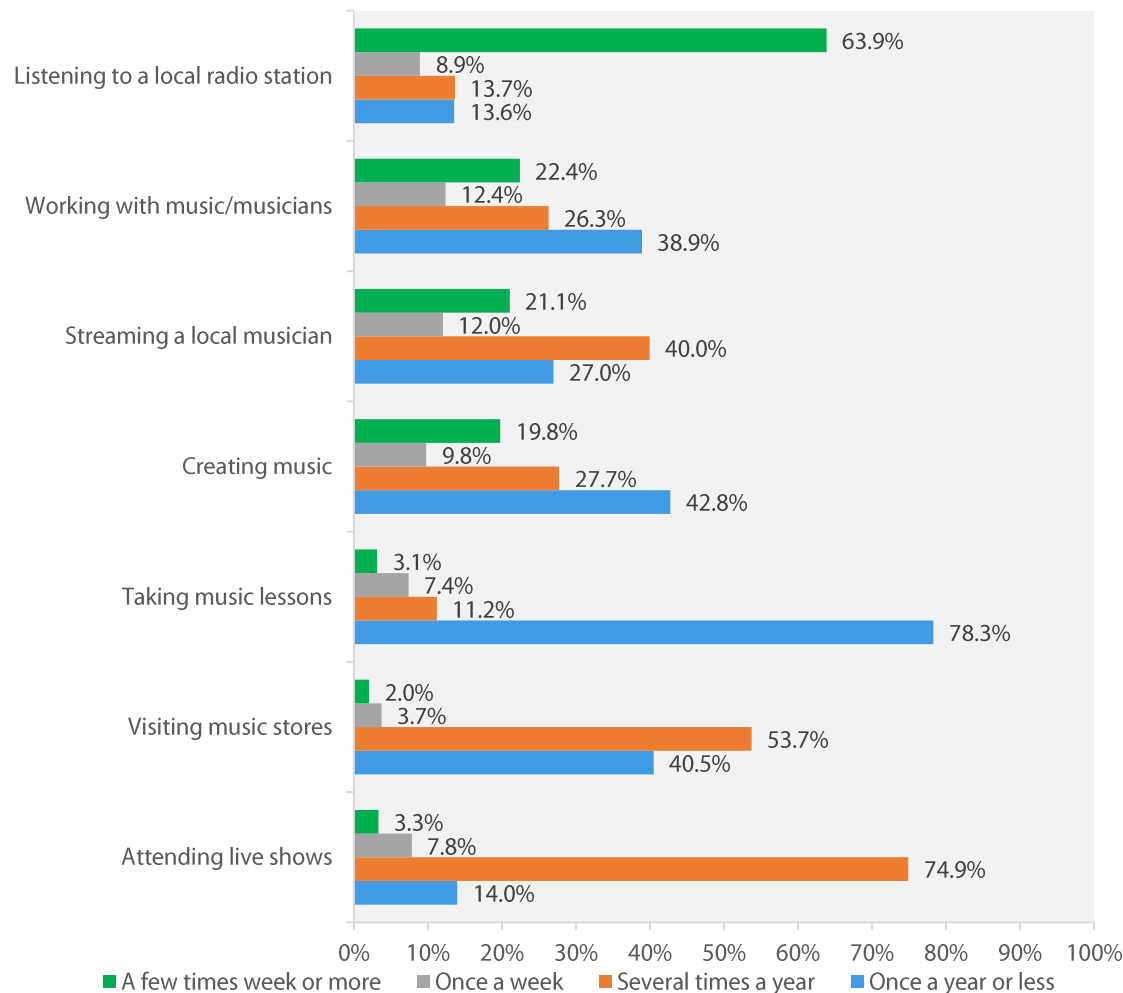
Figure 5: How do you engage in the Central Okanagan's Music Scene? (n=1094)



When asked about frequency of involvement with activities in the music scene, 64% reported listening to a *local* radio station a few times a week or more. In addition, 65% of respondents attend several live shows annually (4-12 times/year).

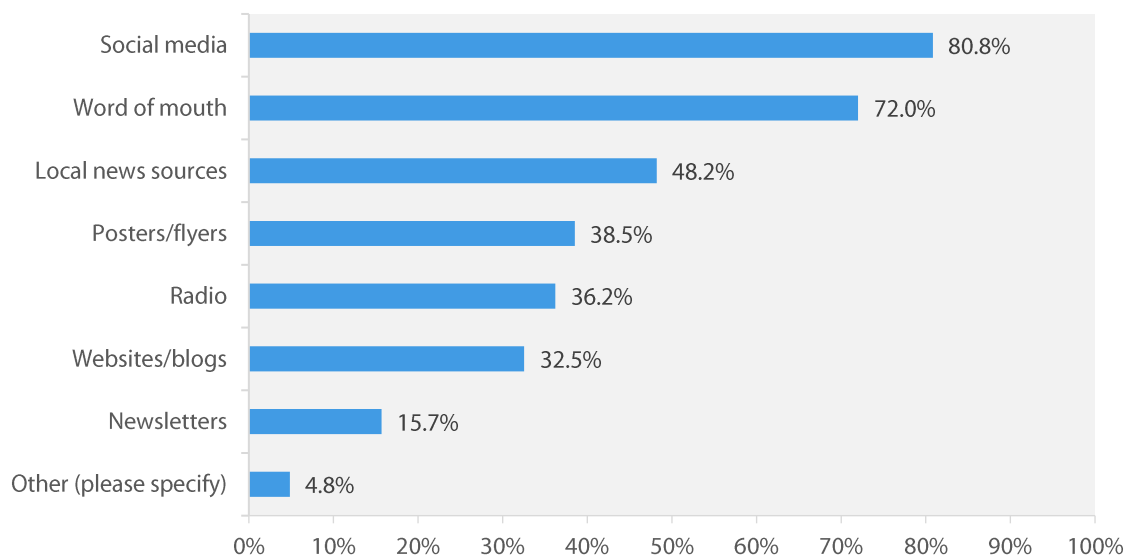
Results from Figures 5 and 6 both illustrate the **diversity of engagement with music, a keen desire for live music events, concerts and festivals, and a loyalty to locally run businesses** such as radio stations. These themes are echoed in qualitative findings in Section 4.

Figure 6: On average, how often in the last year have you been actively involved with activities in the Central Okanagan's music scene? (n=953)



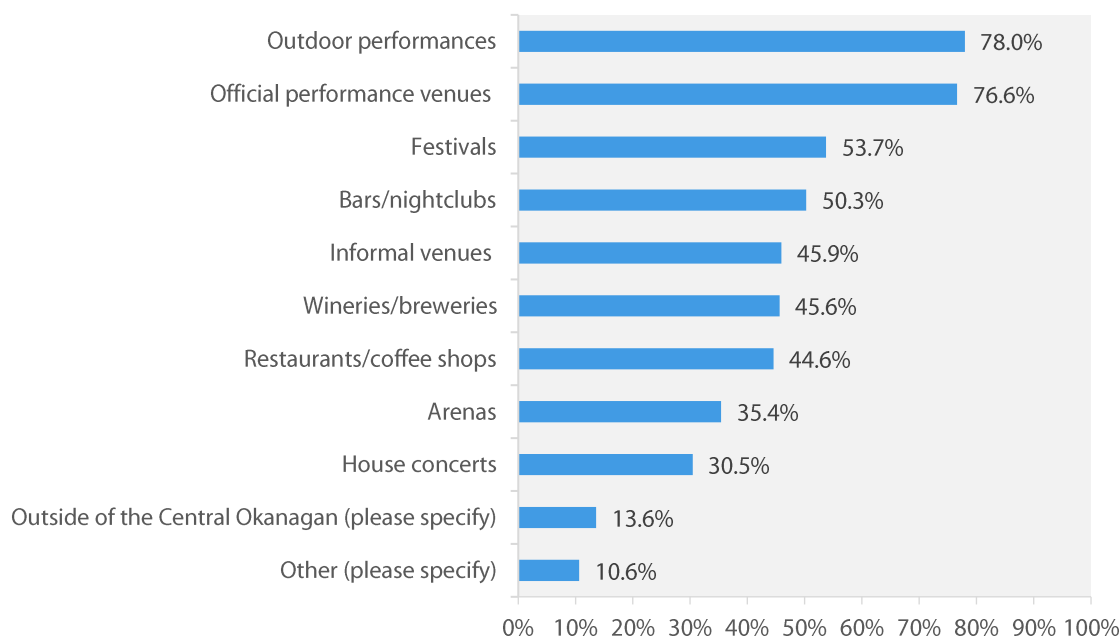
While awareness is discussed further in Section 4.5, respondents indicated that social media (81%) and word of mouth (72%) were the most common ways to find out about music events. This highlights the **changing trends in reaching audiences**, partly due to demographic shifts and shifting consumer preferences given technological advancements.

Figure 7: How do you typically find out about music events in the Central Okanagan? (n=950)



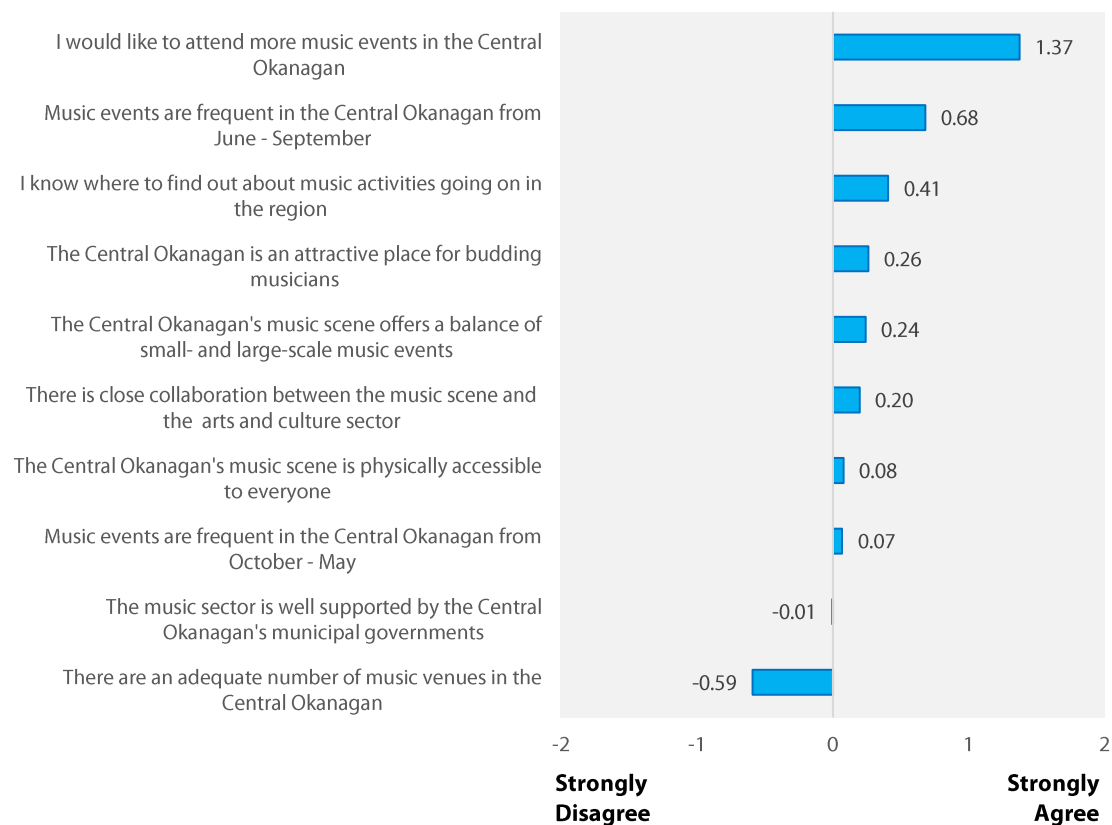
As visualized below, **outdoor performances (78%)** and **performance venues (77%)** were the most common while many people also attend music in festivals, bars/nightclubs, wineries/breweries and restaurants/coffee shops. 'Others' including the farmers market, the Kelowna Yacht Club and other informal, surprise, often unadvertised music performances.

Figure 8: Where do you typically attend music events/activities in the Central Okanagan? (n=949)



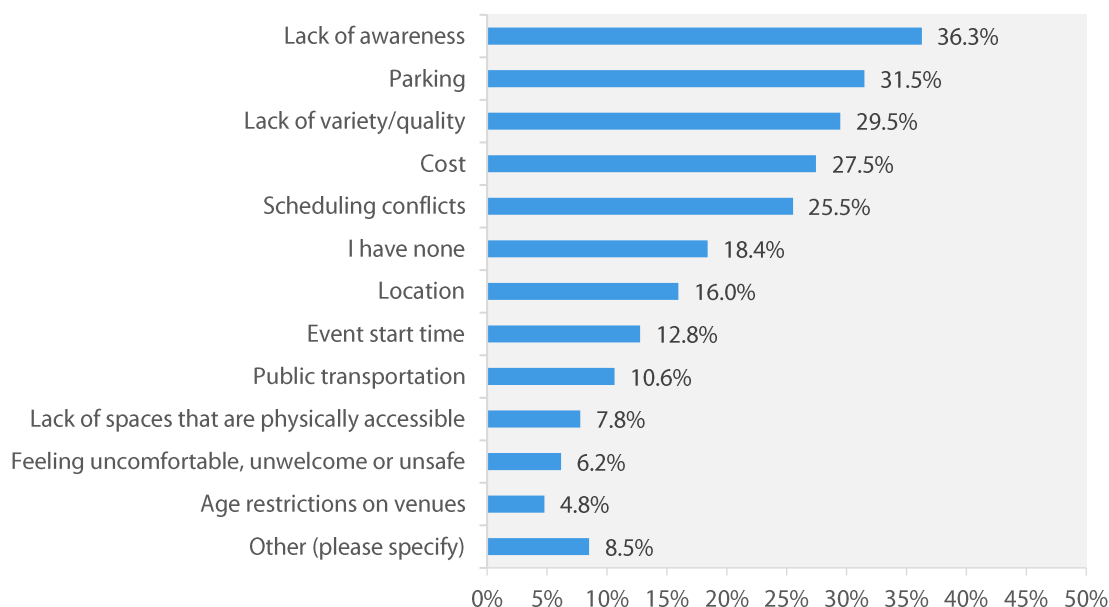
As seen below, there is an **appetite to attend more events** in the Central Okanagan, which echoes the sentiment highlighted in Section 4.9 that there are too few events year-round, with a gap market from October to May. Relatedly, a majority **disagreed that there were an adequate number of venues in the region.**

Figure 9: Please rank your level of agreement with the following statements: (n=950)



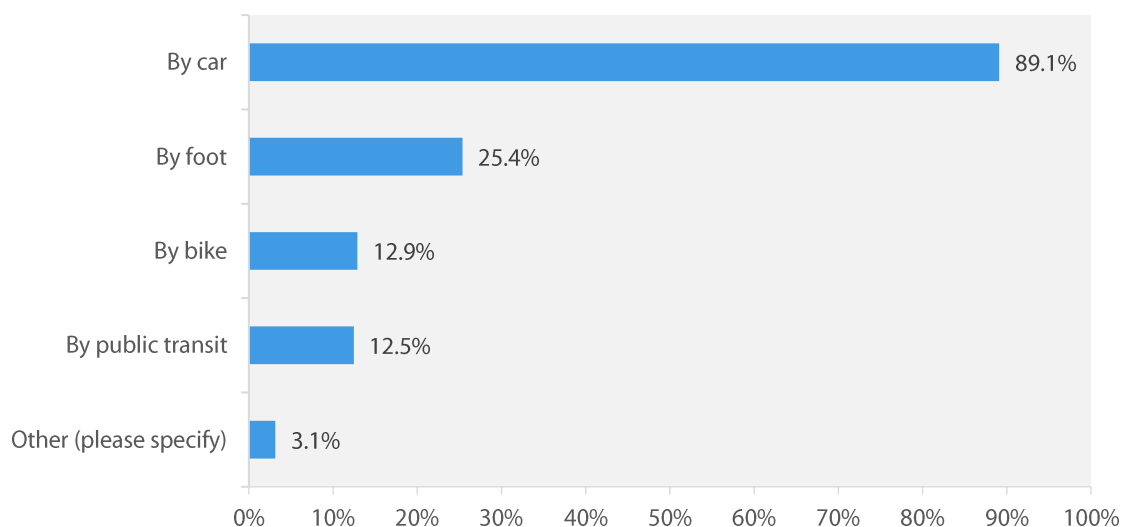
To explore potential barriers to attending events, the survey also queried key challenges for accessing events. As visualized below, the most common challenge is **awareness (36%) and parking (31%)** while a lack of variety and quality (29%) was also noted as a significant barrier.

Figure 10: What challenges or barriers have you experienced in accessing music events in the Central Okanagan? (n=940)



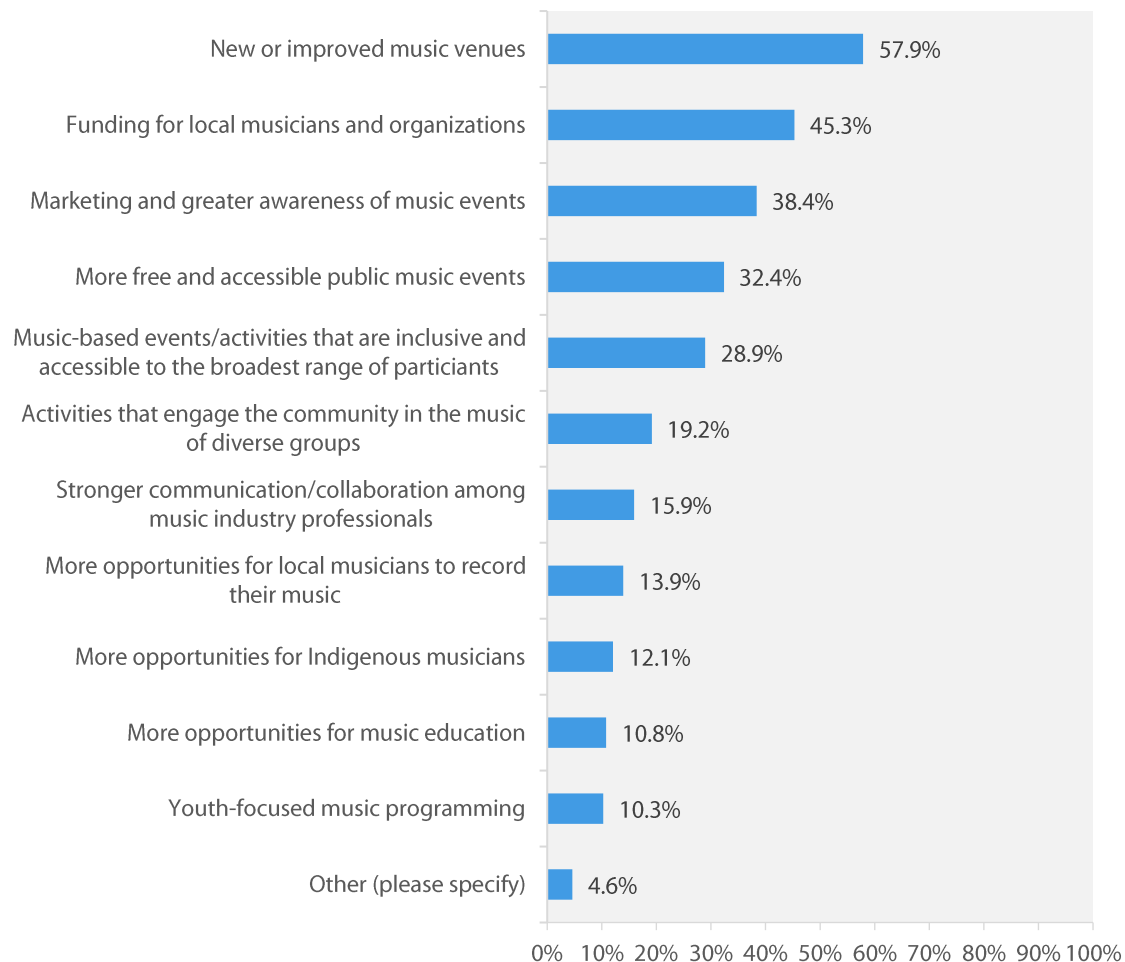
Relating to the finding that parking can prove a significant challenge, a significant majority (**89%**) **indicated accessing music entertainment by car**. More on challenges arising from a reliance on personal vehicles is outlined throughout Section 4.

Figure 11: By which means of transportation do you typically access musical entertainment, if outside of your home? (n=954)



With the above challenges in mind, community members and industry stakeholders also identified what they believed should be prioritized, which included new or improved **venues** (see Section 4.3), **funding for local musicians** (see Section 4.8) and greater **awareness** (see Section 4.5).

Figure 12: What do you think should be prioritized when developing the music scene/sector in the Central Okanagan? (n=954)

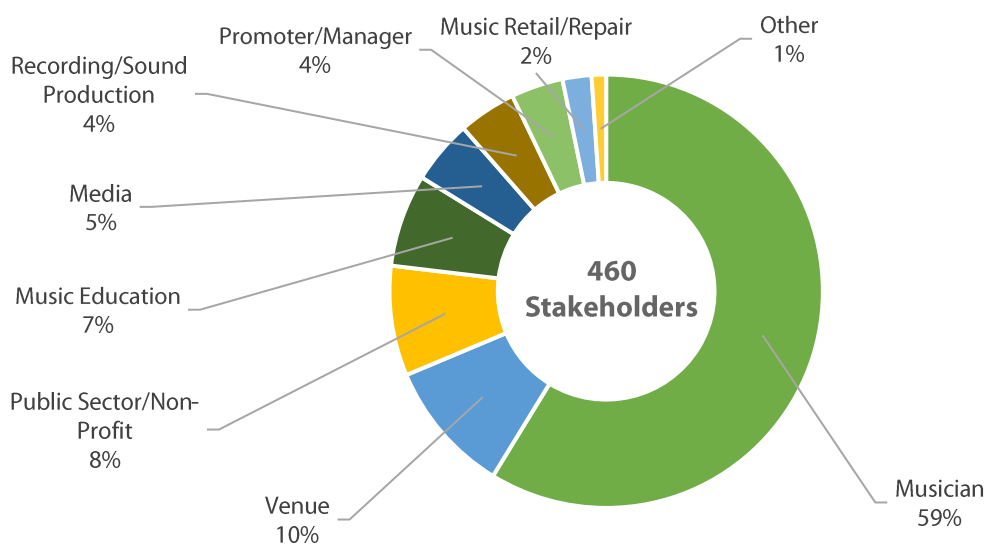


3.2 Industry Profile

In addition to an engaged community, the Central Okanagan is home to a robust group of musicians and industry professionals. By combining the work completed by the COMS Leadership Ensemble and the Advisory Group with those who self-identified as musicians and organizations in the online survey, **460 stakeholders** engaged in Central Okanagan's music industry were identified. As illustrated below, nearly 60% identified as musicians in their primary role while a sizable number of venues and public sector/non-profit stakeholders were identified.

This industry composition was largely echoed in stakeholder interviews where many noted an industry with a **strong foundation of talented and passionate artists, various high-quality music education programs, and a robust non-profit support ecosystem**. However, it was also noted that there is **not always enough professional support** to sustain the industry, especially relating to a lack of experience promoters and sound/light technicians.

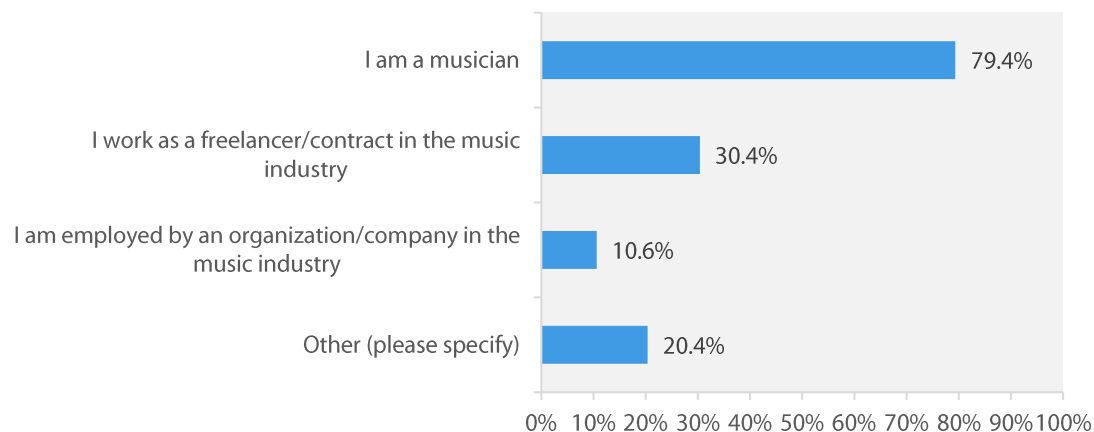
Figure 13: Central Okanagan Industry Composition (n=460)



3.2.1 Musicians and Industry Professionals

The significant majority (nearly four in five) of music industry professionals in the survey **indicated musician as their main role**. There was also a large cohort of freelancers working in the industry while the most common 'other' profession was amateur artist.

Figure 14: As an individual, what is your main role in the Central Okanagan's music industry? (n=339)



Speaking to training, the significant **majority** reported they had **some form of training** (87%, Figure 15), most commonly through private lessons (59%, Figure 16 on the following page).

Figure 15: Have you taken any music education or training? (n=324)

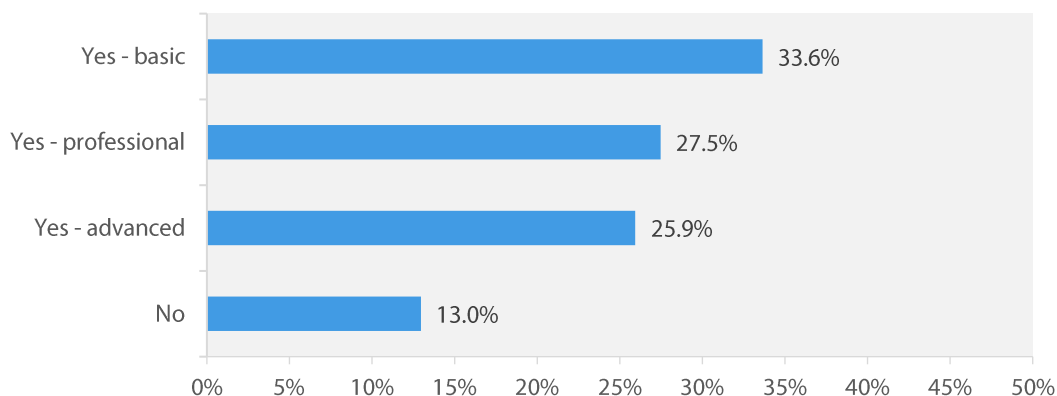
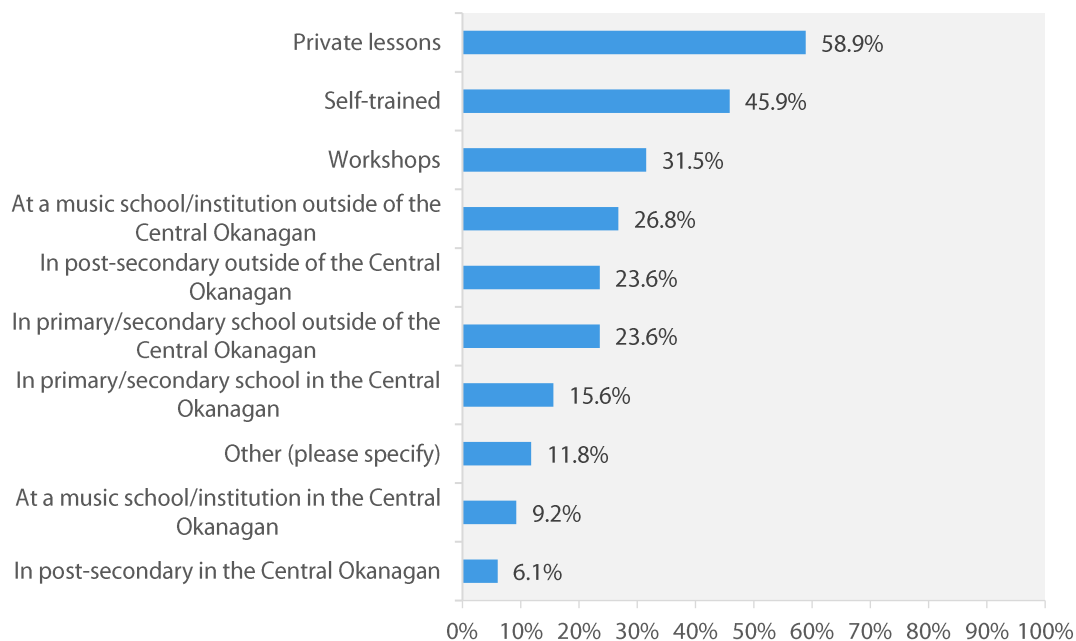
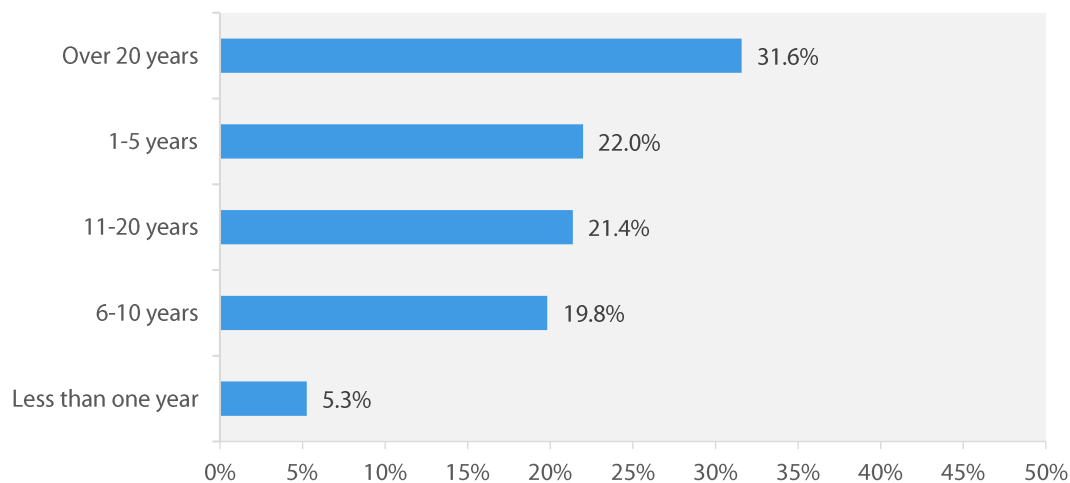


Figure 16: Where did you receive your education/training? (n=314)



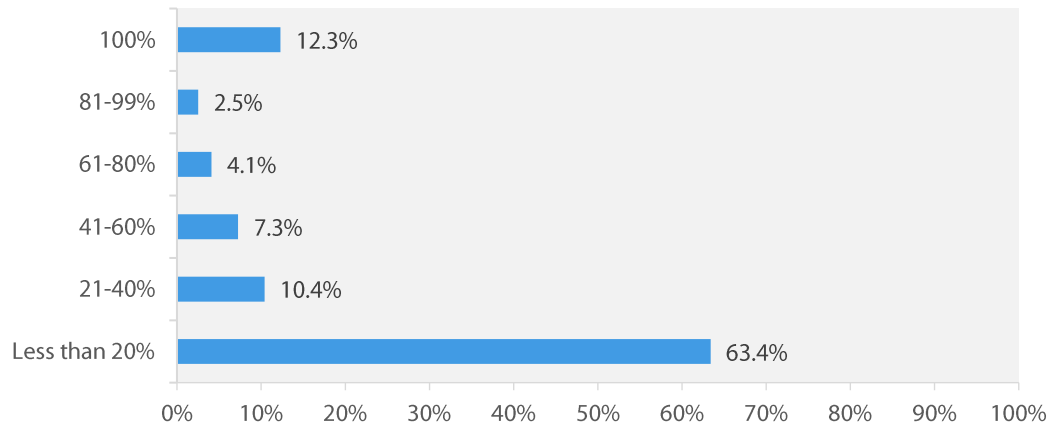
The largest cohort of musicians and industry professionals indicated having been in the **industry for more than 20 years**. At the same time, more than **one in five are new to the industry**, working less than five years in the industry.

Figure 17: How many years have you been working in the music industry? (n=323)



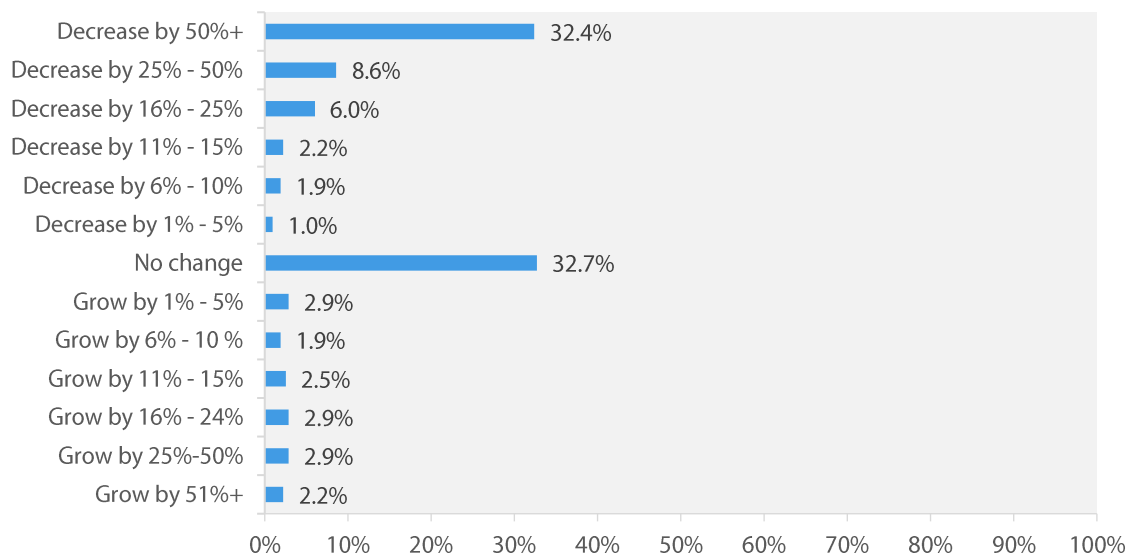
As visualized in Figure 18, most professionals indicated earning **less than one fifth of their annual revenue through music industry activities**, illustrating the part-time and often precarious nature of music industry income generation.¹⁶

Figure 18: What portion of your 2019 annual income came from your work in the music industry?



A significant majority of music industry professionals **projected either no change or a sharp decrease in revenues by at least 50% due to the effects of the COVID-19 pandemic**. This likely indicates that many (likely small, part-time freelancers) have been able to continue with their music activities with little impact, while those who have been impacted (musicians relying on live shows) have been significantly impacted.

Figure 19: How do you expect your income generated from work in the music industry to change in 2020? (n=315)



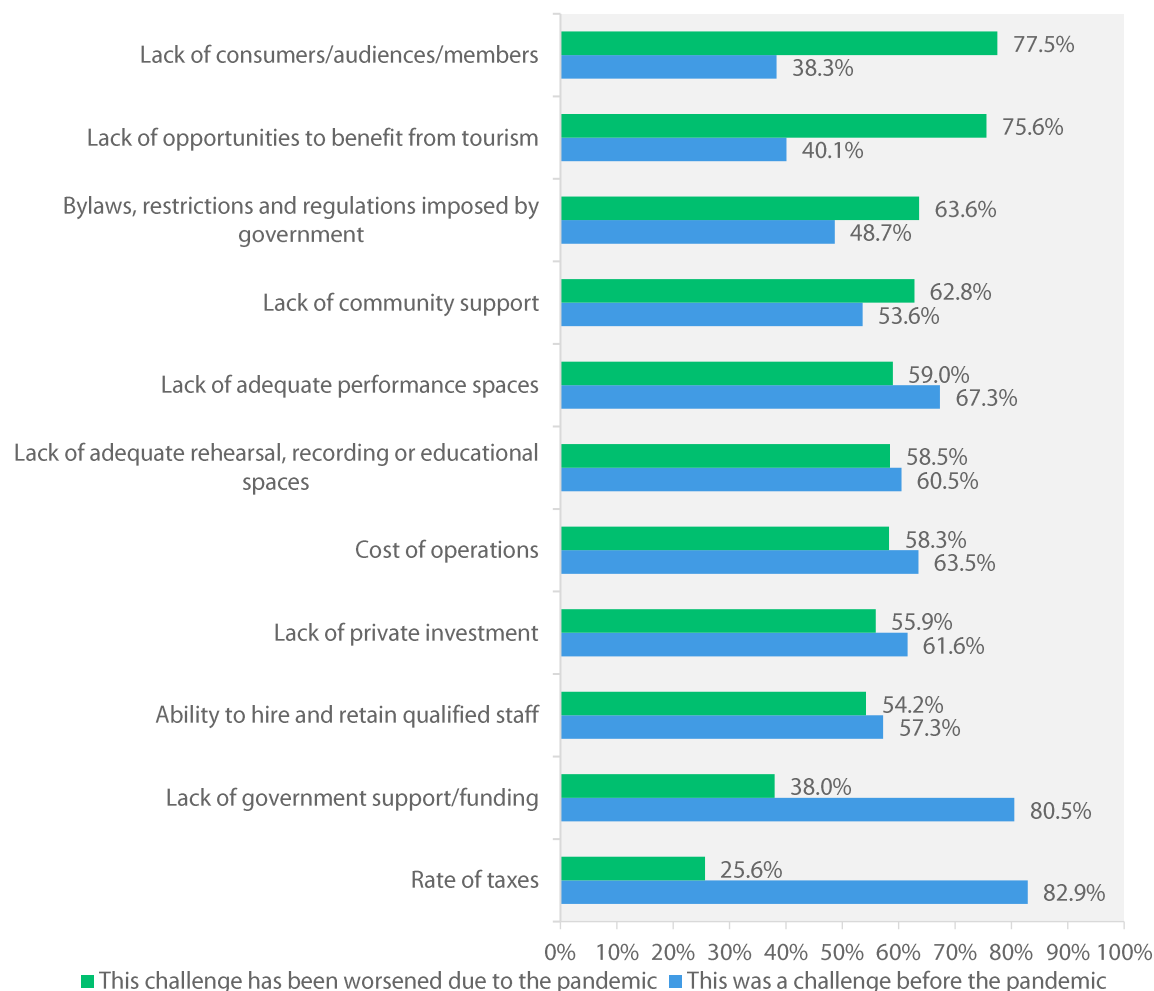
¹⁶

<https://www.tandfonline.com/eprint/HRX2MZCD3MIVBYMF7T4A/full?target=10.1080%2F09548963.2020.1770577&>

Regarding challenges that have worsened since the onset of the COVID-19 pandemic, the **lack of consumers/audiences was the most significant challenge (78%)**. In addition, more than three quarters indicated the **lack of opportunities to benefit from tourism** as a significant challenge due to the pandemic.

Figure 20 also indicates that the **rate of taxes and lack of government support were challenges before the pandemic**. Section 4.8 provides more detail on the specific challenges related to funding for musicians and music organizations.

Figure 20: What specific challenges, if any, do you currently face in your music profession in the Central Okanagan, before and during the COVID-19 pandemic? (n=295)



Insightful quotes from musicians and industry professionals in response to 'how could the music industry be improved in Central Okanagan' are listed below:

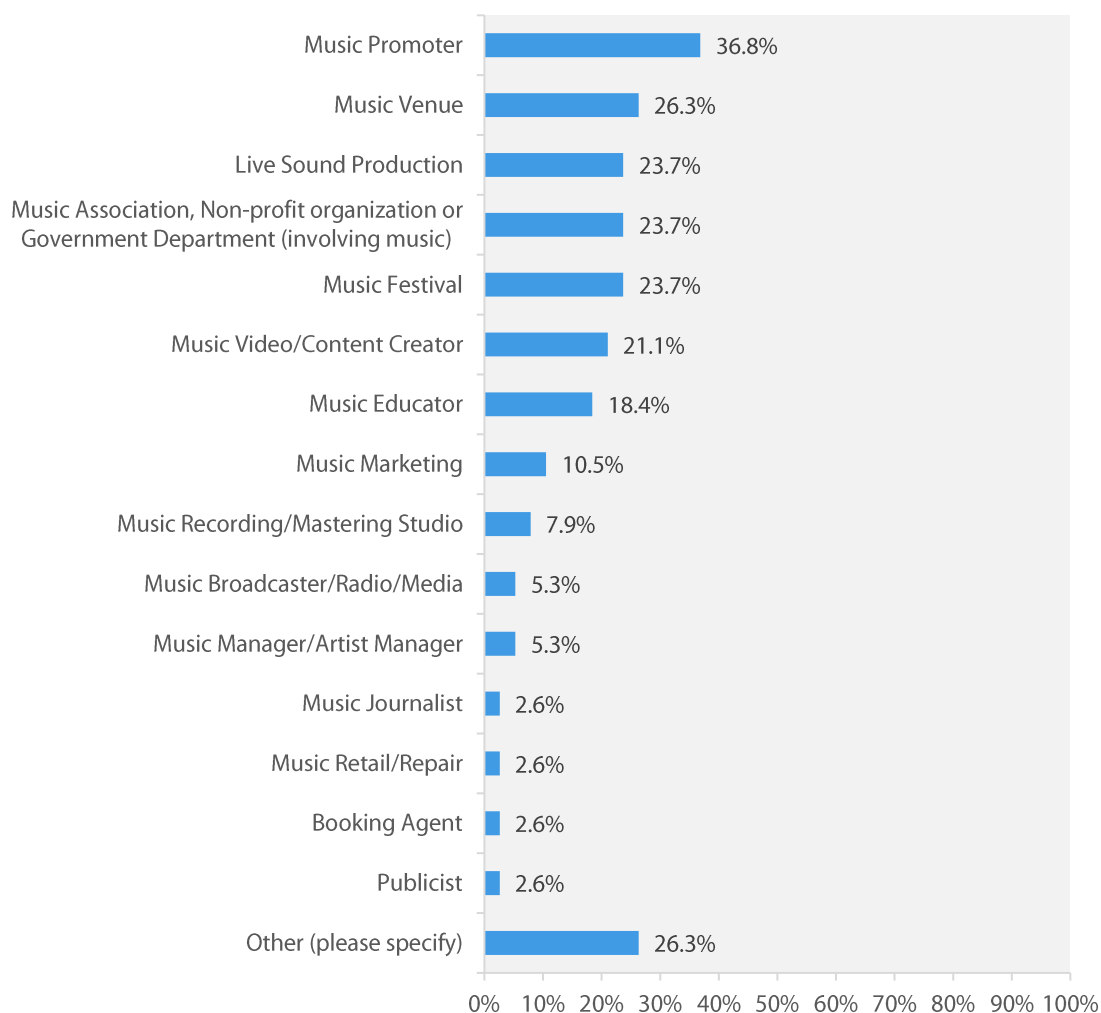
- "More marketing funds to advertise shows and grow the music scene and awareness."
- "Need to create more quality venues for out-of-town artists to play with local artists. With more out of town artists, locals would be more interested in coming to shows"
- "We could use a medium sized facility 400-800 capacity. We have small and large venues, nothing in between."

- “I believe the Central Okanagan is packed with talented musicians and they don't have enough opportunities or exposure. I think public media pages could feature musicians weekly to help them gain exposure and expand their fan base.”

3.2.2 Organizations

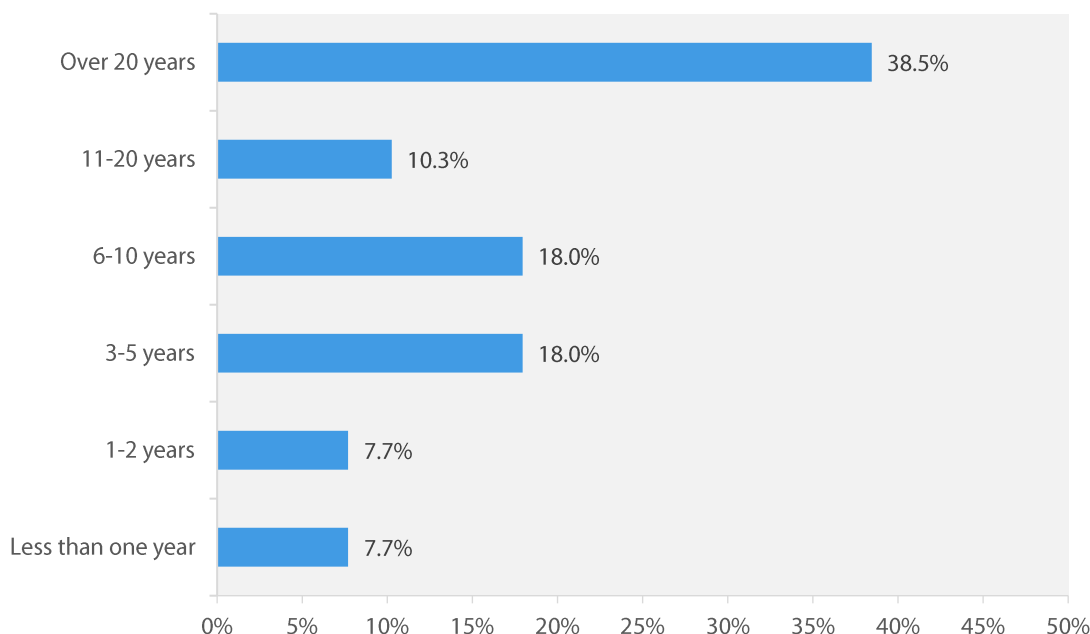
As illustrated below, the survey garnered 38 responses on behalf of organizations most commonly as **promoters or venues**. Those who selected ‘other’ identified as other varieties of performing arts roles relating to music, as well as freelance photography and those offering specific programming like music classes for seniors.

Figure 21: Please select the role(s) of your organization (n=38)



Similar to industry professionals, the largest cohort of organizations indicated being in the **industry for over 20 years**. This reflects stakeholder sentiments that there exists a strong foundation of long-time music stakeholders in the Central Okanagan, or as one stakeholder noted, “**there are a lot of ‘old-guard’** musicians and organizations here.” While an established community is a definite strength, there exists a disconnect between historically siloed or insular groups, whereby a gap remains between genres and demographics. Further insight into the local music community and organizations can be found in Section 4.6 and 4.7.

Figure 22: How many years has your organization been established in the Central Okanagan? (n=39)



As tabulated below, the industry is made up of smaller organizations that rely **largely on contract and volunteer workers**, which is also reflected in the broader provincial live music industry.¹⁷

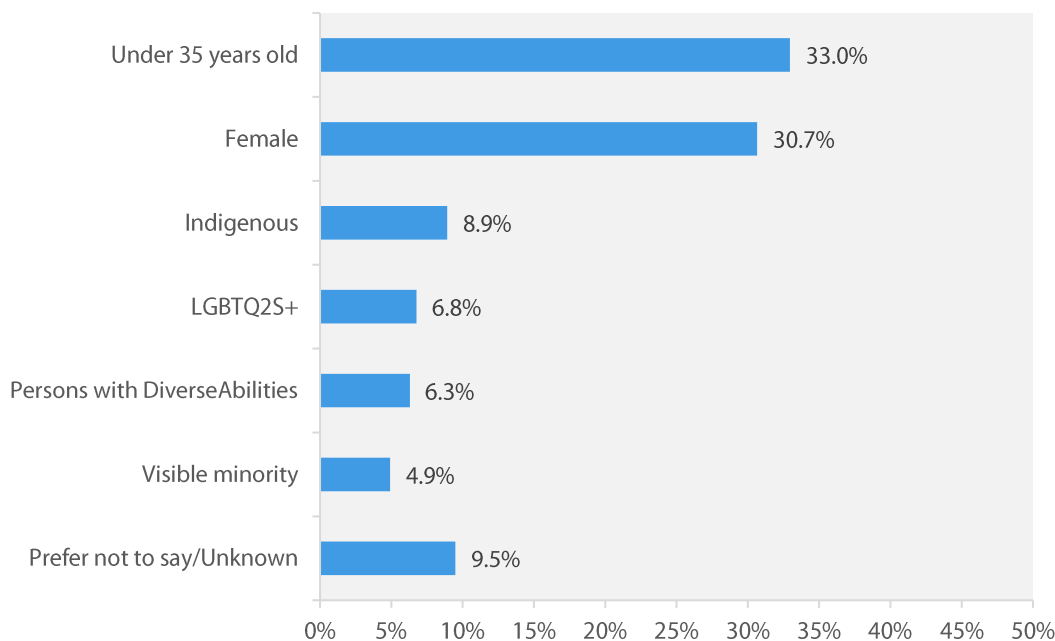
Figure 23: How many people (on average) did you organization employ during your last fiscal year in each of the following employment categories? (n=38)

Type of employee	Average # of employees
Full-time, regular salaried employees	2.2
Part-time, regular salaried employees	5.1
Temporary/contract employees (average monthly count)	9.3
Volunteers	9.7

¹⁷ <https://canadianlivemusic.ca/wp-content/uploads/2018/05/Here-the-Beat-The-Economic-Impact-of-Live-Music-in-BC.pdf>

As illustrated in Figure 24 below, the industry employs a **large proportion of women and people under the age of 35**. In addition, according to 2016 Census data for Kelowna,¹⁸ 6% of the population identify as 'Aboriginal', making the nearly 9% employment rate of those who identify as **Indigenous higher than the estimated average** population for the Central Okanagan. However, based on the same data, the visible minority representation of workers (5%) is lower than estimates based the same data (8%). While this is based on a small sample size of organizations, it indicates there may be further room for growth relating to hiring visible minority workers in the industry.

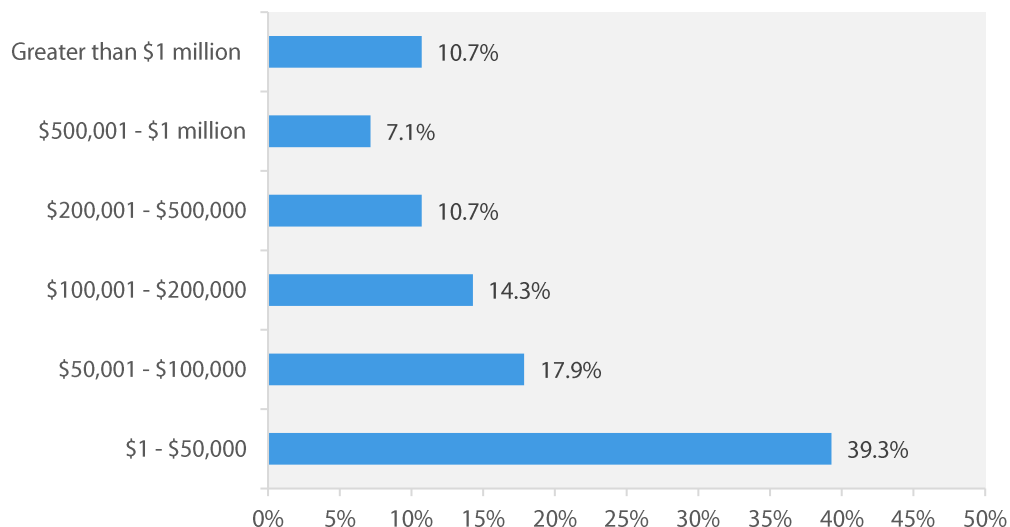
Figure 24: Please indicate the percentage of your workforce that identify in the following categories. (n=31)



¹⁸ <https://www12.statcan.gc.ca/census-recensement/2016/dp-prof/details/page.cfm?Lang=E&Geo1=POPC&Code1=0403&Geo2=PR&Code2=48&Data=Count&SearchText=Kelowna&SearchType=Begin&SearchPR=01&B1=All&TABID=1>

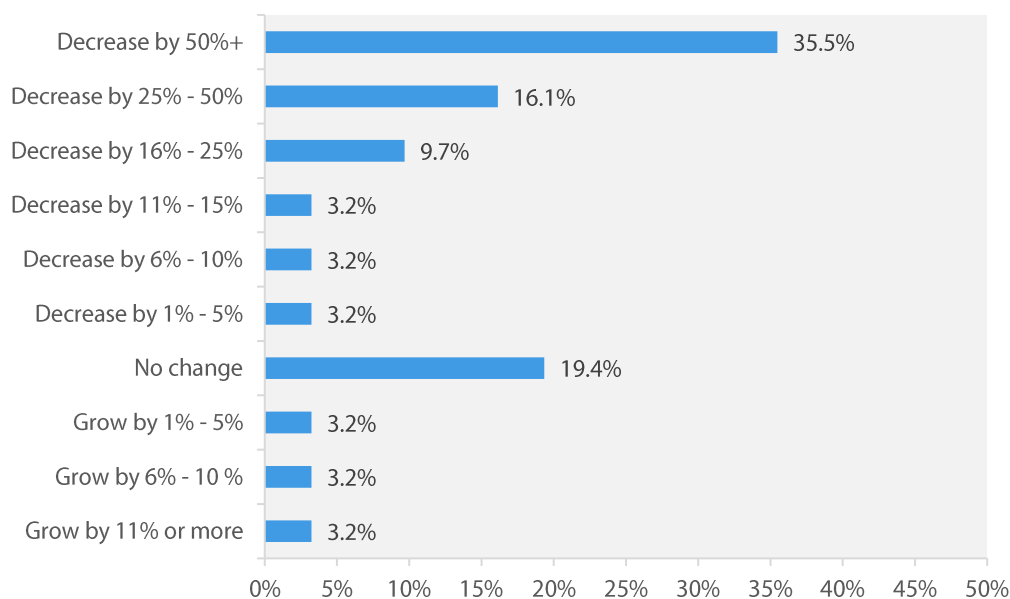
As visualized below, the **largest cohort** of organizations reported revenues **less than \$50,000**. On **average**, organizations reported revenues of **~\$240,000**.

Figure 25: In 2019, what was your total or gross revenue or sales? (n=29)



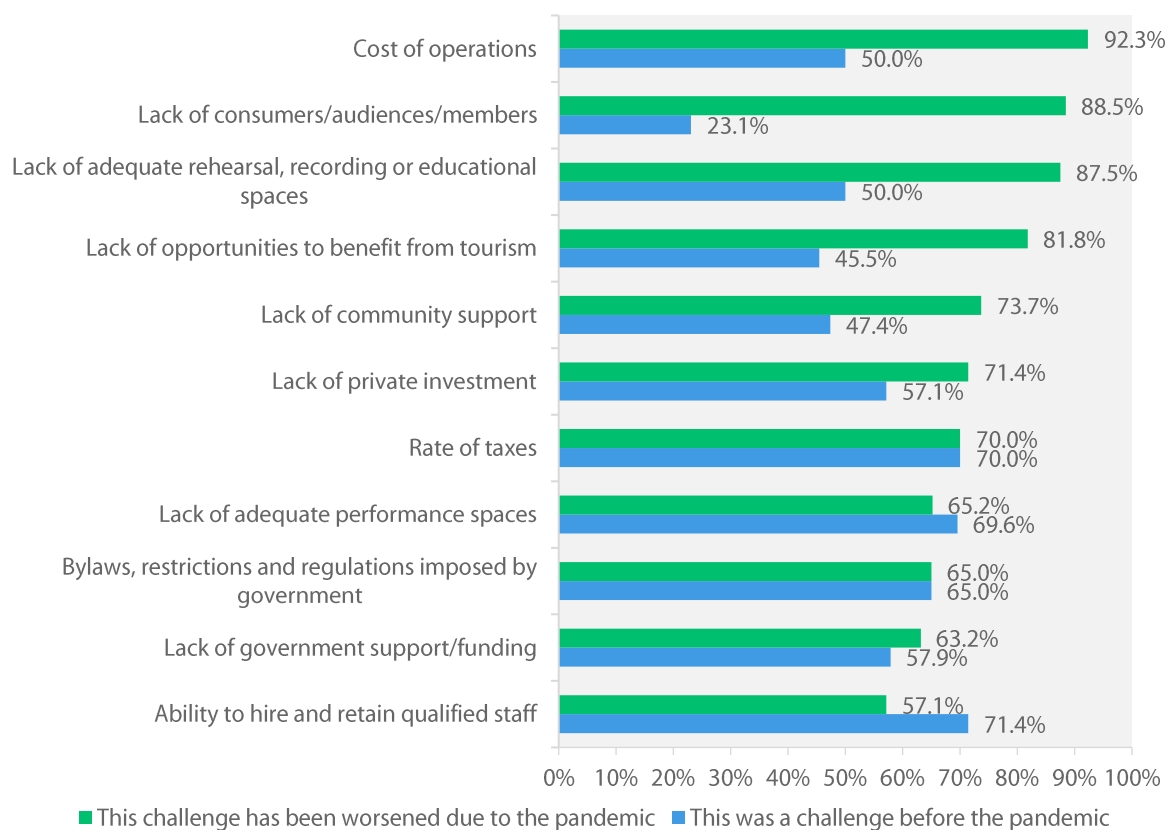
The largest cohort of organizations projected their **revenues will decrease by more than 50% (36%)** while nearly one in five projecting no change.

Figure 26: Compared to 2019, how do you expect your 2020 gross revenue or sales to change? (n=21)



As shown in Figure 27, the notable decrease in revenue is likely attributable to rising costs of operations (e.g., health and safety measures leading to shutdown of venues) and a lack of audiences during the pandemic.

Figure 27: What specific challenges, if any, has your organization faced in the Central Okanagan's music industry, before and during the COVID-19 pandemic? (n=33)



Some key quotes from organizations in response to 'how could the music industry be improved in Central Okanagan' are listed below:

- "Access to funding and reasonably priced venues. We were absolutely shocked by the rental rates here compared to Calgary when we first moved back to BC."
- "More venues, more funding for artists (grants are quite often way too difficult for most artists to acquire)."
- "Save the current live music venues. Help with rent and expenses so they can survive and rebound. These companies have the knowledge and support to thrive under normal conditions."
- "Help with some of the costs of promoting local artists to help them get to the next level. Scout the best talent and aide them with touring provincially, across Canada / North America."
- "More and continued collaboration. Recognition of and response to the generational shift and natural attrition of local and regional industry professionals and supporters that is happening (i.e., try to prevent loss of "institutional knowledge" from live music venue staff, musicians, music industry suppliers)."

4. Key Considerations from Engagement

In addition to the survey and comprehensive secondary research, the public consultation process included focus groups and interviews, which provided numerous insights. The following sections offer key considerations, or departure points, for unpacking the various **strengths, weaknesses, opportunities, and threats related to the music industry in the Central Okanagan**. These insights were gathered as part of a wide-ranging and comprehensive research phase, through an online survey, focus groups, and interviews with sector stakeholders. Key results from the survey are also highlighted in graphs and figures, which draw out key learnings regarding barriers, challenges, and priorities of residents and musicians as the community considers the direction for a Central Okanagan Music Strategy.

Recent research in the region, such as Kelowna's 2019 Creative Sector Economic Impact Assessment, highlight the inherent economic and social value of music within various streams of creative industries, from performing arts education to events and festivals. The Impact Assessment notes the significant expansion of the creative sector in the last decade, with the music and performances as the largest cultural revenues. These reports, among others explore the future of the Central Okanagan (e.g., Imagine Kelowna 2040 Report) and provide the basis for the following departure points. The following table provides a high-level SWOT analysis of the Central Okanagan's music industry, based on existing research and the numerous engagement activities with industry stakeholders:

Table 2: SWOT Table

Strengths	Weaknesses
<ul style="list-style-type: none"> High number of talented and global quality musicians Natural beauty that attracts new residents and provides great outdoor venues Supportive community that are passionate and trying to make positive change Strong tourism sector, including wineries that often support live music Strong youth scene (jazz, classical, rap/hip hop) incl educators, mentors, opportunities 	<ul style="list-style-type: none"> Lack of awareness about events and opportunities Shortage of suitable and scalable venues for performing, jamming, rehearsing, or collaborating and mid-size acts Accommodation costs for touring acts Disconnect between City, funding organizations and artists (missing simple, more flexible funding) Collaboration can be challenging as genres and demographics have been insular (siloed), often to leading to a lack of crossover even between local radio stations Lack of opportunities to network or get mentors needed Challenging municipal policies and bylaws relating to noise/sound public space usage
Opportunities	Threats
<ul style="list-style-type: none"> Strengthened tourism collaboration/marketing Chance to grow audiences as residents express a desire for more live music events year-round Community building through utilizing grassroots organizations and businesses that want to invest in the community Leverage existing youth education, mentorship, and opportunities 	<ul style="list-style-type: none"> Short and long-term impact of COVID-19 pandemic Music is being devalued globally – it is seen as cheap and abundant Competition for high quality, affordable, convenient entertainment. Increasing cost of living in Kelowna (i.e., Housing) Not enough support for specific groups (Indigenous artists, LGBTQ2+ artists) Lack of experienced promoters or other talent required for live shows

4.1 Attractive Hub for Musicians

A key theme throughout research was that the Central Okanagan is ripe for growth within the music industry, in part because of the **unique lifestyle that musicians can lead in the region**. It was widely agreed that the geography, community size, climate, and music community of the Central Okanagan is a key attraction for young and emerging artists that wish to develop their skills and build their audiences. In addition, stakeholders noted that because it is a smaller city, it is often **easier for artists to be noticed** and to succeed. With that, the Central Okanagan region is developing its range of musical and creative offerings – a key opportunity for other industries and communities to leverage in tandem.

When **compared to larger cities** such as Vancouver or Toronto, Kelowna is **considered more affordable**, allowing musicians more opportunity to dedicate themselves to music.¹⁹ However, the **increasing cost of living is a challenge**, as noted in the Kelowna 2020-2025 Cultural Plan, “the unaffordability of spaces for living, working and creating is a challenge for many artists.”

Looking forward, many noted that it will be essential to ensure that **emerging artists who chose the region for affordability reasons are able to stay**, with adequate funding opportunities, locally sourced grants, and accessibility to new audiences as Kelowna and surrounding communities grow.

“[I] can be a pro musician, and the community supports that choice/her livelihood – don’t have to seek additional jobs here – ability to live and afford life here!”

Advisory Group Member

4.2 Youth in Music

“Music needs to be recognized and valued as much as hockey and soccer. Playing an instrument grows the brain, at any age, more than pretty much any other activity.”

Survey Respondent

Developing local talent and burgeoning artists starts with music education. In the Central Okanagan, many music education programs have historically been disconnected from the ‘business-side’ of the music industry, meaning that those graduating with degrees in music do not necessarily have the industry skills required to succeed. As a result, many stakeholders identified a **need for professional development** workshops to bridge this gap (e.g., through webinars, wellness and leadership groups, and retreats).

There is also an **untapped opportunity to engage youth** in music from a young age, especially relating to engaging youth who may not be involved in sport. The theme of venues (Section 4.3) is also impacting youth engagement as it is challenging to find adequate and purpose-built spaces for young emerging artists to play when they are training or after graduation. Similar to the theme of developing audiences, some stakeholders expressed worry that the strong cohort of **musicians and creatives in Kelowna may not return** to the Central Okanagan once they leave. That is, many talented youths take further studies in music at universities, often in Toronto or Victoria, and do not return afterwards. Many music events are not open to all ages, ultimately excluding youth from participating and benefitting from the local music scene. As noted in survey responses, being a minor is a challenge as **youth cannot attend venues where the artists they would like to see are performing**. Making these events cheaper to better engage youth, as well as other groups, was also noted a key means to make events accessible to larger audiences.

“The Okanagan lacks good all ages venues that aren’t too big or expensive to book for local artists.”

Survey Respondent

¹⁹ Kelowna Creative Sector Economic Impact Assessment (2019).

More **collaboration between groups** was noted as a **potential catalyst for successfully engaging youth**. For example, mixing other disciplines such as school choirs and jazz bands between different secondary and music schools.

4.3 Venues

As illustrated in Figure 11, stakeholders note **too few purpose-built venues in the Central Okanagan**, though there are a number of options for outdoor performances, such as wineries and parks. Most commonly identified throughout discussions was a specific need for a midsized venue to support touring acts with **capacity for an audience of 300 to 500**, or a 'smaller version of the Commodore.' At the same time, though less frequent, some also mentioned a gap in a larger (800+) venue. The music industry is not alone in identifying a need for facilities, given one of Kelowna's Cultural Plan goals is to commit to developing new facilities, including increasing available production space for local artists.

"Lack of any affordable 100-500 person venues, largely limiting any growth of local music scenes, or the capacity to book and host outside artists and encourage their visitation to our city/community."

Survey Respondent

The recent loss of important venues which were important for **smaller acts and performances**, has hurt local artists. Artists also noted a **gap in places to collaborate or rehearse**. While this has an obvious impact on artistic creation it also has an important impact on industry growth, as there is not a hub for organic collisions or a place to connect for mentoring and partnership opportunities.

"Kelowna's music scene is very exciting and has many fantastic artists! It would be amazing for these artists to have more music-oriented venues, that would add so much to the music scene in the area."

Survey Respondent

As demonstrated in Figure 14, over 57% of respondents to the sector-wide survey indicated that new or improved venues are the top priority in developing the music industry in the Central Okanagan. According to survey respondents, existing venues do not provide optimal acoustics, or have limited seating, discouraging attendance and pushing audiences to Vernon or Penticton with more events and superior venues. This need for new or **improved spaces is echoed by both audiences and artists**, amplifying both the desire for more music events (as noted in Figure 11) and more suitable venues to accommodate a

growing music ecosystem. Accessibility to such venues is a contributing factor, with many noting the cost of parking and lack of public transit to music venues (as illustrated in Figure 13). There is also a desire to support venues in addressing these challenges, including incentives and the removal of red tape.

4.4 Audience Development

Our survey data shows that people want to go to more live shows, but the potential audiences now have a plethora of cheap and convenient entertainment options. To retain and develop a new audience will require a better, more diverse and engaging way for them to experience music. With the advent of streaming, the public now has access to abundant, low cost, convenient, high quality music. The audiences increasingly **expect to pay little to no money** to attend live and local music events. This lack of desire to show financial support for local artists may be due to the fact that though audiences enjoy music events, they may not understand its true social and monetary value in their lives, and the richness that the industry brings to their community.

"The biggest challenge is support from the public. We need to encourage people to come out and support live music. If the audience isn't there, there is no incentive to venue operators."

Survey Respondent

"I'd love to see more diversity in the types of music that are played at live events."

Survey Respondent

The ever-quickenning advancement of the **digital age** has meant the people now **want to and expect to engage differently**. This offers both a challenge to artists and the opportunity to add creative elements in their works. For example, through artists and audiences to connect through jam sessions. Engagement in the music industry is not simply a passive listening experience through platforms such as Spotify – the desire to engage in new ways is stronger now than ever before. There is

also a desire for more variety and diversity in music – a theme highlighted throughout stakeholder engagement.

Challenges related to developing audiences exist in tandem with opportunity. The acceleration of passive engagement online due to the onset of COVID-19 and ongoing restrictions on in-person gatherings make some stakeholders concerned **that previously committed audiences may not return** to in-person events after becoming accustomed to engaging online. While it is also possible that demand will be high after restrictions are lifted, most noted that the music industry will need to provide the incentive for the audience to come back once restrictions are lifted.

4.5 Awareness

Lack of awareness, as demonstrated in Figure 12, is a key challenge or barrier experienced by stakeholders in accessing music events in the Central Okanagan. There are varying possible reasons for this lack of awareness, the first being that people **do not necessarily know where to look for music events**. In other words, many feel there is a lack of a centralized platform (online or physical) where people can go to for information on upcoming music events, venues, and festivals. While some called for a need to create a one-stop-shop, it is also notable that **existing or past efforts are often unknown to audiences and industry stakeholders**. As such, it is unlikely that 'creating' a new platform is necessary, it may be the case that **improved awareness of existing ones is more critical**.

"[It is] hard to find events at times. I would like to be able to go to one spot to find out about local musical events rather than having to check by location or venue."

Survey Respondent

"Wineries are such a cool venue, but I usually don't hear about events there until it's too late."

Survey Respondent

Another contributing factor to lack of awareness is that certain **popular news sources, such as radio stations, continue to operate in silos**, whereby each station has a specific target audience and knowledge sharing amongst stations is perceived as limited. As such, there is less ability to reach new audiences using this medium. Respondents to the survey also noted that though they would like to attend events, they often hear about them too close to the date or

after the fact. This sentiment indicates that news sources and platforms sharing such information may not be adequately reaching audiences early enough.

This theme of awareness is closely linked to that of **accessibility**, whereby some groups, such as seniors, people with disabilities, or people with families, have limited access to events and are not sure of where to look for events that suit their needs. For example, events are often too late in the evening for families and seniors to attend, particularly during winter months. Parking, as well as lack of ability to rely on public transportation for those without a car, were noted as key barriers for respondents, as demonstrated in Figure 13.

4.6 Partnerships and Collaboration

Innovative and collaborative partnerships across organizations are also key to strengthening the music ecosystem. Helping organizations and businesses to work with the municipalities on reducing red tape (rules and regulations) related to performances, rehearsals, applications, promotion, noise, and parking, could lead to a more vibrant local music industry. For these partnerships to thrive, more coordination and clear communication are needed at all levels of the industry, from grassroots organizations to larger performing venue management. Clear communication would also allow for more streamlined information on how to put on a show, or how to partner with other artists on municipality-led projects, for example.

"It can't be up to one stakeholder group, can't be just promoters, or just be the City leading this strategy forward. The industry, including the artists, need to work together to generate creative ideas."

Interviewee

"It's often more up to the artist to do the promoting and ticket sales, which has its pros and cons. Whenever cafe shows, house shows, or "informal" shows happen, they can be really meaningful, but very rarely because of any work that the venue itself has done. Having a solid, 80-160 capacity venue dedicated to cultivating local, provincial, and international artists is what we need."

Survey Respondent

There is an important opportunity for collaboration between the music and the tourism sector in the Central Okanagan. Kelowna has over the years developed its identity through its promotion of high-quality food and wine. Adding music to the mix seems only natural in elevating local sectors and highlighting everything the Central Okanagan has to offer. With that, stakeholders noted that tourism has a different measure of success than music such as the number of hotel rooms booked or the number of visitors at **local wineries**, whereas the music industry might demonstrate tangible value by number of tickets sold or attendance at events. However, both industries face specific challenges in measuring and demonstrating the true value gained from those activities.

The value of music, despite being hard to quantify, is just as essential to the experience of locals and visitors alike. This value would need to be reflected through the **fair compensation of local artists who collaborate with local partners**. Examples of such successful collaborations regionally, like the City of Victoria's August Symphony Splash, were noted by stakeholders, as well as Summerland's cross-promotion of annual music events with the City around certain seasonal holidays. Strengthened partnerships, both between sectors and between organizations, are of key importance to those within the music ecosystem in the Central Okanagan.

4.7 Community

"I think it's hard to get involved when you don't really see access points. More opportunities are needed to create a community in the Central Okanagan."

Survey Respondent

The importance of **community is a cornerstone to the Central Okanagan**. It is kept strong by well-connected groups of creatives and longstanding, established organizations made up of artists both within and outside of the music industry. As one stakeholder noted, there is **"passion in the music community"** - people who love what they are doing and are eager to participate, knowledgeable, capable. From recording studios, types of musicians, educational opportunities, lots of people working in various facets of the sector." Despite a tight-knit community, there is still a gap in meeting **the desire for networking and getting to know more people**, particularly in other creative disciplines that intersect with music as part of their performance

presentations.

The community at large generally supports music and the cultural sector, recognizing its value to their lives and the quality of life in the region. Businesses and industry also share reciprocal support with the music industry, wishing for it to succeed as much as their own industries or sectors. **The COVID-19 pandemic has further highlighted the importance of community**, particularly as it relates to supporting local businesses, organizations, and artists in times of uncertainty. The ‘support local’ movement across many communities will continue to be valuable in enabling economic recovery. There is now a strong desire for shared experiences, which has potential to translate into strong engagement as the region works towards economic recovery. Building on this, alongside goals stipulated within the Kelowna’s 2020-2025 Cultural Plan (e.g., Goal 10: Convene and Connect) will help to facilitate continued dialogue and explore opportunities for broader involvement of all in the music industry.

“Regular meeting of scene members and professionals in the industry that isn’t just everyone and their dog trying to land gigs. I would love to sit down with other music industry people and talk about constructive ideas that aren’t going to be overshadowed by dozens of people trying to get work.”

Survey Respondent

4.8 Funding

“Better municipal government support with funding and better government and private support for new venues”

Survey Respondent

Noted throughout the engagement was a lack of access to funding, lack of awareness about existing funding, and limited knowledge of where to find such resources. A goal within Kelowna’s 2020-2025 Cultural Plan – is to *develop funding that strengthens and fosters a more inclusive community* (Goal 1). **More accessible, streamlined, and flexible funding** designed to facilitate business partnerships between musicians and for-profit businesses was noted as a key means to further strengthen such cross-sectoral ties. There were also requests for **support in grant writing**, and access to organizations that have capacity to assist. In this same vein, **musicians, venues, and promoters could benefit from closer ties with the business community** who could provide support and guidance on how to reach new

audiences and develop branding. Not-for-profit stakeholders noted challenges monitoring funding changes or new opportunities and expressed the value in a possible ‘curator’ of music funding opportunities. Given the challenges of funding and promotions noted by local artists, closer ties between community organizations, businesses, and music organizations could result in a stronger community at large, so long as they are simultaneously supported financially.

4.9 Seasonality of the Local Music Industry

As illustrated in Figure 11, the music industry in the Central Okanagan is largely seasonal, with events primarily running from May-October but occurring less frequently during the winter months. Closely linked to the importance of community, the seasonal nature of the local sector means that musicians face a low season, and audiences lack the vibrancy they desire from November-April. **More variety in events are needed**, with a mix of indoor and outdoor venues that are accessible to all those wishing to attend. Making music year-round instead of just seasonal is seen as a key contributor to growth and sustainability of the local music industry. This could include allowing artists and audiences to engage in more intimate settings, including with youth and families in all ages-concerts and festivals.

“[I’d like to see] more year-round support for musical events. Most accessible events are just summer/park type events.”

Survey Respondent

4.10 Indigenous Artists and Equity Seeking Groups

Recent racial justice movements and calls for equity globally across various levels of society, including in the creative sector, have brought to the forefront the inequalities that continue to prevail. Music industry stakeholders in the **Central Okanagan recognize that more diversity and elevation of historically underrepresented groups is a priority moving forward.**

At the centre of this work is the specific need to support **Indigenous artists** in the Central Okanagan through building capacity and opportunities for Indigenous artists to be promoted. During focus groups, it was noted that Indigenous artists in the region face intrinsic barriers inherent to indigeneity that negatively impact their abilities to thrive, such as lateral violence and lack of access to supports.

"Inclusion will be key to encourage allyship and understanding between Indigenous and non-Indigenous artists."

Focus Group Participant

As part of the engagement process, Indigenous musicians also shared that while the Indigenous music community is deeply connected and supportive of one another, there is still a disconnect between funding organizations and the artists. There is also little understanding by the 'mainstream' that Indigenous artists bring contemporary music to the table and not just traditional forms, further exacerbating stereotypes and the 'boxing out' of artists.

This exclusion is also felt by members of the IBPoC and LGBTQ2+ community, with some members expressing feeling unsafe at live music events. This means that there is work to do to ensure the **safety and well-being of the IBPoC or LGBTQ2+ communities**. This work presents an opportunity ensure individuals are elevated not only within the local music industry through financial support and dedicated grants, but that they are included in all aspects of society where they still feel unsafe and excluded.

Overcoming some of these challenges also provides key opportunities to leverage the strengths of groups that have been underrepresented and excluded. Indigenous musicians noted that working together is the only way to survive and thrive, particularly with organizations such as the BC Music Festivals Collective. It was noted that stepping beyond barriers to elevate musicians with different abilities, backgrounds, and genres needs to be done through more collective promotion efforts and increased platform development, online and in-person. It was widely agreed that **inclusion will be key to encouraging allyship and understanding between artist groups**, as well as with other sectors (e.g., more partnerships and collaboration).

5. Conclusion and Next Steps

The report above provides an important overview of the Central Okanagan music industry. It also establishes an important benchmark for future growth in the industry, to be used for evidence-based decision making and strategic planning for the region's music industry.

“It has to start now, now is the time for planning. That is to put programs, education, and venues in place. The music industry will rebound in a big way and we need to be prepared for it. ”

Survey Respondent

The key findings and concepts described in the report above will be used as a departure point for strategic planning in 2021. More specifically, the report completion marks the 'halfway point' of the [COMS development process](#) with three phases remaining:

- **Production** (Spring 2021) will include a collaborative **music summit** and the development of a **draft strategy**.
- **Movement** (Summer 2021) will focus on the confirmation and **validation** of the strategy in preparation for finalization and launching the plan.
- **Execution and Adjudication** (Fall 2021) will centre on **implementation** planning and establishing monitoring and **evaluation metrics** to assess success of the plan.

Upon completion of the strategy, it will have included extensive public engagement, music industry mapping through stakeholder identification, the development of a strong industry network through the Music Summit, and the creation of a strategy for Central Okanagan that will guide the future of music in the region and beyond.

Appendix A. Stakeholder Engagement Summary

In addition to the online survey described in Section 3 above, engagement also included virtual engagement directly with key stakeholders in the community through Key Informant Interviews (KIIs) and small Focus Group Discussions (FGDs).

A.1 Key Informant Interviews

The list below provides names of the more than 40 stakeholders engaged in 1:1 interviews.

Name	Organization/Role in Central Okanagan Music Industry
Adam Semeniuk	Redbird Brewing
Anna Jacyzyen	Musician (Jazz)
Antony Knight	Music student/composer/opera performer
Ben Klick	Musician (Country)
Bernie Wilson	Fernando's
Cam Wier	Musician (Metal)
Caroline Ivey	Kelowna Community Theatre, Manager
Chris Babcock	City of Kelowna, Event Development Supervisor
Christine McWillis	City of Kelowna, Cultural Services Manager
Christine Moore	Okanagan Symphony Orchestra (OSO)
Colleen Fitzpatrick	Rotary Center for the Arts, Executive Director
Conroy Ross	Musician (Rock) and Music Educator
Craig Thomson	Musician (Jazz) and Music Educator
Dan Tait	Promoter/Venue/Musician
Dustyn Baulkham	LGBTQ2+S/Pride Society and Rebellious Unicorns/unicorns.live
Graham Vink	Dance/Theatre
Jacob Pasterfield	Musician
Jen Goulet	Footwerks
Jenny Money	Okanagan Indigenous Music & Arts Society
Joe Berarducci	Music Educator
Kenny Wayne	Musician (Blues)
Lee Simon	Revelry Venue
Leila Neverland	Musician
Lisanne Ballantyne	Tourism Kelowna, Executive Director
Melissa McClusky	Tourism Kelowna, Marketing
Micheal Elliot	Musician (Alt), Video Producer and Farmers Market
Mike Guzzi	Educator and Studio 9, CEO
Mitch Carefoot	Thick as Thieves Entertainment (Promoter)
Neville Bowman	Musician (Jazz)
Noel Wentworth	Wentworth Music (Retail and Education)
Olivia Walsh	Okanagan Symphony Orchestra (OSO)
Paco Merinero	Marmalade Cat Cafe
Peter Angel	Stingray Radio, Okanagan, Station Manager
Quinn McGraw	Musician (Metal)
Renata Mills	Festivals Kelowna

Name	Organization/Role in Central Okanagan Music Industry
Richard Smith	District of Peachland
Rick Halisheff	Musician (Blues)
Robin Jarman	Music Educator
Rosemary Thomson	Opera Kelowna and Okanagan Symphony Orchestra (OSO)
Ryan Donn	District of Lake Country/Creekside Theater
Sam & Jake Cook	Musician
Sandra Babbel	Opera Singer and Educator
Savannah Bradshaw	Stingray Radio, Okanagan, Promotion Director
Sheila French	Kelowna Senior Secondary Music Director
Stephen Buck	Musician (Jazz) and Music Educator

A.2 Focus Group Discussions

In addition, **9 thematic focus groups** were hosted, listed below:

- Advisory Group Members
- Community Groups (including arts councils)
- DIY/Home Concerts
- Dance/Theatre
- Indigenous Musicians and music professionals
- Local Musicians
- Nonprofits Presenters and Producers
- Theatre
- Venue owners/promoters

Appendix B. Examples of COVID-19 Music Recovery Support

Other jurisdictions are taking many different approaches to support live music – from dedicated music industry funding, to human resource support, and tourism investment. Examples from around the world are outlined below:

Jurisdiction	Actions	How this supports Music Industry	Type of support
Toronto, ON	Research on the impact on live music venues and recommendations for helping them survive.	Providing evidence for support from all levels of government and coordinated approach to recovery.	TBD
Seattle, WA	Dedicated funding for venues - \$2 million is designated to assist science and arts-education organizations, as well as live music venues.	The music venues portion will be administered by the county Office of Performance, Strategy and Budget. The funding for music venues requires that venues bring back staff.	Funding – venue specific
Liverpool, UK	Re-allocating money from a strategic investment fund to form a Music Industry Support Fund	Grants to music-related businesses (The first £5,000 of all agreed awards will be treated as a grant. Any investment over £5,000 will be subject to a 0% interest repayment based on a number of commercial factors over the coming 24 months.)	Funding – music related businesses
London, UK	Dedicated £2.3 million emergency culture funding	Music Venue Trust receives a £450,000 donation towards its #saveourvenues campaign in aid of at-risk grassroots venues	Funding – venue specific
Huntsville, AL	Established the “Creative Professionals Emergency Response Program”	Hosting emergency, one-week virtual programs for artists, musicians, and creatives affected by the COVID-19 outbreak. Daily webinars and one-on-one consultation offered to help artists, musicians, and creatives identify understand and help secure resources and funding	Human resources

In addition to the urban examples above, national level support for the music industry is also increasingly popular. For example, Australia has committed \$345 million to restart live music while France and Italy have both committed more €200m each to support recovery of the industry.