

Vision for Ontario's Live Music Industry





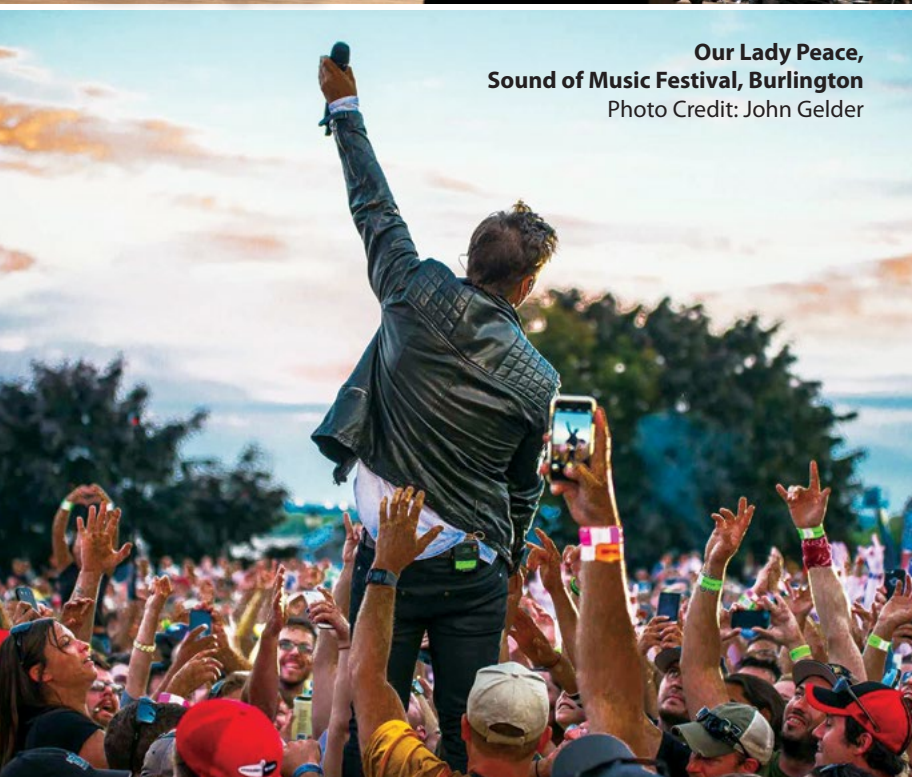
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Front Cover
Dala
Inside Cover
Reuben and the Dark

Introduction



Jazz at Lincoln Centre Orchestra with Wynton Marsalis,
Roy Thomson Hall, Toronto
Photo Credit: Jag Gundu



Our Lady Peace,
Sound of Music Festival, Burlington
Photo Credit: John Gelder



Bar Robo, Ottawa
Photo Credit: Els Dumsford

This document is a product of the Ontario Live Music Working Group, a unique collaboration of the live music presenting industry – including promoters, presenters, managers, industry associations, and agents – with support from the Ontario Ministry of Tourism, Culture and Sport. It is addressed to industry peers and partners across Ontario's live music sector.

Live music is thriving in Ontario¹. It resonates throughout every community, from small town venues to blockbuster stadium events. It gives voice to a diverse array of communities and cultures, through a multitude of musical genres. Enjoyment of live music is one of the most common and popular forms of entertainment for Ontarians and visitors alike.

In an age of instant digital entertainment, where virtually any music recording ever created can be played by anyone with a connected device, live music still creates a shared experience and unique connection between the audience and performer.

Professionals working in the industry – artists, managers, presenters, promoters, agents, venue operators, music organizations and others – have made Ontario a leading centre for live music, both on the national and international stage. Through mutual co-operation and dialogue we have advanced the capacity and quality of live music offerings. Now our sector is ready for the next step: a shared vision to guide its continued development and position the industry for further growth.

The *Vision for Ontario's Live Music Industry* is an industry-led approach for the continued growth of our live music community. It identifies high-potential shared industry actions, and encourages the sharing of best practices by highlighting areas of mutual interest and fostering stronger industry collaboration. This *Vision* also identifies principles and priorities to inform future government policy for live music in Ontario, including the development of the Ontario Live Music Strategy. Taken together, this *Vision* is intended to benefit every person and organization working in the live music community, as well as the millions of Ontarians and visitors to the province who attend live music events every year.

¹ A definition of "live music" for the purpose of this *Vision* can be found in the Appendix.

Introduction

A key goal of this *Vision* is to raise awareness of our sector's 'story.' To do so, we need to spur two ongoing and simultaneous conversations: one within the industry, and the other with our partners and communities. The external conversation is about measuring and promoting our economic, social and cultural impacts to demonstrate the value and power of live music to government, the private sector and to Ontarians. We will accomplish this through collective research and advocacy. The internal conversation, critical to the success of our industry at large, is about how we can effectively work together, responding to our common needs, building trust, and agreeing that we are stronger together. Identifying and committing to common goals, be they business-oriented or otherwise, is critical for long-term growth of our live music sector.

Our aim is to ensure Ontario's live music industry is best positioned to succeed and grow at this critical juncture in its development. With your help, this *Vision for Ontario's Live Music Industry* will fuel the energy, knowledge, capacity and potential of our sector, and that of the dedicated professionals working in it, for an even stronger and more dynamic Ontario live music sector.

How we got here

At no time in the history of live music in Ontario has the community been more ready and able to unite and leverage its collective influence. Live music is a crucial component of any artist's career, both as a revenue stream and as an audience development tool. Participants in the live music sector assume constant financial and artistic risk, develop artists, cultivate audiences, invest in innovation, maintain and build infrastructure, employ tens of thousands of Ontarians,² and contribute to the cultural, social and economic fabric of the province. This is a monumental opportunity to facilitate growth, development and further evolution of Ontario's live music sector.

Recognizing the growing importance and potential of the live music sector, the Ontario Live Music Working Group (LMWG) was created in January 2013 as a new and unprecedented forum for collaboration between industry and government. Its goals are to ensure our sector is consulted by

² *Live Music Measures Up: An Economic Impact Assessment of Live Music in Ontario*, Music Canada, Nordicity, 2015.



Introduction



Weezer, Sound of Music Festival, Burlington
Photo courtesy of: Sound of Music Festival



policy makers, to support industry research and policy development, and to develop strategies for expanding the range and impact of our industry in Ontario.

The LMWG includes representatives from across the live music industry and government. It is co-chaired by Erin Benjamin, who is widely recognized for her strong vision for the live music sector and currently serves as Executive Director of Music Canada Live, the first association created specifically to represent the interests of the live music industry. Her co-chair is a senior public servant from the Ministry of Tourism, Culture and Sport, Kevin Finnerty. The membership of the LMWG is drawn from music associations, concert promoters, venue owners, managers, agents, festival organizers, and three Ontario government agencies: the Ontario Media Development Corporation, the Ontario Arts Council and Destination Ontario.

The LMWG was formed to support the development of this *Vision for Ontario's Live Music Industry*, which will ultimately serve to inform the development of an Ontario Live Music Strategy. To lead the development of the *Vision*, a sub-committee of the LMWG, the Live Music Task Team, was established. The Task Team developed a discussion paper and online survey and conducted an industry-focused consultation to gather input on the priorities, opportunities, and issues facing Ontario's live music sector. This was supported by significant research and information gathering, including how other sub-national, municipal and federal jurisdictions, both domestic and international, are responding to similar trends.

The discussion paper and survey were distributed to over 100 individuals and organizations that are active participants in the province's live music industry. They included festival and venue operators, presenters, promoters, artists, artist managers, agents, as well as leaders of music associations. Many of the individuals had experience working in multiple roles, as is common in the live music industry. The Task Team received input from people in every region of the province, from the grassroots to major live music organizations.

We are delighted to share this *Vision for Ontario's Live Music Industry* with you. We hope you see yourself in this *Vision*, and we encourage you to actively participate in its realization.

Local Music Scenes



Cockatoo, The Painted Lady, Toronto
Photo Credit: Conor McSweeney



Strengthening opportunities for live music businesses and performing artists

Live music events are staged in communities large and small in every region of Ontario. They range from local music festivals to those with an out-of-province and international draw, and include concerts in a wide range of venues, from small clubs to stadiums. Toronto is the single largest market, but Ontario's live music sector is made up of a series of music scenes of varying sizes, each of which are vital to the overall health and growth of the provincial industry. Smaller scenes often play an integral role in artist development, and have their own unique strengths and needs, yet face many of the same challenges and opportunities as larger music scenes.

Collaborating to create music-friendly policies

According to Music Canada's *The Mastering of a Music City* report, released in summer 2015, music-friendly policies "encourage the growth of music creation, performance and recording, and attract and retain creative people. On the other hand, obstructive government policies make it difficult or impossible for music to be created, performed or celebrated, and can lead to an out-migration of artist-entrepreneurs."

Developing music-friendly policies and addressing issues such as noise complaints and rising property tax rates are priorities that were raised by many respondents to our consultation. These issues affect local live music scenes across the province, in big cities and small communities, and they have a direct impact on the ability of music venues

and other presenters to make live music happen.

If left unresolved, these issues can lead to venues closing, prevent new ones from opening, and discourage existing venues from expanding their operations. Collaboration between venues and communities – and industry and government – can help find solutions, but live music professionals must feel empowered and inspired to take leadership on these issues

For example, the Toronto Music Industry Advisory Council (TMAC) has been working with the City of Toronto to improve supports for live music venues, change zoning and licensing by-laws, improve access to parking for tour buses, and review rules about performances in city parks and other outdoor areas. This kind of collaboration has also occurred in other "Music Cities"³ across Ontario,

³ Music Cities are defined as places with vibrant, dynamic music scenes.

Local Music Scenes



The Strumbellas, Supercrawl, Hamilton
Photo Credit: Colette Schotsman

such as Ottawa and London. Municipal planning should take into account factors such as the adequacy of transportation and affordability of housing for artists.

Forums for industry professionals to come together, share information, and partner in advocacy are a core need. Respondents also expressed a strong desire for clearly stated policies that are applied consistently across different places and different genres of music, as well as more open communication with government.

Bringing live music to new audiences

For live music venues, festivals, promoters, presenters, and artists, developing new audiences is critical to commercial success.

The 2015 report *Live Music Measures Up: An Economic Analysis of Live Music in Ontario*, released by Music Canada with support from the Ontario Media Development Corporation (OMDC), describes how

Ontario's live music industry is struggling to build and maintain audiences in an era of increased competition. Live music events are not only competing with each other for audiences, but with popular new digital forms of leisure and entertainment.

Tapping into Ontario's cultural diversity by expanding the range of genres on offer and promoted in the province is one way to accomplish this. The majority of live music companies in Ontario operate in the realm of popular music (75 percent), according to the *Live Music Measures Up* report, but some (32 percent) are also active in more than one genre.

Many consultation respondents suggested that offering a greater diversity of genres would stimulate audience demand, with hip hop cited as a notable example. Respondents suggested that addressing the gaps in certain genres may require the development of greater industry expertise among those who work in those genres,

and greater representation at industry leadership levels.

Ontario is also home to a vibrant French-language music sector, which is a competitive advantage and an opportunity to find and grow audiences. This integral part of the sector is supported by organizations such as the Association des professionnels de la chanson et de la musique (APCM), which promotes francophone artists and disseminates francophone cultural products across Ontario.

Addressing gaps in the market

A key barrier to provincial music sector growth continues to be the lack of mid-sized live music venues. For example, the 2015 *Connecting Ottawa Music* report identifies the lack of venues with a capacity between 300 and 600 people as a weakness in that market. It forces local

Local Music Scenes

A Tribe Called Red (Hoop Dancer: James Jones), Westfest, Ottawa
Photo Credit: Brian Goldschmied



musicians, who would otherwise play for audiences of that size, to go elsewhere to perform. This lack of mid-sized venues was cited by several consultation respondents in communities across the province.

Better collaboration could improve the ability of artists to tour and perform across Ontario. For example, industry dialogue on developing more nuanced radius clauses could allow for artists to perform in smaller markets in addition to larger venues or festivals in the same region.

There is an underserved demand for all-ages music shows in Ontario. This has been identified as a priority for the industry (and will be discussed further in the “Industry Infrastructure” section). Critically, all-ages shows enrich the lives of young people, build engaged audiences for the future, and provide

established artists with more performance opportunities, while also allowing emerging artists and live industry professionals to hone their skills.

Supporting grassroots music presentation

Innovation in live music presentation at the grassroots level, often in the form of Do It Yourself (DIY) shows and venues—which occur in non-traditional spaces like warehouses, art galleries, or living rooms—could represent an important growth opportunity for the sector if consensus can be found on expectations for such events.

Grassroots presenters are often able to be more innovative, nimble and flexible than traditional presenters.⁴ Unlike a traditional music venue like a bar or club, grassroots

venues tend to be less constrained by the need for bar and alcohol sales. Some grassroots presenters have adopted social enterprise business models and operate with a social justice mandate, often working with artists from marginalized or underrepresented communities.

While gaining recognition, DIY venues face specific challenges stemming primarily from a lack of understanding about what they are and what they do. They are spaces that were, generally, never intended to be music venues. While they don’t face all the same challenges as traditional venues, they do face similar challenges of capacity, crowd and noise control, and safety. Regulators struggle with these matters in non-traditional spaces.

⁴ “Why DIY spaces matter,” Benjamin Boles, Now Magazine, January 30, 2017.

Available at: <https://nowtoronto.com/music/features/why-diy-spaces-in-toronto-matter/>

Local Music Scenes



Marty Baller on stage with A\$AP Ferg, Ottawa Blues Fest
Photo Credit: Steve Gerecke



Nagatu Shachu, Fleck Dance Theatre, Harbourfront Centre, Toronto
Photo courtesy of: Nagata Shachu



The Royal Conservatory of Music's Koerner Hall Photo Credit: Koerner Hall

For example, the Grickle Grass Festival, which takes place in the London Regional Children's Museum, combines a day of family-friendly activities with a night of live music on stages set up throughout the museum. According to Savanah Sewell, the festival's co-founder, "Music Cities start at the grassroots. We are activating these buildings, but there is a disconnect between what we are doing and what is traditionally considered the 'music industry.'"

Several consultation respondents suggested that a more formal network of grassroots presenters, through which these entrepreneurs could share resources and expertise, could help this part of the live music community grow.

Recommendations

1. Identify and facilitate strategic relationships between government and live music presenters to address policy barriers and grow live music presentation.
2. Encourage partnership and mentoring between promoters of large and small events, established and emerging music businesses, and different genres, to support cross-development of local music scenes.
3. Raise awareness within the live music industry and among regulators about DIY music presentation, and work to ensure that such spaces are able to thrive in a safe and secure way.
4. Build greater awareness and strengthen the voice of grassroots music presenters with regard to existing programs and supports, both government and industry-based.

Professional Capacity

Gully Bop, JAMBANA One World Festival, Markham
Photo courtesy of: JAMBANA One World Festival



Responding to the needs of live music professionals and expanding the availability of training opportunities

Skills development, training, sharing of best practices, business development and succession planning are all vital to the success of the live music industry. The industry consists of a diverse set of people from a wide variety of backgrounds, performing an assortment of tasks that often require disparate skillsets. The training and skill development needs of the sector range from logistics and planning, to project management, networking, contracting and more. However, formal training opportunities are not equitably accessible across the province, informal training opportunities are not comprehensive, and panels and workshops are complicated by geography, inadequate resources and high turnover among emerging industry professionals.

Many, if not most, live music professionals are innately entrepreneurial, doing and learning as they go. Similarly, dedicated volunteers in the sector often become the live music professionals of tomorrow. They are an impressive and unique dimension of the live music sector but designing training offerings for the volunteer segment can be challenging.

Numerous consultation respondents noted an inequitable level of representation of women in jobs across the live music industry. They also emphasized a need to sensitize live music professionals to the fact that music events and venues must be appropriately accommodating, hospitable and secure for female patrons. Additionally, of course, the industry should strive to be inclusive of the diversity of Ontario

by accommodating people of all ages, those with disabilities, cultural and racial minorities, as well as the LGBTQ+ community, to ensure they can participate fully in live music events.

The *Vision* for Ontario's Live Music Industry aims to increase the understanding of these matters, and the ability to address them, among live music professionals and volunteers across the province. It also aims to identify common professional capacity gaps and priorities and lay the groundwork to address them.

Access to tools and training

Participants in the live music industry report that the industry does not have adequate access to the tools and training

Professional Capacity

Massey Hall, Toronto
Photo Credit: Mitch Fillion



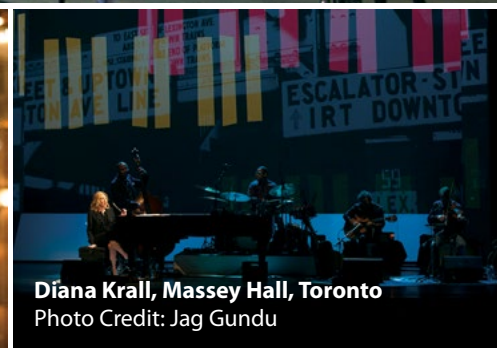
Melissa Etheridge, Danforth Music Hall, Toronto
Photo Credit: Canadian Music Week



Brooklyn Doran and Dan Hosh, The Dakota Tavern, Toronto
Photo Credit: Conor McSweeney



Diana Krall, Massey Hall, Toronto
Photo Credit: Jag Gundu



they need to do their jobs better, specifically with regard to business skills training. There is also a lack of documented and agreed upon best practices in the sector.

While more sustained and productive industry collaboration is one way to share experience, expertise and common best practices, developing meaningful collaboration across the sector will be a significant challenge. As one consultation respondent said, "This is a highly risky industry, most often afforded through personal investment. It's important to keep this in mind when bringing people together.

Recommendations

1. Investigate the possibility of an online business resource centre, capitalizing on Ontario live music success stories, to provide tools to live music professionals and help them access industry best practices.
2. Prioritize, identify, and develop opportunities for industry collaboration, and engage the sector in meaningful dialogue about strengthening its professional capacity.
3. Identify opportunities to strengthen training via dialogue with associations and training institutions.

Promotion and Marketing

Yao, National Arts Centre, Ottawa

Photo Credit: Joël Ducharme



Creative ways to build audiences across Ontario's live music sector

Audience development is critical to the long-term success of the live music sector. Performers depend on receptive and engaged audiences to come out and attend their shows; promoters and venue owners depend on them to purchase tickets or pay cover charges. Finding ways to build and renew audiences, especially through effective promotion and marketing of Ontario's diverse music scenes, is a concern for all in the live music industry.

There is a sense within the industry and beyond that Ontario's sector is an underdeveloped resource with huge potential for greater economic, social, and cultural impacts. Live music can, and should, increasingly partner with cities, tourism organizations, and other industry sectors to attract audiences and tourists.

Understanding audiences

Our consultation revealed that presenters and promoters in Ontario generally have a good understanding of their audiences and potential new markets. This can be attributed in large part to unprecedented access to social media as a marketing tool, and to the metrics that accompany these tools. However, respondents to our consultation reported there is still a desire for more comprehensive data (further discussed below in the "Impact Measurement" section) and that not all promoters or presenters are using the tools available. Smaller operations, specifically, may lack the capacity to effectively utilize data even when the resources are known and available to them.

According to our survey, emerging promoters sometimes struggle with understanding what sponsors and advertisers, a key component of their business directly linked to growth, want.

At the same time, francophone music presenters—those that program events entirely in the French language—are often in smaller and more rural communities and are less inclined to take risks with programming. They are more likely to book established acts and not experiment with new genres. The difficulty of gathering and accessing data on francophone audience preferences exacerbates this problem, which can ultimately deprive new genres of audiences and opportunities in these communities.

Promotion and Marketing

The PepTides, Westboro FUSE Festival, Ottawa
Photo Credit: Andre R. Gagne



Building effective partnerships

Partnerships with cities, tourism organizations, and other industries can be an effective way to market and promote live music. The role of live music as an important draw for visitors is being increasingly studied. A 2013 report from the Ontario Arts Council, the *Ontario Arts and Culture Tourism Profile*, found that arts and culture tourists spend more and stay longer than other kinds of tourists.

There is, however, limited awareness among both the tourism and live music sectors of the mutual opportunities posed by partnership. Many respondents to our consultation also noted that connecting with tourism organizations or businesses is significantly more challenging for

smaller organizations, and those in rural communities.

Building these partnerships is an important priority for the sector, and professional development opportunities, such as Canadian Music Week, could be leveraged to respond to this need. Industry organizations, such as Music Canada Live, could also support this goal by offering tools or resources that respond to the needs of the industry, such as:

- The Canadian Live Music Industry Awards;
- Trade delegations to music festivals and nearby markets; and
- Facilitating stronger relationships with tourism organizations, such as Destination Ontario.

The Ontario Live Music Portal

As a comprehensive live music listing website, the Ontario Live Music Portal (ontariolivemusic.ca) is potentially a key resource for activating the *Vision for Ontario's Live Music Industry*. It features listings in every region of the province, and in communities both large and small. The Portal serves as a one-stop source for live music offerings anywhere in the province, for domestic consumers and visitors alike. The Portal's listings are populated by aggregated data feeds, submissions from independent live music presenters, and the performers themselves.

Promotion and Marketing

CityFolk, Ottawa

Photo Credit: Steve Gerecke



The Beaches, Horseshoe Tavern, Toronto

Photo Credit: Canadian Music Week



Recommendations

1. Encourage the development and sharing of best practices in gathering and utilizing audience data.
2. Support information sharing and relationship building between the live music industry and the tourism and hospitality industry to promote Ontario as a premier live music destination.
3. Explore the possibility of reciprocal agreements between Ontario, Quebec and other Canadian markets to reduce barriers to accessing their respective francophone live music markets.
4. Develop a coordinated approach to promoting Ontario's live music to highlight the province as a premier music destination.
5. Prioritize the sustainability and growth of the Ontario Live Music Portal by developing stronger links with tourism agencies and organizations, and pursuing other measures to support the Portal.

The Portal represents an excellent potential resource for industry, listing nearly ten thousand events in any given year, but ultimately requires wider recognition and dedicated resources for growth. It could also be a powerful tool for reaching the millions of visitors to Ontario every year, allowing them to plan their visit around, or enhance their visit through, live music experiences.

Regulatory Factors and Government Coordination



Addressing regulation, public policy, and coordination across departments and levels of government

An important aspect of this *Vision* is the creation of a more positive landscape for live music in Ontario by developing stronger relationships with the government and non-government bodies that set policy and regulation, or are key influencers in that process.

Regulatory challenges

There are numerous important regulatory and policy matters that could be addressed through advocacy at all levels of government over the short, medium and long-term, in order to create a landscape that is more favourable to live music presentation.

The interpretation of Alcohol and Gaming Commission of Ontario (AGCO) regulations, and their application by police agencies, is uneven and lacking in transparency, both between and within

regions across the province, and by genre of music. Inadequate communication between municipal and provincial regulators compounds the problem. The result is a patchwork quilt of requirements for festivals and events, with some facing overly burdensome, and even cost prohibitive hurdles. Balanced regulation, fairly applied in a transparent manner and with reasonable opportunities for redress, is needed for the development of sustainable live music festivals and events across the province.

Similarly, there is a lack of transparency and perceived unfairness in regard to the level of security required for live music festivals and events. These requirements are determined by police agencies. Police agencies also decide the number of off-duty police officers that must be hired from among their ranks (at a non-negotiable cost per hour) to comply with

the requirements they set. This dynamic restricts the ability of live music festivals and events to develop strategies to manage their security costs.

Municipal zoning, as well as noise and sound by-laws, often pose insurmountable barriers to presenting live music, both at outdoor and indoor venues. It is important to ensure that by-laws are balanced so they address the interests of those who may be affected by live music presentations in their neighbourhoods, without imposing undue restrictions on presenters.

Property taxes based on assessed value are making it harder to sustain live music venues in areas where property values are high and rising. As a result, and in larger urban communities in particular, venue rents have risen to the point where they are becoming unviable to the

Regulatory Factors and Government Coordination



Quique Escamilla

Amy Helm, CityFolk, Ottawa
Photo Credit: W.P. McElligott



business model for live music. Similarly, the opportunity cost to venue owners/presenters has become so high that it is becoming increasingly hard to justify the continued use of real estate for live music purposes.

Government coordination

Respondents to our consultation called for improved coordination between government bodies to reduce unintended consequences.

For example, the legalization and regulation of cannabis scheduled to come into effect in summer 2018 may create challenges for live music presenters in Ontario. Uncertainty over how the new legal framework will be implemented is giving rise to concerns that enforcement may result in a rise in cannabis-related incidents at live music events.

The *Strengthening Protection for Ontario Consumers Act, 2017* includes a cap on the resale price of tickets at 50 per cent above face value, and requires businesses

selling or reselling tickets to disclose key information to consumers. The resale price cap challenges the business model for some high demand live music events. Industry and government should work together to monitor the impacts of this legislation.

Barriers to Canadian musicians performing in the United States or other countries impede the growth of our live music sector and artists' careers. This *Vision* supports the efforts of organizations working to improve the environment for Canada's musical artists in markets outside of Canada. This includes the work of the Canadian Independent Music Association in lobbying for reciprocal treatment in obtaining touring work visas, and for better treatment in regard to withholding taxes.

Collaboration and advocacy

Paramount to realizing the full potential of the live music sector is working together to advocate strongly for better regulatory

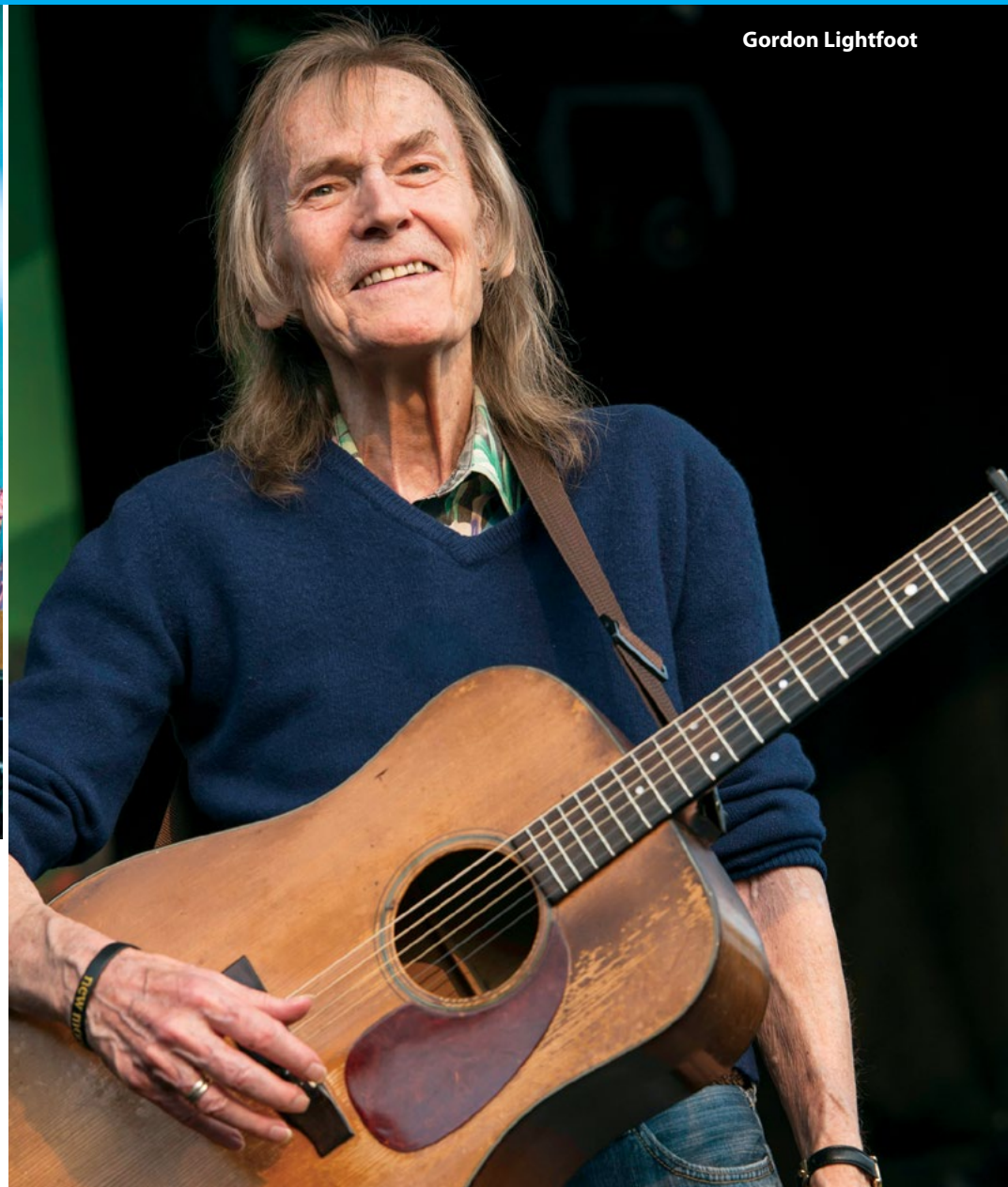
and policy frameworks, at every level of government and across departments and agencies that impact the live music industry. This requires mobilizing the grassroots to develop effective advocacy efforts and bring about positive change.

Strategic relationships

There are many government bodies whose decisions impact the live music sector, and with whom many live music industry players already have a working relationship. These include:

- Federal departments and agencies such as Canadian Heritage, and FACTOR;
- Provincial ministries including The Ministry of Tourism, Culture and Sport, and its agencies, the Ontario Media Development Corporation (Ontario Music Fund), the Ontario Arts Council, the Ontario Trillium Foundation, and the Celebrate Ontario program;
- The Ministry of the Attorney General and its crown corporation, the Alcohol and Gaming Commission of Ontario; and

Regulatory Factors and Government Coordination



Gordon Lightfoot

- Municipal governments and music offices.

Other partners may include:

- Destination Ontario
- Regional Tourism Organizations, the Tourism Industry Association of Canada;
- Chambers of Commerce and Boards of Trade, including their provincial and federal umbrellas;
- Business Improvement Areas and their umbrella associations;
- Regional development corporations;
- Economic development organizations;
- The Creative City Network of Canada;
- Statistics Canada;
- Canadian Federation of Musicians;
- Music industry and local music associations; and
- Music rights collectives.

Recommendations

1. Develop stronger relationships with all levels of government across Ontario (provincial, federal and municipal) to bolster the live music sector's education and advocacy efforts.
2. Identify priority regulatory and policy challenges common across the live music industry, and develop strategies to engage relevant government ministries and agencies to improve the regulatory and policy landscape.
3. Coordinate and work with music industry and other industry associations on matters of mutual interest.

Industry Infrastructure



Massey Hall, Toronto

Aeolian Hall, London
Photo Credit: Jason Plant
(MC Spirit Studios)



Improve the use of existing infrastructure (venues, technology, equipment) to enhance audience experiences, build the sector, and address industry needs

There's no show without a stage.

What if more live music venues close their doors? What if festivals can't operate due to poor or failing infrastructure? What if policy and regulatory frameworks don't keep pace with rising rents, gentrification of neighbourhoods, or changing cities? It's not just live music that suffers. These factors affect the entire social and cultural fabric of our communities, and the quality of life we have come to enjoy and expect in Ontario.

Live music spaces are incubators, social hubs, and gathering places for all kinds of artists and people. They are small businesses, community organizations and, in many cases especially where festivals are concerned, they are cornerstone, decades-old institutions with legacies that continue to impact upon generations of Ontarians. Live music spaces are just as important to our neighbourhoods

and cities as libraries and other cultural institutions. Industry and government must understand and internalize the critical importance of "the stage."

Challenges facing live music venues

Live music venues across the province face similar financial and social pressures. Rising rents, neighbourhood gentrification, and changing cities are factors that often combine to make historically significant and successful music venues struggle, and prevent new ones from thriving. The many challenges faced by live music venues can lead to reduced attendance and lower revenues. Noise or other complaints from as few as one person can conspire to shut out music festivals from public spaces. Rising costs can lead to the sale and outright loss of historical music spaces.⁵

Music venues often come into conflict with neighbours who say "not in my backyard," opening the door to regulatory barriers and creating other challenges. They also struggle to retrofit their physical infrastructure and make other updates, which can be costly but are ultimately necessary to keep the venue operational on a professional level.

Consultation respondents suggested that existing assets, such as government-owned venues and stages, could be better used to support the live music sector. Respondents reported that these venues are often programmed in competition with private-sector venues. At the same time, publicly-owned venues often suffer from obsolete infrastructure, and could support the industry and surrounding businesses more effectively if they were better supported and utilized.

⁵ "Live music's last hurrah?" David McPherson, Globe and Mail, December 18, 2017. Available at: <https://www.theglobeandmail.com/report-on-business/industry-news/property-report/property-report-livemusic/article37370297/>

Industry Infrastructure



The Townehouse Tavern, Sudbury
Photo Credit: Paul Loewenberg



The all-ages market is underserved

The results of our consultation indicate that audience demand for all-ages shows in Ontario is currently underserved. A primary reason for this is that the typical business model relies on alcohol sales to cover costs and generate profit for the live music presentation, which results in events marketed to and/or restricted to adults.

All-ages shows provide established artists with more opportunities to perform. They also give emerging artists, and the promoters and producers of tomorrow, the opportunity to learn and hone their skills in front of live audiences. Very importantly, they ingrain a love of live music, and the live music experience, in the hearts and minds of the young people who are tomorrow's audiences.

Expanding Ontario's live music venue inventory

Public spaces, such as libraries, community centres and schools represent an untapped resource with the potential

to significantly expand Ontario's live music venue infrastructure. This infrastructure exists in nearly every community across Ontario. If workable policies for off-hours use were developed, these spaces could be used for the presentation of all-ages events and other performances.

These public spaces are even more critical to live music in rural, francophone, and minority communities across the

province. Not all of these communities have dedicated music venues, but they frequently have public spaces that could be used to address this gap.

The Ontario Festival of Small Halls actively works to capitalize on these underused spaces in partnership with local partners. The Festival brings artists into all manner of spaces, converting them into temporary venues in small towns across Ontario.

Recommendations

1. Gather data on existing live music infrastructure (e.g. venues, stages) to gain a better understanding of the state of these assets.
2. Work with municipalities, communities and school boards to develop policies that allow for off-hours use of public and non-traditional (e.g. DIY) spaces for the purposes of live music presentation.
3. Advocate for better provincial and municipal policies to maintain and protect existing live music and rehearsal venues and support the emergence of new ones.
4. Prioritize research on all ages live music presentation as a critical step in audience development.

Impact Measurement

Spencer MacKenzie, Michael Dunston,
Collin Barrett, Quisha Wint, Ben Riley,
Lance Anderson (Musical Arranger/Director)
at An Evening of Blues & Gospel VII,
St. Paul's Centre, Orillia
Photo Credit: Andrew Strauss



Improve the impact measurement of the live music sector via better use of evidence-gathering, data collection & analysis

If every great song tells a story then research will be the industry's 'greatest hit.' Data and statistics allow us to communicate our unique and important value proposition, making the case for the economic, social, and cultural benefits that live music provides.

Existing data sources

Currently, information from a range of sources is used to provide estimates of the importance of the live music sector. These include government statistics, market research, membership data and other information from musicians and organizations, as well as statistics about concert revenues and audiences.

For example, Statistics Canada collects industry highlights and financial data including revenues, expenses, and operating profit margins on performing arts through its *Annual Survey of Service Industries: Spectator Sports, Event*

Promoters, Artists and Related Industries. However, this source of data has limited value to our industry, as it does not report on live music as a distinct category.

Culture Satellite Account (CSA) data provides information on the total value of the arts and cultural industries in Canada (broken down by province and territory) including data on live performance. A major limitation of the CSA is that live music has not been identified as a distinct sub-domain, which means certain aspects of live music (e.g. music festivals, live music in non-music venues such as bars and multipurpose event spaces) are not captured and therefore significantly skews, downward, the size and scope of the industry.

The Society of Composers, Authors and Music Publishers of Canada (SOCAN) recently released a study on urban Canadians' interest in live music. SOCAN also collects data on live performance

copyright tariff revenues that could allow for analysis of the revenues generated from live music performances. No extensive analysis has taken place to date.⁶

There are also a variety of private sector publications and data sources that form another key source of intelligence on the size and impact of our industry. But this data is often expensive, or not broken down in a way that is useful to live music operators.

All these sources of data reflect different collection methodologies. Typically, they do not provide insights at the provincial or municipal scale, and therefore have not translated into effective impact measurement of our sector. Tourism, hospitality and other industries could greatly benefit from direct and indirect observations and conclusions based on these data sources.

⁶ SOCAN conducted some analysis in 2013. Please see "Canadian Live Music Is Outperforming" at: <https://www.socan.ca/news/canadian-live-music-outperforming>

Impact Measurement



Buffy Sainte-Marie



Sade

Photo Credit: Maeghan Donohue



Jenna Strautman of Rotary Dial,
The Piston, Toronto

Photo Credit: Conor McSweeney

In December, 2015, Music Canada released the report *Live Music Measures Up: An Economic Impact Analysis of Live Music in Ontario*, which is described as the first comprehensive study of the live music industry in Ontario, providing critical data and information that can help guide decision-making within the sector by government and allied stakeholders.

According to Scott Lund, CEO of SW Sports & Entertainment in Sudbury, statistics are a catalyst for the development of Sudbury's live music sector. "For the Northern Ontario music market to reach its potential, it is important to have provincial and regional research. This is especially critical for smaller markets. It helps us to predict and support growth so we can leverage our local music economies in Sudbury and across the North."

Prioritizing future research

By virtue of live music's often ad-hoc nature, impact measurement is challenging for our sector. Moreover, live music creates important spill-over effects on other segments of our economy that are difficult to track. Also, since our industry can be highly competitive,

encouraging the sharing of data among us poses a challenge in and of itself.

The *Vision for Ontario's Live Music Industry* creates a valuable opportunity for our sector to prioritize data collection and analysis to develop long-term, big-picture recommendations based on evidence. Research will enable the sector to benchmark growth and identify further opportunities, barriers, challenges and successes. Most importantly, by improving the impact measurement of our sector,

we can ensure we are better equipped to demonstrate a strong business case for live music in our dealings with public funders, private financiers, and other interests.

This *Vision* proposes foundational recommendations that will increase the research capacity of Ontario's live music sector and improve the quality and scope of data and evidence available for decision-making and policy-setting.

Recommendations

1. Promote and advocate for greater ongoing research on the impact of the live music industry, and encourage the cooperation of industry associations to this end.
2. Leverage existing resources such as the Ontario Live Music Portal, municipal economic development offices, tourism organizations, and music industry associations for data.
3. Investigate partnerships with academic research institutions and private research and consulting firms to develop comprehensive, reliable data.

Moving Forward

The *Vision for Ontario's Live Music Industry* contains numerous recommendations to foster growth of the live music sector in Ontario and provide a platform for increased industry collaboration. The work of the Ontario Live Music Working Group will now shift towards setting priorities, developing plans to actualize the recommendations, and encouraging engagement across the live music sector in order to bring this *Vision* to life.

Key to the success of the *Vision for Ontario's Live Music Industry* is forging strong linkages between the various organizations that have an interest in the sector's success, within and outside of the live music industry, with government bodies at all levels, and among industry players big and small.

For its part, the Ontario Ministry of Tourism, Culture and Sport will continue to support the industry-government collaboration represented by the Ontario Live Music Working Group, and its future work towards the development of an Ontario Live Music Strategy informed by the *Vision*.

This *Vision* represents a ground-breaking conversation about the province's live music industry. We hope it will generate new dialogue within our sector, and among the diverse elements of our province's broader music industry. A key tenet of this *Vision* is inclusivity and bridge-building across the diverse landscape of Ontario's music industry. This *Vision* is intended to reinforce the importance of all music organizations and associations working together to build more productive relationships. We invite all elements of the music industry from artists, associations and collective societies, to managers, agents, promoters, venue operators, fans, government, businesses, and anyone else who wants to advance the interests of Ontario's live music industry, to help to bring this *Vision* to life.

Forty Seven Teeth, Wolfe Island Music Festival, Kingston
Photo Credit: Matt Forsythe



Walk Off The Earth, CityFolk, Ottawa
Photo Credit: Steve Gerecke



Five 2 Six, JamSchool Jamboree, Guelph
Photo Credit: Steve Thoms



Strategic Connections

Music Canada Live

Music Canada Live is a not-for-profit industry organization dedicated to helping the live music industry reach its full potential through research, collaboration and advocacy across Canada. It is a key potential resource for enabling dialogue and implementing, promoting and tracking the *Vision for Ontario's Live Music Industry*.

Tourism

Entertainment experiences, such as live music, are important drivers of tourism, which in turn is an important economic driver in Ontario. Live music holds important potential for attracting greater numbers of visitors, either as the primary attraction or as an add-on activity. Through this *Vision*, we hope to accelerate the creation of new and expanded tourism experiences through live music, including those that are multicultural, francophone and Indigenous. This *Vision* recognizes and promotes all opportunities to link with tourism organizations including Destination Ontario, the provincial agency responsible for tourism marketing.

Municipalities

Municipalities across Ontario are implementing local music strategies that formally recognize the economic, cultural and social value of live music, and aim to develop local artists, music scenes, and facilities and planning. These strategies focus on music-friendly policies, economic growth, and building partnerships. Many municipalities, such as Toronto, Kitchener-Waterloo, Hamilton, London, Barrie and Ottawa, to name a few, have made commitments to develop strategies to increase music-related activity. The *Vision for Ontario's Live Music Industry* seeks to leverage, facilitate, and foster these local efforts.



Dallas Smith, Rock the Park, London

Photo Credit: Mark Spowart

Appendix – Ontario’s Live Music Ecosystem

Numerous organizations play an important role in the live music sector, and we thank them all for the work they do. Here are some of them.

FUNDERS

Public

Department of Canadian Heritage
Canada Council for the Arts
Ontario Media Development Corporation
Destination Ontario
Celebrate Ontario
Ontario Arts Council
Ontario Trillium Foundation
Municipal arts councils and governments
SOCAN (private/public)

Private

Radio Starmaker Fund

MUSIC RIGHTS MANAGEMENT

SOCAN (private/public)
Re:Sound
ACTRA-RACS
MROC
Connect Music Licensing

GOVERNMENT PARTNERS

Federal

Department of Canadian Heritage
FACTOR

Ontario

Ministry of Tourism, Culture and Sport
and its agencies

Numerous Municipal and Regional Governments across Ontario

ALLIED ORGANIZATIONS

Creative City Network of Canada

UNIONS

Canadian Federation of Musicians
Toronto Musicians’ Association

MUSIC ORGANIZATIONS

Music Canada Live
Canadian Independent Music Association (CIMA)
Music Canada
Women in Music Canada
Toronto Music Advisory Council
Supporting Performing Arts in Rural Communities SPARC
Community-based associations

Artist-focused

Music Ontario
Toronto Blues Society
CARAS
Canadian Music Centre
Canadian Music Hall of Fame
Ottawa Music Industry Coalition
Music and Film in Motion
Association des professionnels de la chanson et de la musique (APCM)
Folk Music Canada
Songwriters Association of Canada
Music Managers Forum
Canadian League of Composers

Presenter Support Networks

Ontario Presents
Réseau Ontario
Folk Music Ontario
Festivals & Events Ontario
Orchestras Canada
Opera.ca
Choirs Ontario
Jazz Festivals Canada
CAPACOA

Appendix – Definition of Live Music

The definition of live music* established by the Live Music Working Group is an event at which the musical performance is the primary artistic characteristic, and at which one or more performers is compensated to:

- sing or otherwise perform live vocals; and/or
- perform live on instruments, from acoustic to electronic; and/or
- manipulate pre-existing sound recordings with a creative or curatorial aim;
- to a live audience at the same location.

This encompasses a broad range of venues and performance styles:

- from bands playing live instruments to DJs and electronic musicians;
- from traditional styles to innovative and experimental styles not yet defined;
- from performances of original songs to covers of existing songs;
- from opera to musical theatre;
- from small-audience recitals to large festivals;
- from styles emerging from any cultural or ethnic group in the world to new hybrid styles developing in Ontario; and,
- including live music presentation that is a component of non-music events and programming.

* Not all elements of this definition necessarily apply to the funding parameters of public programs.

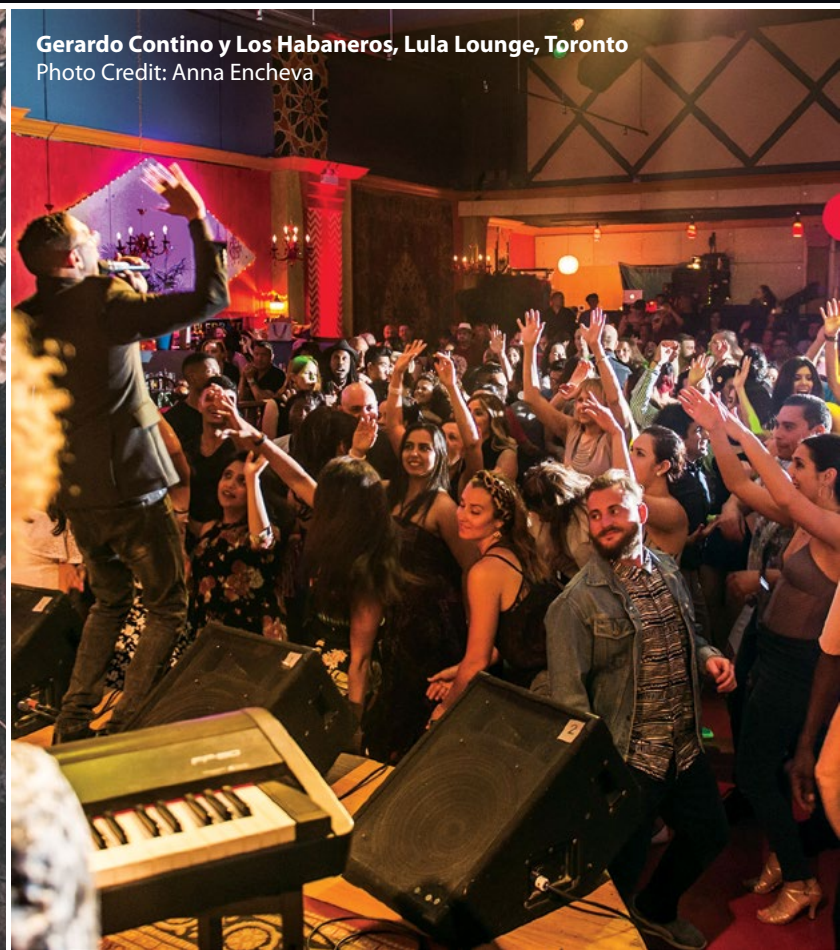
Allie X, Mod Club, Toronto
Photo Credit: Canadian Music Week



Acknowledgements



Partner, Longboat Hall, Toronto
Photo Credit: Canadian Music Week



Gerardo Contino y Los Habaneros, Lula Lounge, Toronto
Photo Credit: Anna Encheva

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The Once, National Arts Centre, Ottawa

Photo Credit: D. Brian Campbell



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Leela Gilday, National Arts Centre, Ottawa
Photo Credit: D. Brian Campbell