

Cape Breton Island's Vanishing Melody:

A FIGHT FOR SURVIVAL AND GROWTH

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Executive Summary

This report explores the state of the Unama'ki – Cape Breton Island music industry, providing insights into its economic, cultural, and social impact.

Brief Overview of Research Methodology

Data was collected through five comprehensive research tools, including surveys of musicians, music event attendees, business owners near venues, and music industry operators, alongside qualitative interviews with musicians. The study aimed to assess the industry's health, identify key challenges and opportunities, and offer actionable recommendations for strengthening the sector. A total of 120 musicians, 261 event attendees, 22 business owners near venues, and 25 music industry professionals participated in these surveys and interviews, representing a diverse cross-section of stakeholders.

Key High-Level Findings

The findings reveal both the vibrancy of the Unama'ki – Cape Breton music industry and significant challenges that threaten its sustainability:

1. **Economic Impact:** Music events drive substantial economic activity. Visitors attending events spend significantly more than locals, contributing an average of \$140 per day to the local economy during extended stays of nearly 12 days. Businesses near venues reported revenue increases of 20-40% on event days, underscoring the critical role of music in sustaining local businesses.
2. **Income Challenges for Musicians:** Over 50% of musicians earn less than \$15,000 annually from music-related activities, making financial stability a major barrier. Higher-income levels remain elusive, with less than 2% earning more than \$100,000 per year. This highlights the need for improved compensation and income diversification opportunities.
3. **Workforce and Infrastructure Gaps:** The industry faces shortages of skilled professionals, including sound technicians, booking agents, and event staff, limiting the scalability and quality of events. Infrastructure gaps, such as insufficient rehearsal spaces and outdated venue equipment, further constrain growth.
4. **Seasonal Reliance:** Music activity is highly concentrated during the summer and early fall, with limited opportunities in the off-season. This seasonal reliance reduces economic stability for musicians and businesses alike.
5. **Collaborative Opportunities:** Despite challenges, stakeholders recognize the value of partnerships. Collaboration between musicians, businesses, and community leaders can unlock new opportunities, particularly in marketing, event development, and year-round programming.

Top Recommendations

To address these challenges and leverage opportunities, the following strategic actions are recommended:

1. **Expand Funding and Financial Support:** Increase access to grants and funding opportunities for musicians, for-profit businesses, and event organizers. Support fair pay practices to ensure musicians are adequately compensated.
2. **Enhance Workforce Development:** Establish training programs for sound technicians, production staff, and other skilled roles to address workforce shortages. Partner with educational institutions to create mentorship and internship opportunities.
3. **Promote Year-Round Music Programming:** Develop off-season events and initiatives to stabilize income for musicians and businesses. Encourage winter and shoulder-season festivals to attract tourists during quieter periods.
4. **Foster External Market Reach:** Invest in export channels and partnerships to promote Unama'ki – Cape Breton's music on national and international stages. Expand marketing efforts to attract audiences beyond the island.
5. **Strengthen Collaboration Across Sectors:** Encourage partnerships between musicians, businesses, and tourism operators. Co-branded promotions and bundled event packages can enhance visitor experiences and generate additional revenue.

Introduction

The 2024 Unama'ki – Cape Breton Island Music Industry Report was developed by the Cape Breton Island Tourism Training Network (CBITTN), a three-year initiative focused on post-pandemic recovery for the island's tourism sector. Funded in part by the Government of Canada's Sectoral Initiatives Program, the CBITTN is overseen by Cape Breton University's World Tourism Institute in collaboration with Destination Cape Breton and the Cape Breton Partnership. The CBITTN is dedicated to providing tourism operators on Unama'ki – Cape Breton Island with the research and training needed to strengthen the industry and foster long-term growth.

The purpose of this research project, conducted between August 9th and October 16th, 2024, is to provide a comprehensive understanding of the Unama'ki – Cape Breton Island music industry, examining its economic impact, cultural significance, and the challenges faced by its stakeholders. By gathering data from musicians, event attendees, business owners, and industry professionals, this report aims to highlight the interconnected dynamics of the music ecosystem on Unama'ki – Cape Breton Island. The insights generated from this research are intended to inform strategic decision-making and foster collaboration among stakeholders, including musicians, business leaders, policymakers, and community organizations. Ultimately, this project seeks to identify actionable opportunities to strengthen the music industry, enhance its sustainability, and ensure its continued contribution to the cultural and economic vitality of Unama'ki – Cape Breton Island.

Research Methodology

Detailed Description of Survey Populations

The research methodology for this comprehensive study on the Unama'ki – Cape Breton Island music industry was designed to capture a holistic understanding of the local music ecosystem through multi-perspective data collection. By employing a mixed-methods approach involving quantitative surveys and qualitative interviews across four distinct stakeholder groups, the research aimed to provide a nuanced and robust analysis of the current state, challenges, and potential opportunities within the island's music industry. This methodological diversity ensured a comprehensive exploration of the subject, capturing insights from musicians, business operators, event attendees, and local businesses.

Musicians and members of the music industry were identified and contacted by Jennifer Currie and Shauna Walters, local consultants in the Unama'ki – Cape Breton Island music industry, and consultants in this research. Questions for the surveys and qualitative musician interviews were designed by the CBITTN research team. Qualitative musician interviews were conducted by Shauna Walters. Interviews of music event attendees and local businesses near venues were conducted by the CBITTN research assistants. Musician and business operators survey responses were collected through a combination of phone interviews and survey links emails to potential participants. The five data collection tools are summarized below.

Musicians Survey

- Total Participants: 120

- Survey focus: Challenges in local music scene

The contact list for the musician survey was assembled by Jennifer Currie and Shauna Walters. Musicians were also contacted through an email list provided by the Cape Breton Music Industry Cooperative (CBMIC), a non-profit organization supporting Unama'ki - Cape Breton's music industry. The survey was conducted primarily over the phone by Shauna Walters.

Business Operators Survey

- Total Participants: 25
- Pool: 45
- Survey Focus: Financial trends and impacts of the music industry

The contact list for the business operators survey was assembled by Jennifer Currie and Shauna Walters. The survey was conducted both over the phone by Jennifer Currie and through an online link directly to the survey emailed to potential survey participants.

Music Event Attendees Survey

- Total Participants: 261
- Survey Focus: Spending trends and music's impact on travel

Participants for the music event attendees survey were approached in-person and invited to participate by CBITTN's research assistants at music events across Unama'ki – Cape Breton Island.

Local Businesses Near Music Venues Survey

- Total Participants: 22
- Survey Focus: Financial impact of music events

Participants for the survey examining local businesses near music events were approached in-person by CBITTN's research assistants and invited to participate. Businesses were selected by the research assistants based on proximity to a music event or music venue.

Qualitative Musician Interviews

- Total Participants: 19
- Interview Focus: In-depth exploration of music-related responsibilities and challenges

Participants in the qualitative interviews were invited to participate through a group email using the CBMIC musician email list. Additional potential participants were contacted directly by Shauna Walters. Interviews were conducted by Shauna Walters and mainly completed over the phone.

This multi-method research approach provided a comprehensive and nuanced understanding of the Unama'ki – Cape Breton Island music industry. By collecting data from diverse stakeholder groups using both quantitative and qualitative methods, the research captured a holistic view of the current landscape, challenges, and potential opportunities. The varied perspectives and robust data collection methodology ensure a credible and thorough analysis of the local music ecosystem.

Findings

Musician Landscape

Based on the qualitative data, the Unama’ki – Cape Breton music community has a range of experience levels, multiple income streams, and diverse responsibilities, with both emerging and veteran musicians facing distinct challenges.

Demographics

The demographic analysis of Unama’ki – Cape Breton Island musicians provides critical insights into the composition and characteristics of the local music ecosystem. By examining the profile of musicians through survey data and qualitative interviews, this section seeks to illuminate the human landscape behind the island's rich musical heritage, offering a foundational understanding of who creates and sustains the region's musical traditions and contemporary scenes.

The survey of 120 Unama’ki – Cape Breton Island musicians showed:

How old are you?

Answered: 117 Skipped: 3

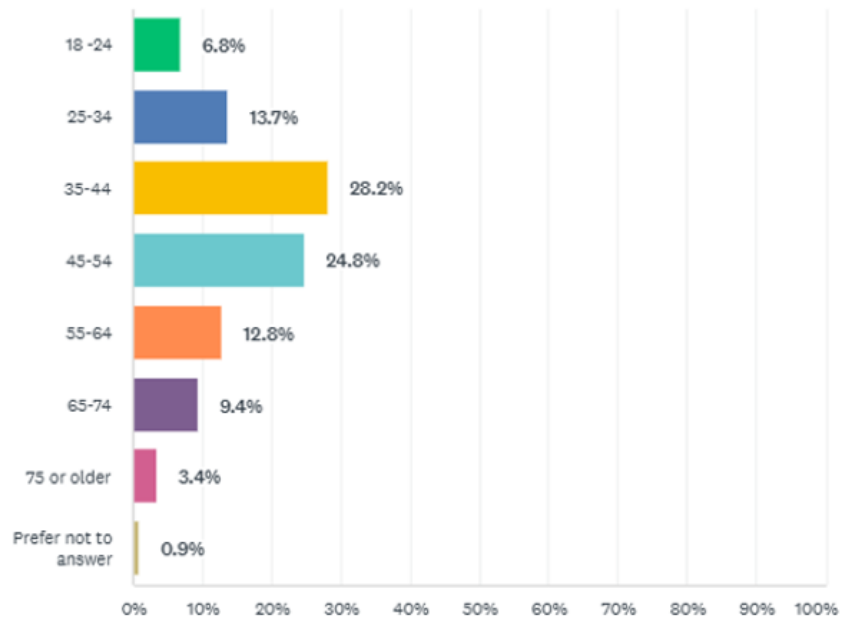


Figure 1- Age Breakdown of Unama’ki - Cape Breton Island Musicians

- **Age breakdown:** Largest groups were 35-44 (28.2%) and 45-54 (24.8%), with younger (18-24: 6.8%) and older (65-74: 9.4%, 75+: 3.4%) musicians also represented.
- **Gender composition (self-identified):** Mixed representation of male, female, and non-binary musicians. However, female performers only make up a quarter of the surveyed musicians.
- **Musical genres:** Wide range of traditional Unama’ki – Cape Breton styles alongside contemporary genres. Many musicians played multiple genres.

- **Professional status:** Mix of full-time (primary income from music) and part-time musicians. Many had supplementary non-music employment.
- **Length of Participation:** Almost half of survey participants have been involved in the Unama’ki – Cape Breton music industry for more than 25 years.

How long have you been a part of the Cape Breton Island music industry?

Answered: 115 Skipped: 5

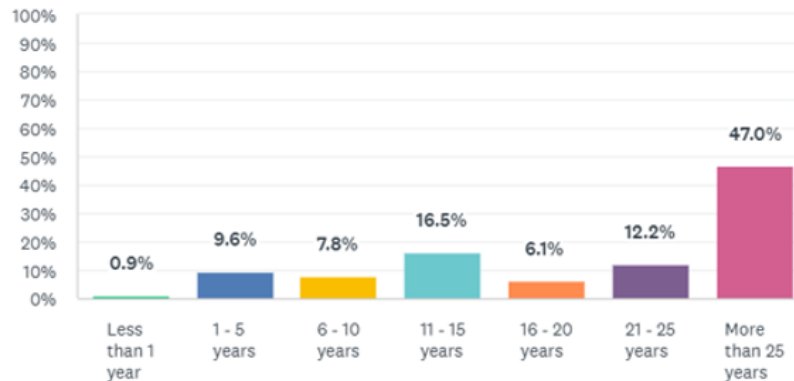


Figure 2 - Length in Music Industry

Income and Economic Realities for Unama’ki – Cape Breton Musicians

Financial challenges are the most pressing issue, including low pay for performances, difficulty accessing grants and funding, and the high cost of expanding audiences beyond local markets. Musicians often struggle to monetize their work effectively, and many cannot rely solely on music

Approximately how much did you make last year from music and music-related sources?

Answered: 115 Skipped: 5

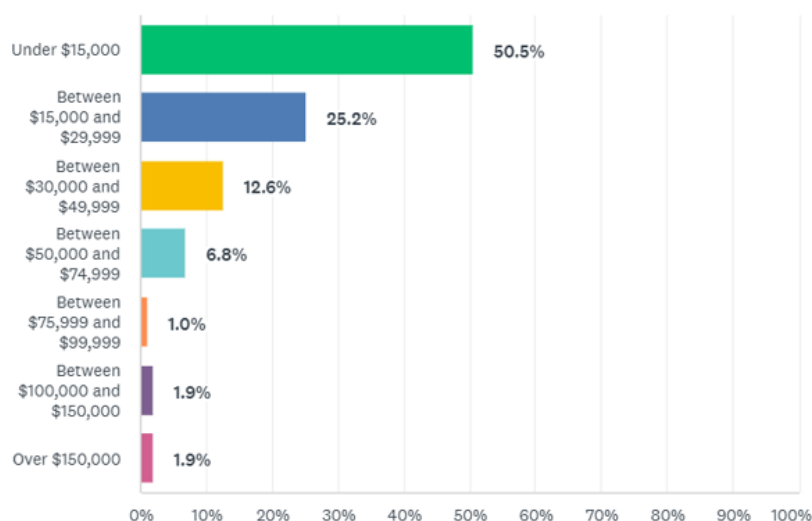


Figure 3 – Unama’ki – Cape Breton Island Musician Income

for their livelihood. For some, this is compounded by the need to self-finance albums or tours, with little prospect of substantial returns in the streaming era.

The financial realities of Unama’ki – Cape Breton musicians reveal a significant reliance on supplemental income and highlight the economic challenges within the industry. The largest share of surveyed musicians, over 50%, reported earning less than \$15,000 annually from music and music-related activities. This low income underscores the difficulty of sustaining a full-time career in music, with many individuals likely turning to secondary employment to make ends meet. A quarter of respondents reported earning between \$15,000 and \$29,999, and just over 12% earned between \$30,000 and \$49,999 annually. These mid-range income brackets suggest a subset of musicians achieving relative financial stability, potentially allowing them to focus more on their creative careers.

Higher income brackets, however, remain elusive for most musicians. Only 6.8% of respondents earned between \$50,000 and \$74,999, and less than 2% reported annual incomes exceeding \$100,000. These figures indicate that achieving a high income from music alone is rare, particularly for those in the early or mid-stages of their careers. The qualitative interviews reinforced this reality, with many musicians expressing frustration over low performance fees, inconsistent gig opportunities, and the challenges of monetizing their music in a digital-first landscape.

Approximately what percentage of your yearly income is from music and music-related sources?

Answered: 115 Skipped: 5

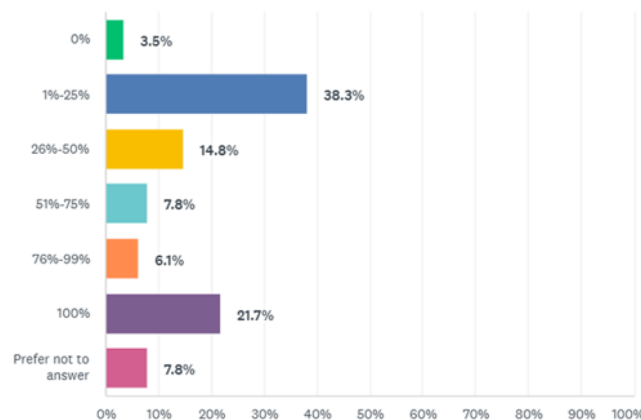


Figure 4 - Musician Income Reliance

These findings underscore the need for sustainable, industry-wide solutions to improve financial outcomes for local musicians. Expanding government support, such as grants or funding targeted at musicians, could alleviate some of the financial pressure. Similarly, developing more robust performance opportunities through collaborations with the tourism industry or increased festival offerings could provide critical exposure and income. For business owners and industry stakeholders, there is an opportunity to invest in resources that support musicians' professional development, such as marketing training or grant-writing workshops. By addressing these challenges, Unama’ki – Cape Breton's music scene could foster an environment where artists have the tools and opportunities to achieve greater financial stability and professional growth.

Logistical and Professional Challenges

The music ecosystem on Unama’ki – Cape Breton Island lacks sufficient support infrastructure. Musicians report a shortage of booking agents, live audio technicians, and music managers. These gaps create additional burdens, as musicians often juggle various roles, including booking, promotion, and technical responsibilities. Additionally, musicians mentioned barriers like the cliquish nature of local music scenes, a lack of rehearsal spaces, and limited opportunities for collaborations that further restrict growth. Indigenous artists specifically note challenges transitioning from supporting acts to mainstage roles, as well as a lack of representation and promotion of their culture.

Do you have a manager?

Answered: 114 Skipped: 6

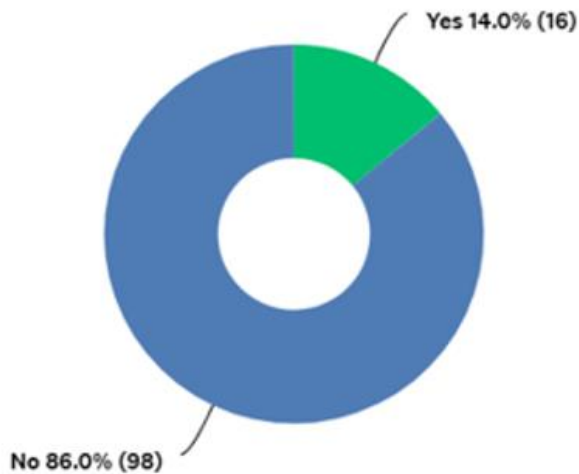


Figure 5 - Musician Management

Do you book your own gigs?

Answered: 115 Skipped: 5

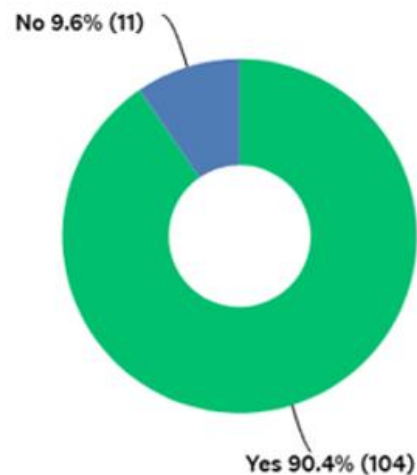


Figure 6 - Musician Bookings

Another pressing issue is the limited availability of venues and access to larger audiences. Many musicians find it challenging to break into new markets outside Unama’ki – Cape Breton, which restricts their potential to grow their fan base and revenue streams. While local audiences are often supportive, Unama’ki – Cape Breton musicians face logistical and promotional obstacles when attempting to perform in broader markets or reach more diverse audiences.

Additional Insights:

Respondents identified several barriers preventing growth and success in the industry:

- **Financial constraints:** Limited funding for for-profit initiatives, high costs of equipment, and rising labour expenses.
- **Workforce challenges:** Shortages of trained professionals and the difficulty of retaining skilled staff.
- **Seasonality and event limitations:** Quiet off-peak seasons hinder revenue stability and engagement opportunities.

- **Government support:** A perceived lack of local government investment and direct funding for music-based businesses.

These barriers align with challenges already identified, such as seasonal reliance and infrastructure deficits, but they also highlight critical gaps in public and private support.

Career Development Barriers

Transitioning from an emerging to an established artist is another notable challenge. Many musicians express frustration over the barriers to moving beyond a supporting role and establishing themselves as successful solo acts. For many, self-managing and promoting their careers are overwhelming tasks, especially with limited mentorship and guidance available. Younger musicians and those new to the industry struggle with business aspects, such as social media marketing, streaming management, and securing fair pay. There is also an absence of succession plans or training for essential industry roles, like sound technicians and stage managers.

Experienced musicians also point to issues such as cliquishness within the local music scene and the perceived devaluation of music which undermine collaboration and professional growth. These dynamics can limit opportunities for emerging artists to break into established circles and for seasoned musicians to innovate or expand their networks.

Devaluation of Music

The devaluation of music through free or underpaid performances is a recurring theme in the data. Musicians highlight how these practices not only hinder their income but also set low expectations for audiences and venues, making it harder for artists to charge fair rates. Suggestions for improving the valuation of live music include establishing minimum pay rates and implementing customer surcharges for venues hosting free performances.

Despite these challenges, there are some bright spots, such as the efforts of organizations like CBMIC, which provide mentorship and networking opportunities. However, expanding these programs and addressing systemic issues will be key to fostering a more sustainable music industry on Unama'ki – Cape Breton Island.

Music's Economic Impact on Local Communities

The music event attendee survey reveals a diverse audience composition, with both local residents, Canadians from outside Unama'ki – Cape Breton, and international travelers in attendance. Over 62% of surveyed attendees were from Unama'ki – Cape Breton Island itself, highlighting the strong local interest and engagement with the region's vibrant music scene.

For visitors to Unama'ki – Cape Breton, the island's music was a significant factor in their decision to travel, with over 52% indicating it was very or extremely important. However, an intriguing 25.5% of attendees from outside of the island said Unama'ki – Cape Breton's music was not so important or not at all important in bringing them to the region, despite the fact that they were surveyed while attending a music event. This suggests the island's music events are able to attract a broader base of tourists beyond those primarily motivated by the musical offerings, likely drawn by Unama'ki – Cape Breton's wider cultural, natural, and recreational attractions. The music events themselves then serve as complementary experiences incorporated into these visitors' trips.

How important was Cape Breton Island music in bringing you to Cape Breton?

Answered: 33 Skipped: 0

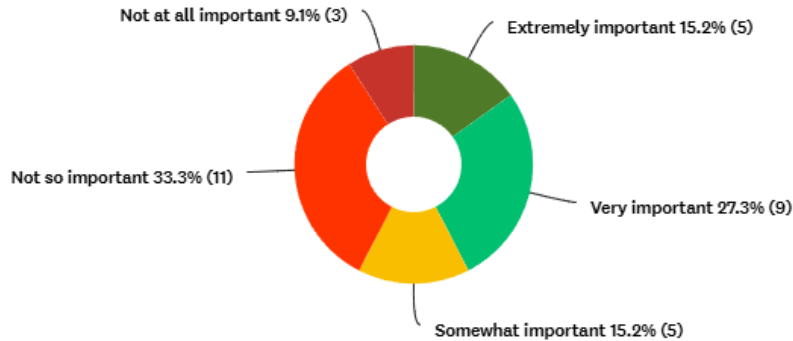


Figure 7 - Influence of Music on Travel Decisions for Visitors from Outside of Canada

Music serves as a significant motivator for many visitors to Unama’ki – Cape Breton Island, though its importance varies by origin. International visitors placed less emphasis on music as a reason to visit, with only 42.5% rating it as extremely or very important in their decision (Figure 7). Among visitors from Canada (excluding Cape Breton), this figure increases to 56.2%, reflecting a stronger connection to the island’s musical offerings. The highest levels of importance were reported by visitors from Atlantic Canada (excluding Cape Breton), with 68% indicating that Cape Breton Island’s music was extremely or very important in their decision to travel (Figure 8). These trends suggest that proximity to Cape Breton amplifies the importance of its music in travel decisions, underscoring its cultural significance within Atlantic Canada and among domestic audiences.

How important was Cape Breton Island music in bringing you to Cape Breton?

Answered: 25 Skipped: 0

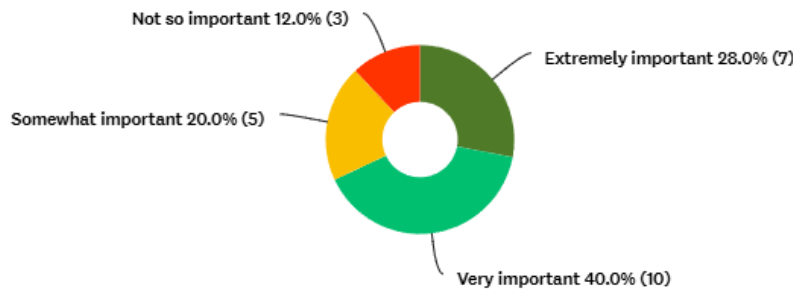


Figure 8 - Influence of Music on Travel Decisions for Visitors from Atlantic Canada

The Unama’ki – Cape Breton Island music industry offers a significant benefit by encouraging longer stays among visitors. Music event attendees from outside the island reported planning to spend an average of 11.8 days on Unama’ki – Cape Breton. Furthermore, among music event attendees from outside Unama’ki – Cape Breton, 53.6% intended to remain on the island for a week or longer. In comparison, a broader 2024 survey of 1,631 visitors to the island found that only 22.8% planned to stay for a week or more. This demonstrates that either music events play a pivotal role in extending

the length of visits for many off-island tourists, or visitors who are drawn to Unama’ki – Cape Breton Island for the music are likely to remain on the island for longer than other visitors. The extended stay duration of music event attendees enhances their economic impact on the local community.

Spending Patterns and Business Impacts

Music events on Unama’ki – Cape Breton Island are significant drivers of economic activity, benefiting both attendees and the local businesses near music venues. Insights from the **Music Event Attendee Survey** and the **Business Owners Near Venues Survey** demonstrate the interconnected nature of visitor spending and business growth, offering a comprehensive view of how these events contribute to the island's economy.

Would you likely remain on Cape Breton for longer if there were more opportunities to attend music events?

Answered: 97 Skipped: 164

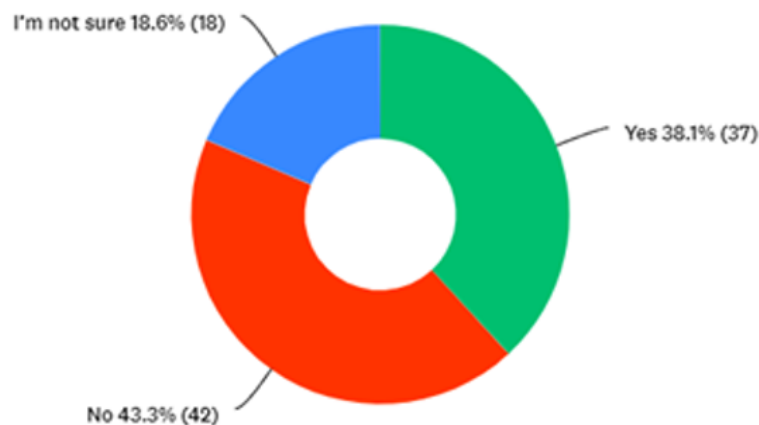


Figure 9 - Impact of Music Events on Length of Stay

Surveyed attendees reported notable spending patterns, with visitors from outside Unama’ki – Cape Breton contributing substantially more to the local economy than residents. Visitors from outside of Unama’ki – Cape Breton spent an average of CA\$179 per day in the community, excluding lodging and event admission compared to CA\$90 per day spent by locals. The fact that visitors to Unama’ki – Cape Breton Island who are attending music events spend twice as much per day as locals attending those same events underscores the outsized economic impact that visitors bring to music events. Furthermore, visitors reported planning stays averaging 11.8 days, with their cumulative spending translating into a significant financial boost for local businesses. Notably, 38% of visitors indicated that additional music events would likely extend their stay, highlighting a direct link between the frequency of events and their economic potential.

The perspective of business owners near music venues complements these findings. Nearly all surveyed businesses observed noticeable increases in revenue on event days, with some reporting boosts of 20–40% compared to non-event days. Restaurants, bars, and retail shops in particular experienced higher foot traffic, often requiring extended operating hours or additional staffing to meet demand. Beyond immediate financial gains, these events introduced businesses to new

customers, including out-of-town visitors, who often returned later in their stay, reinforcing the long-term benefits of music events for the local economy.

Do you notice an increase in revenue on days when there is a music event compared to days when there is not a music event?

Answered: 15 Skipped: 0

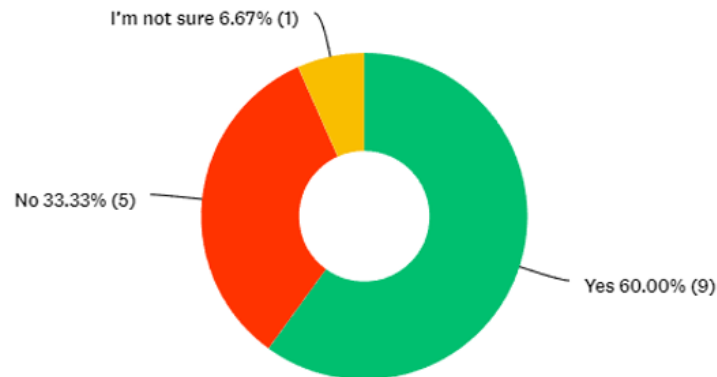


Figure 10 - Impact of Music Events on Business Revenue

The survey data reveals significant investments by businesses and stakeholders in the music industry, with figures ranging from CA\$0 to CA\$650,000 annually. A small number of high investors (e.g., CA\$350,000, CA\$500,000, CA\$650,000) illustrate the sector's potential for high returns and economic contributions. However, the disparity in total income (profit after expenses)—from CA\$0 to CA\$2.2 million—indicates that smaller entities often operate on narrow margins, limiting their capacity for growth and innovation. Salaries for music industry workers, including technicians and coordinators, also vary significantly, suggesting inequities in compensation that may exacerbate skill shortages.

Key Trends and Insights

1. Synergy Between Attendee Spending and Business Growth

The direct relationship between attendee spending and increased business revenue is clear. Visitors, in particular, bring a significant influx of spending to restaurants, shops, and other local establishments near music venues, showcasing how music events act as economic hubs.

2. Local and Visitor Dynamics

While locals provide year-round patronage, visitors create a critical economic spike during event-heavy periods. Their extended stays and higher spending habits make them essential to the success of businesses and music events alike.

3. The Multiplier Effect

Music events stimulate economic activity far beyond the venues themselves. Local businesses benefit from this multiplier effect, as attendee spending extends to other sectors, including dining, retail, and accommodation. This ripple effect amplifies the financial impact of hosting music events, particularly during off-peak tourism seasons.

Conclusions and Opportunities

Music events are a cornerstone of Unama'ki – Cape Breton Island's cultural identity and a key driver of economic growth. They not only attract visitors who spend more and stay longer but also create significant opportunities for local businesses. Restaurants, bars, and retail establishments near music venues reap direct financial benefits, while the broader community benefits from increased economic activity.

To maximize these advantages, expanding the number and variety of music events is essential, especially during shoulder seasons, when tourism is typically slower. Collaborations between music venues and local businesses could enhance the visitor experience through co-branded promotions or package deals. Additionally, targeted marketing efforts focusing on regional visitors could attract high-value attendees who are likely to engage deeply with the local economy.

This data highlights the significant tourism and economic impact that Unama'ki – Cape Breton's music events have, particularly in attracting visitors to the region and driving higher local spending. The attendance trends also suggest opportunities to further leverage music as a draw for tourism and potentially extend visitor stays through expanded event programming.

Unama'ki – Cape Breton has an opportunity to solidify its reputation as a music tourism destination while fostering stronger connections between music events and the local economy. By addressing these opportunities, the island can ensure that its vibrant music scene continues to deliver lasting cultural and economic benefits to the community.

Trends and Analysis

Insights from the Unama'ki – Cape Breton Island Music Industry Survey

The Unama'ki – Cape Breton Island Music Industry Survey was conducted with 25 business owners and operators of music-related businesses such as restaurants that offer live music, management organizations, technicians, and recording studios. These stakeholders in the local music industry offer valuable perspectives on the overall health of the music industry, its impact on businesses, and recommendations for strengthening the local music ecosystem. Questions in this survey focused on identifying trends in the music industry. The findings reflect both optimism and challenges faced by these businesses as they navigate a changing landscape.

How Business Owners View the Health of the Music Industry

A slight majority of respondents (58.3%) perceived the overall health of the Unama'ki – Cape Breton Island music industry to have **declined over the past two years**, while one-third noted an improvement. This sentiment was consistent across businesses of all sizes and ages. Larger businesses (those with 13 or more employees) were more likely to report downsizing music-related roles, while smaller businesses were more likely to have slightly expanded these positions. Despite concerns about the industry's trajectory, many business owners noted an increase in their engagement with musicians and artists, indicating that collaborations and partnerships remain active even amid challenges.

How do you feel the overall health of the Cape Breton Island music industry has changed over the past two years?

Answered: 24 Skipped: 1

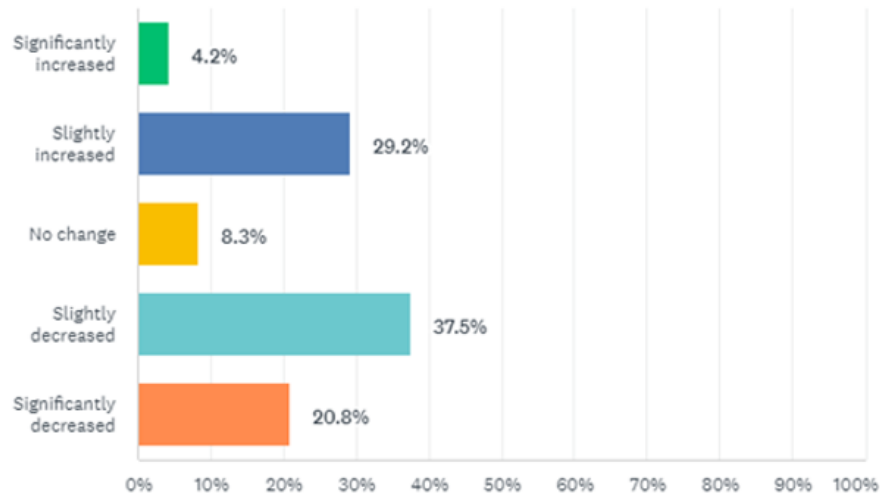


Figure 11 - General Music Industry Health

Economic Impacts of the Music Industry on Local Businesses

While the music industry serves as a significant driver of revenue for numerous businesses on Unama'ki – Cape Breton Island, it is often not the sole source of revenue for many. On average, respondents reported that 66% of their income was derived from music-related activities. However, of the 25 survey participants, only four indicated that all of their revenue was derived from music-related activities while 43% stated that 90% or more of their revenue came from this sector. Restaurants and pubs that provide live music or entertainment estimated that 24% of their income came from music-related activities. The dependency on music underscores the industry's critical role in sustaining local businesses, from venues and sound production companies to management agencies.

Larger businesses, however, faced more difficulties in maintaining profitability, with many citing rising costs and reductions in federal support as significant barriers. In contrast, smaller businesses were more likely to report increases in revenue and profitability over the past two years. This divergence suggests that smaller, more flexible businesses may be better positioned to adapt to evolving conditions, while larger enterprises struggle with higher operating costs and more substantial infrastructure challenges.

Barriers and Challenges

Business owners highlighted several barriers that impact the music industry's growth and their own operations:

1. **Funding and Financial Constraints**

Many respondents noted insufficient funding for "for-profit" businesses in the music sector. They expressed frustration that grants and subsidies often favour non-profits or free events,

which can negatively affect paid, ticketed events and the businesses organizing them. Rising operational costs, such as labour and equipment, also place strain on businesses.

2. Skilled Labour Shortages

A lack of qualified and experienced technicians, including sound engineers and production staff, was frequently mentioned as a challenge. Respondents emphasized the need for more training programs to develop a skilled workforce capable of supporting the industry.

3. Access to Audiences and Markets

Business owners expressed concerns about Unama'ki – Cape Breton's geographic isolation and the high costs of bringing music to wider audiences. The absence of established export channels for local music, coupled with an aging audience demographic, further complicates efforts to sustain and grow the industry.

4. Seasonality and Audience Demographics

Quiet shoulder seasons and the mass winter exodus of residents and visitors limit opportunities for year-round engagement. Additionally, some respondents noted a need to diversify audience demographics to attract younger listeners and larger crowds.

Opportunities

The survey data also highlighted some potential opportunities to strengthen the Unama'ki – Cape Breton Island music industry:

- 1. Increased Engagement with Artists:** There is an opportunity to leverage increased engagement with artists to enhance event offerings and attract more visitors. Businesses report growing interactions with artists over the past two years, which could be used to develop new collaborations and events
- 2. Expanding Music Events:** Given that more opportunities to attend music events could extend visitor stays on Unama'ki – Cape Breton Island, there is potential to expand event offerings to maximize economic impact from tourism
- 3. Support for Smaller Enterprises:** The growth in smaller businesses presents an opportunity to support these enterprises through targeted initiatives such as funding programs or marketing support, helping them capitalize on their agility and innovative approaches

Suggestions for Strengthening the Music Industry

Survey respondents provided actionable recommendations to bolster the Unama'ki – Cape Breton Island music industry:

- Expand Funding Opportunities:** Introduce more funding and sponsorship options for for-profit businesses to support infrastructure development, marketing, and talent recruitment. Balance funding between non-profits and for-profit entities to create a more equitable ecosystem.

- **Enhance Training Programs:** Develop education initiatives to train sound technicians, production staff, and other industry professionals. Programs aimed at attracting younger talent to the industry could address existing skill shortages while fostering innovation.
- **Facilitate Audience Development:** Invest in marketing Unama’ki – Cape Breton’s music to broader audiences, both nationally and internationally. This could include creating export channels for Unama’ki – Cape Breton musicians and promoting the island as a music tourism destination.
- **Encourage Collaboration:** Strengthen partnerships between businesses, venues, and artists to create synergistic opportunities. For example, co-branded promotions and event partnerships could increase engagement and profitability for all stakeholders.
- **Focus on Sustainability and Growth:** Address seasonality challenges by promoting year-round events and initiatives. Expanding winter music programming and leveraging festivals to draw in off-peak audiences could help stabilize revenues.

Cross-Survey Trend Identification

The five surveys—covering musicians, event attendees, local businesses near venues, and music industry operators—collectively paint a picture of a dynamic but challenged music ecosystem that generates significant economic and cultural value for the region. However, challenges related to financial constraints, infrastructure gaps, and seasonal reliance are common themes across stakeholders. These recurring themes emerge across the datasets, pointing to shared strengths, barriers, and opportunities for the Unama’ki – Cape Breton music industry.

Economic Significance of Music to the Local Economy

Music is a key economic driver for Unama’ki – Cape Breton Island, contributing significantly to local businesses, musicians, and the broader tourism industry. Attendees at music events, particularly visitors from outside the region, spend more than locals. Music event attendees originating from outside the island reported spending an average of \$179 per day in local communities, compared to \$90 for Unama’ki – Cape Breton residents. When paired with their extended stays, averaging 11.8 days, visitors contribute substantial revenue across sectors such as dining, retail, and accommodations. For businesses within the music industry, music-related activities represent an average of 66% of total revenue, with nearly half of businesses surveyed reporting that over 90% of their income depends on music. These findings underline the central role of music in sustaining the island’s economy, positioning it as not just a cultural asset but a significant economic one.

Financial and Operational Challenges Across Stakeholders

Financial difficulties are prevalent across the music ecosystem, affecting musicians, event organizers, and businesses alike. Many musicians struggle to achieve financial stability, citing low performance fees, limited funding opportunities, and the devaluation of live performances, particularly when free events set unrealistic audience expectations. 61% of Unama’ki – Cape Breton Island musicians derive less than half their yearly income from music. Businesses also face financial constraints, with rising operational costs for labour and equipment and an uneven funding landscape that often favours non-profits over for-profit enterprises. Investment data further underscores the need for targeted funding to address equipment and infrastructure gaps, such as

audio systems and rehearsal spaces, which are crucial for professionalizing the industry.

Approximately what percentage of your yearly income is from music and music-related sources?

Answered: 115 Skipped: 5

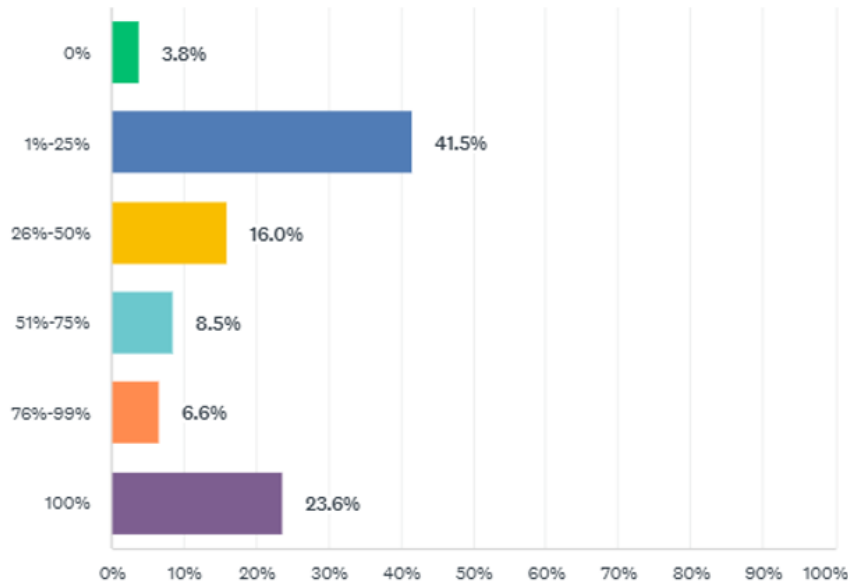


Figure 12 - Income from Music Related Sources

While some smaller businesses reported slight revenue increases, larger organizations noted more significant struggles to maintain profitability. This shared financial strain highlights the need for more equitable funding structures and sustainable financial models across the industry.

Workforce and Infrastructure Gaps

A lack of qualified personnel and adequate infrastructure has emerged as a significant barrier to growth. Musicians often take on multiple roles, acting as their own promoters, technicians, and managers, due to the scarcity of industry professionals such as booking agents, sound engineers, and music managers. Business owners also reported a shortage of skilled labour, particularly in technical roles critical to producing high-quality events. These workforce gaps not only burden musicians and businesses but also affect the audience experience, potentially diminishing the appeal of music events. Addressing these infrastructure and staffing challenges is essential to improving both the quality and scalability of Unama’ki – Cape Breton’s music scene. Salary disparities highlight a significant challenge in attracting and retaining skilled labour. Compensation for technical and managerial roles often falls short of competitive industry standards, contributing to shortages of sound technicians, event staff, and music managers.

Seasonal and Geographic Constraints

The Unama’ki – Cape Breton music industry faces significant challenges related to seasonality and geographic isolation. Many businesses noted quiet shoulder seasons and a winter slowdown, leading to reduced revenue and downsizing during off-peak months. Musicians echoed these concerns, highlighting the lack of year-round performance opportunities and the difficulty of maintaining stable careers in a seasonal market. Visitors, meanwhile, are concentrated during the

summer and early fall, with music events often serving as key attractions during this peak period. The reliance on seasonal activity underscores the need to expand programming during the winter and off-season months, both to stabilize revenues and to maintain consistent audience engagement throughout the year.

Strong Local Engagement but Limited External Reach

While local audiences are highly engaged in Unama'ki – Cape Breton's music scene, expanding beyond the island remains a significant challenge. Many musicians struggle to reach broader audiences due to limited resources for promotion and the high costs of travel. Similarly, business owners expressed concerns about the lack of established export channels for Unama'ki – Cape Breton music, which limits the industry's ability to gain national or international exposure. Despite this, visitors from outside the region indicated that Unama'ki – Cape Breton's music was an important motivator for their trips, suggesting untapped potential for marketing the island as a music destination. Bridging this gap will require strategic investments in export initiatives and collaborations to expand Unama'ki – Cape Breton's reach.

Collaborative Potential for Growth

Collaboration emerged as a recurring theme across surveys, with stakeholders recognizing the value of partnerships in overcoming shared challenges. Musicians frequently mentioned the need to work with venues and local businesses to create mutually beneficial opportunities. Business owners also acknowledged the importance of collaboration, particularly through co-branded promotions and partnerships that could attract larger audiences. Visitors expressed interest in attending additional music events, highlighting the potential for organizers and businesses to scale events to meet this demand. By fostering stronger connections between musicians, venues, and the wider business community, Unama'ki – Cape Breton can unlock new opportunities for growth and create a more resilient and dynamic music industry.

Strategic Recommendations

Drawing on insights from all five surveys, this set of strategic recommendations is tailored to the primary stakeholders who can drive meaningful change. Each recommendation is aligned with the roles, resources, and influence of specific stakeholder groups to create a collaborative path forward for the Unama'ki – Cape Breton Island music industry.

Current Business Owners

Businesses play a pivotal role in creating opportunities for musicians and attracting audiences. To maximize their impact, business owners should:

- **Enhance Event Partnerships:** Collaborate with musicians and event organizers to co-create experiences, such as bundled event and dining packages or co-branded promotions.
- **Invest in Quality Infrastructure:** Upgrade sound systems, seating, and amenities to improve audience experiences and attract repeat attendees. This will also help professionalize the perception of Unama'ki – Cape Breton venues.

- **Adopt Sustainable Pay Practices:** Work with musicians to establish fair pay rates that reflect the value of live performances, avoiding the devaluation caused by free or underpaid gigs.
- **Extend Operating Seasons:** Offer year-round programming or partner with other businesses to create seasonal promotions, reducing reliance on peak-season revenue.

Destination Cape Breton (DMO)

Destination Cape Breton is instrumental in marketing the island's music and tourism offerings to a broader audience. Strategic initiatives include:

- **Develop Unama'ki – Cape Breton Music Branding:** Position Unama'ki – Cape Breton as a premier music destination by integrating music events into wider tourism campaigns. Highlight unique cultural and musical experiences to attract domestic and international audiences.
- **Export Unama'ki – Cape Breton's Music:** Partner with national and international organizations to promote Unama'ki – Cape Breton artists at festivals, conferences, and events outside the island, showcasing the region's rich musical heritage.
- **Target Regional Visitors:** Focus on Canadian tourists, who are more likely to view Unama'ki – Cape Breton music as a motivator for travel, through targeted advertising and partnerships with nearby provinces.
- **Alleviate Seasonality Issues:** Develop incentives for venues and businesses to host off-peak events.

Investors

Investors have the opportunity to fund initiatives that strengthen the industry and generate economic returns. Potential areas for investment include:

- **Venue Development:** Invest in contemporary venues to attract larger audiences and high-profile performers. Multipurpose venues that can host concerts, festivals, and workshops will maximize return on investment.
- **Music Tourism Packages:** Collaborate with local businesses and Destination Cape Breton to create comprehensive tourism packages that integrate lodging, music events, activities, and cultural experiences.
- **Technological Infrastructure:** Support the development of digital platforms for ticketing, promotion, and music distribution, making it easier for musicians to connect with audiences and monetize their work.

Community Leaders

Community leaders can advocate for the cultural and economic value of music while fostering local engagement. Key recommendations include:

- **Support Local Engagement:** Organize community-driven events such as open mic nights, school performances, or festivals to deepen residents' connection to the music scene.

- **Mentorship Programs:** Partner with musicians and businesses to establish mentorship initiatives, helping younger artists navigate the industry and encouraging them to stay active in Unama’ki – Cape Breton.
- **Advocate for Music as a Cultural Priority:** Work with stakeholders to emphasize the importance of music to Unama’ki – Cape Breton’s cultural identity, ensuring it remains a priority in community development efforts.

Provincial Government Officials

Government officials are essential for providing the funding and policy framework to support the industry’s growth. Recommended actions include:

- **Expand Funding Opportunities:** Increase grants and financial support for both non-profits and for-profit businesses, addressing the funding disparity that hinders some sectors of the industry.
- **Develop Year-Round Programming Support:** Fund initiatives that encourage year-round music events, particularly during off-peak seasons, to stabilize the industry and reduce seasonal economic volatility.
- **Incentivize Infrastructure Investment:** Provide tax incentives or matching grants for businesses investing in music-related infrastructure, such as venues, sound equipment, and recording studios.
- **Facilitate Export Channels:** Establish programs to connect Unama’ki – Cape Breton musicians with national and international markets, enabling them to share their talent and heritage with broader audiences.

Non-Governmental Organizations (NGOs)

NGOs can serve as connectors, advocates, and providers of resources to the music industry.

Potential initiatives include:

- **Workforce Development Programs:** Launch training initiatives for sound technicians, event staff, and other skilled roles critical to the industry’s success.
- **Music Industry Networking Events:** Host conferences or workshops that bring together musicians, business owners, and promoters to share knowledge and build collaborations.
- **Support Social Inclusion:** Ensure diverse representation in music events, particularly for Indigenous, 2SLGBTQI+, and underrepresented artists, by creating platforms and funding dedicated to showcasing their work.

Musicians

As the core of the music ecosystem, musicians can take steps to strengthen their individual careers and contribute to the industry’s growth:

- **Collaborate Locally and Regionally:** Work with other musicians, venues, and businesses to create innovative events and projects that draw audiences and foster community support.

- **Leverage Digital Tools:** Use social media and streaming platforms to build broader audiences and monetize their work. Creating, publishing, and promoting professional-quality content can enhance their online presence and reach.
- **Advocate for Fair Pay:** Form associations or collectives to negotiate fair pay rates with venues and event organizers, ensuring consistent and equitable compensation across the industry.

Additional Stakeholders

While musicians, business owners, and event organizers are central to the success of the Unama’ki – Cape Breton Island music industry, a broader network of stakeholders plays an equally vital role in supporting and sustaining its growth. Educational institutions, arts and cultural organizations, Indigenous communities, hospitality and tourism partners, local media, technology providers, and even the audiences themselves each contribute unique expertise and resources. By engaging these additional stakeholders, the music industry can address systemic challenges, foster collaboration, and create a more resilient ecosystem. Their involvement not only enhances the cultural and economic vitality of Unama’ki – Cape Breton but also ensures the long-term sustainability and visibility of its music scene on a national and global scale.

Educational Institutions

Role: Training and nurturing future generations of musicians and industry professionals.

- **Why They Matter:** Schools, colleges, and universities can provide foundational music education, technical training, and industry mentorship programs to address skills shortages and foster a pipeline of talent.
- **Key Contributions:**
 - Develop music programs focusing on performance, production, and business skills.
 - Partner with industry professionals to create internships, mentorships, or work placements for students.
 - Promote youth engagement in music through community outreach and school partnerships.
 - Create scholarships for technical training to encourage new talent.

Arts and Cultural Organizations

Role: Advocating for and funding cultural initiatives while supporting collaborative efforts within the arts community.

- **Why They Matter:** These organizations often act as liaisons between musicians, businesses, and policymakers and can secure funding or grants for the industry.
- **Key Contributions:**
 - Organize multi-disciplinary events that integrate music with other art forms (e.g., dance, theater, visual arts).

- Facilitate networking opportunities between musicians, businesses, and other creatives.
- Provide resources such as grant-writing support or access to performance spaces.

Indigenous Communities and Organizations

Role: Preserving and promoting Indigenous music and cultural heritage as part of Unama’ki – Cape Breton’s identity.

- **Why They Matter:** Indigenous musicians and cultural experiences represent a vital and unique aspect of Unama’ki – Cape Breton’s music industry, offering opportunities for inclusion, collaboration, and cultural tourism.
- **Key Contributions:**
 - Develop Indigenous-led music events and festivals to highlight Mi’kmaq culture.
 - Advocate for funding and support specifically aimed at Indigenous artists and music organizations.
 - Promote collaboration between Indigenous and non-Indigenous musicians to create culturally rich performances.

Hospitality and Tourism Industry Partners

Role: Capitalizing on the synergy between music events and visitor spending.

- **Why They Matter:** Hotels, restaurants, and tour operators benefit directly from increased tourism tied to music events and can amplify the impact through partnerships.
- **Key Contributions:**
 - Collaborate with event organizers to create packages (e.g., accommodation + event tickets).
 - Promote music events to guests as part of a broader Unama’ki – Cape Breton experience.
 - Provide sponsorships or in-kind support (e.g., accommodations for performers).

Local Media and Press

Role: Raising awareness of music events and promoting the Unama’ki – Cape Breton music scene to broader audiences.

- **Why They Matter:** Effective media coverage and storytelling can attract more attendees and amplify the island’s reputation as a music destination.
- **Key Contributions:**
 - Partner with musicians and event organizers to spotlight local talent.
 - Produce features, interviews, and reviews that elevate Unama’ki – Cape Breton’s music industry.

- Collaborate on advertising campaigns to promote events beyond the island.

Technology Providers

Role: Offering tools and platforms to help musicians and businesses modernize and expand their reach.

- **Why They Matter:** Digital tools can help streamline operations, increase visibility, and generate new revenue streams for musicians and event organizers.
- **Key Contributions:**
 - Develop ticketing and event management platforms tailored to Unama’ki – Cape Breton’s needs.
 - Provide training on using social media, streaming platforms, and music distribution services.
 - Explore innovative applications, such as virtual concerts, to engage remote audiences.

Audience Members and Fans

Role: Driving demand and sustaining the music ecosystem.

- **Why They Matter:** Engaged audiences are the lifeblood of the industry, providing financial and emotional support for artists and events.
- **Key Contributions:**
 - Advocate for local music through attendance, promotion, and financial support (e.g., merchandise and crowdfunding).
 - Participate in feedback surveys to help shape future events.
 - Engage with musicians on social media to amplify their reach and visibility.

Integrating These Stakeholders

Incorporating these additional stakeholders into existing strategies would create a more interconnected ecosystem. For example, collaborations between educational institutions, arts organizations, and Indigenous communities could foster talent while preserving cultural heritage. Similarly, partnerships with the hospitality industry and local media can amplify event promotion and maximize economic benefits.

Strengthening the Unama’ki – Cape Breton Island music industry requires coordinated efforts across all stakeholder groups. By leveraging their unique roles and resources, these stakeholders can address the industry’s challenges, such as financial instability, infrastructure gaps, and seasonal reliance.

Conclusion

The Unama’ki – Cape Breton Island music industry is a vibrant cultural and economic asset, deeply rooted in the island’s identity and traditions. However, the research highlights a number of challenges that must be addressed to ensure its sustainability and growth. Financial constraints, limited infrastructure, workforce shortages, and seasonal reliance affect musicians, businesses, and event organizers alike, creating barriers to long-term success. Despite these challenges, the sector holds immense potential for expansion, innovation, and collaboration.

Through targeted actions by key stakeholders—including musicians, business owners, government officials, educational institutions, and community leaders—the Unama’ki – Cape Breton music industry can be transformed into a stronger, more resilient ecosystem. Expanding funding opportunities, fostering year-round programming, building export channels, and leveraging collaboration across sectors are just some of the strategies that can help the industry thrive.

By uniting the efforts of all stakeholders and drawing on the rich cultural heritage of Unama’ki – Cape Breton, the music sector can continue to serve as a cornerstone of the island’s economy, while enriching the lives of residents and attracting audiences from across the globe. This report provides a roadmap for achieving these goals and invites stakeholders to take collective action in shaping the future of music on Unama’ki – Cape Breton Island.