CANADIAN LIVE MUSIC ASSOCIATION 10 YEARS

JANUARY 2025

Hear and Now:

Understanding the economic power and potential of Canada's live music industry

Boots and Hearts Music Festival By Chris Ashlee

Acknowledgements

The Canadian Live Music Association (CLMA) and Nordicity would like to extend our thanks to all of our industry sponsors for making this project possible.

We extend our thanks to all of our industry sponsors for making this project possible: RBC Foundation, Live Nation, Ticketmaster, City of Missisauga, Music Canada, evenko, MLSE, City of Brampton, Stageline, Blueprint, Tourism Industry Association of Ontario, London Music Office, City of Hamilton, Lula Lounge, Market Hall Performing Arts Centre, and City of Toronto.

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We extend special thanks to our cohort of community connectors, whose invaluable collaboration and advisory support were key in engaging communities across Canada and ensuring the study reflects and serves Canada's vibrant and diverse live music sector.

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CANADIAN LIVE MUSIC ASSOCIATION 10 YEARS

The Canadian Live Music Association (CLMA) aims to establish the economic, cultural, and social importance of live music while fostering an environment where concerts can flourish. Through advocacy focused on policy development, funding, public awareness, and research, the association unites and amplifies the efforts of the live music industry, believing that collective action strengthens their voice. Its membership includes a diverse range of stakeholders, such as concert promoters, festivals, talent agencies, venues, clubs, arenas, performing arts centres, industry associations, networks, and suppliers.

Become a member today.

Nordicity

Nordicity is a leading international consulting firm that offers solutions in Economic Analysis, Strategy and Business Planning, Policy, and Regulation to private and public sector clients across three key areas: Arts, Culture & Heritage, Creative Industries, and Digital Economy & Innovation. Renowned for its expertise in designing methodologies to capture the social and economic benefits of arts and cultural activities, including cultural tourism, Nordicity has refined its approach to measuring the impact of the creative industries over decades.

Foreword

Ask any music fan about why live music matters, and they'll tell you. Yet for economists and policy makers, the value of the overall impact and importance of this vibrant Canadian industry has historically been overlooked.

It's time to change that.

"Hear and Now", the **first-ever** economic impact assessment of Canada's live music industry comes at a pivotal moment, as a recent global surge in interest begins to highlight and capitalize on the economic significance of live music that complements its well-known social and cultural value.

Why this, and why now? Because the potential of Canada's **live music infrastructure is ready** and waiting.

The small, medium, and large venues, clubs, concert halls, festivals, arenas, and other live music spaces that connect artists with their fans form a vast, complex, indoor and outdoor ecosystem. This is the system that facilitates live music–and its massive supply chain– across Canada, be it a national arena tour, or a one-off local show in a 120-cap independent venue...and everything in-between.

Understanding and harnessing this system creates a **significant and scalable competitive advantage** for Canadians and **for all levels of government,** and is essential for our artists so that they can continue to share the music we love and need. And why wouldn't we? This study is a benchmark, the numbers in it have been achieved largely in the absence of any dedicated fiscal policy frameworks aimed at incentivizing growth. **$10.92B in combined impact from live music and tourism spending... without trying.**

Today? It's clear that **protecting and growing** Canada's live music infrastructure **directly results** in more jobs, major economic impact for cities and towns, and more performance opportunities for Canadian artists. It means more fans choosing Canada when deciding where to spend their (billions of, as it turns out) music tourism dollars. It means sold out hotels, fully booked flights, bustling shops, and restaurants. It means togetherness and social cohesion. It means better mental health. It means thriving downtowns. It means attracting and retaining other industries and talent to our cities. It means more revenue for artists and musicians. It means more music and memories with family and friends that change our lives.

The Canadian Live Music Association was founded in 2014 to drive the narrative of the power of live music, and to collaborate with members and government to **stimulate increased sector capacity across the ecosystem**. With this new data in hand, we hope the hard evidence and robust research in this report will incentivize forward and innovative thinking about **the industry's place and potential for growth within Canada's cultural and economic framework**, expanding the appreciation of the impact of existing (or non-existent, as the case may be), policies and practices.

Let **Hear and Now** be your gateway to a deeper understanding of one of Canada's most dynamic and influential cultural industries, to level-set and amplify **the power and impact of live music** for the benefit of artists, all Canadians, and music fans here at home, and around the world.

Tarun Nayar
Chair - Board of Directors,
Canadian Live Music Association

Co-Founder, 5X Festival; Co-Founder, Snakes x Ladders; Artist

Erin Benjamin
President & CEO,
Canadian Live Music Association

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Canada's live music industry is an economic powerhouse.

The Results Are In

In 2023 alone, the Canadian live music industry generated **$10.92 billion** in **gross domestic product (GDP).**

Live music in Canada produced **$3.73 billion in tax dollars**

Live music also supported more than **101,640 jobs[1],** contributing **$5.84 billion** in labour income across the country **(see Table 1)**.

These numbers highlight the immense economic impact of live music and its role in driving jobs, growth, and economic prosperity nationwide.

1 Employment is expressed in terms of full-time equivalent jobs (FTEs), where an FTE is defined as someone who works a 40-hour work week, approximately 52 weeks per year. There are many individuals in the music industry who hold casual positions; multiple casual positions comprise 1 FTE.

TABLE 1:
Summary of Economic and Fiscal Impacts of Live Music, 2023

Category	Live Music Operations	Tourism	Total Impact (Operations + Tourism)
Employment (FTEs)	27,490	77,150	**101,640**
Labour Income	$1.17 billion	$4.67 billion	**$5.84 billion**
Gross Domestic Product	$2 billion	$8.92 billion	**$10.92 billion**
Fiscal (Taxes)	$514 million	$3.21 billion	**$3.73 billion**

Note: Figures may not sum to total due to rounding.

The economic impact of Canada's live music industry can often rival that of other Canadian industries that receive considerably more recognition in national policy conversations. By way of comparison, Canada's fisheries industry generates 32,500 jobs and contributes approximately $2.6 billion to GDP[2], while Canada's automotive industry generates approximately 125,000 direct jobs and contributes approximately $14 billion to GDP.[3]

As the first study to assess the economic impact of live music in Canada, Hear and Now establishes a crucial benchmark for measuring the industry's potential and progress over time. Operating in an ever-evolving landscape, live music is becoming increasingly important and its potential for growth, along with the economic returns it generates, is clear.

It serves as a vital source of income for artists – especially as revenue from streaming services remains limited – supporting not just individual careers but the entire foundation of the music ecosystem.[4] Additionally, the rise of immersive technologies including the use of video game platforms for live music events,[5] and the boom in global music tourism, signals significant growth potential.[6] While live music in Canada continues to navigate post-pandemic challenges and shifts in the landscape, these trends point to a thriving industry full of opportunity and ongoing growth.

2 Unifor. 2022. "Fisheries Sector Profile."
3 Canadian Vehicle Manufacturers' Association. 2023. "State of the Canadian Automotive Industry."
4 Nordicity. 2023. "The Digital Media Universe: Measuring the Revenues, the Audiences, and the Future Prospects."
5 Music Ally. 2024. "Sony Music talks immersive tech: 'We are doing a lot of testing...'"
6 Custom Market Insights. 2024. "Global Music Tourism Market Size Likely to Surpass at a CAGR of 8.5% By 2023."


(Rauw Alejandro at) Scotiabank Arena

Live music companies spent an estimated $1.65 billion in 2023; the total GDP impact of this expenditure is an estimated $2 billion.

According to Statistics Canada, the national contribution from all culture and sport in 2023 was $60.8 billion, implying that live music operations contributed approximately 3.3% of Canada's culture and sport GDP impact."

A Snapshot of Live Music in Canada

Canada's live music industry is vast and varied.

Canada is home to more than **3,750 (and counting)** venues, music festivals and events, promoters, rehearsal spaces, managers and agents, live music production companies, equipment rental companies, support organizations, cultural festivals, showcases, and award shows.[7] This number continues to shift by day as the industry constantly evolves. Live music venues, festivals, events, and award shows in particular play an integral role in the country's live music industry. Not only are they the industry's core source of job creation, but they also are critical for artist development. By playing to live audiences, artists grow their fanbase and following, and expand their reach into new markets. The collaborative relationships between people across the whole music ecosystem – from venue staff and promoters to managers and agents – are also critical artists' success.

7 For more details, please see the live music industry asset map provided in 3.1: Profile of Live Music in Canada.

Live music in Canada is highly active, and is continuing to evolve, mature, and diversify.

Hear and Now survey results show that Canadian concert bookers and promoters booked an estimated **18,945 live music shows** in Canada in 2023 – that figure conservatively translates to **50 shows per day across the country.** While activity tends to be concentrated in densely populated areas, live music is unique in that it spans both urban and rural communities alike. It also nurtures the next wave of Canadian artists while also celebrating local stars, with artists serving as a source of community pride and contributing to Canada's reputation as a global music tourism destination.

According to results from the survey, more than half of company owners and leaders identify as women. Additionally, roughly a third of company owners and leaders identify as members of the 2SLGBTQ+ community. While these survey results are not inclusive of all companies in the industry, this data suggests positive strides are being made in gender representation. However, these advancements may not be equally inclusive of IBPOC communities. For instance, approximately 21% of women company owners and 24% of women company leaders that responded to the survey identify as Indigenous, Black, or a Person of Colour. Fully assessing the diversity of the industry would require further exploration, as is being done by organizations such as ADVANCE Canada's Black Music Business Collective, Women in Music Canada, Breaking Down Racial Barriers (BDRB), and the recently formed Indigenous Music Office, along side the ongoing work of CLMA.

In 2022, CLMA produced a report called Closing the Gap that examined the challenges confronted by by Indigenous, Black, and other racialized individuals working in Canada's live music industry. The report included actionable policy recommendations that CLMA continues to advocate for on behalf of the industry.[8] Supporting the conditions for a more diverse industry not only brings about richer, more dynamic live music in Canada, but has been shown to drive innovation, leading to stronger financial performance and greater economic returns.[9]

Live music is vital to Canada's social fabric.

Beyond its significant economic contributions, live music is a core tourism driver and brings people together, fostering opportunities for connection around a shared cultural experience. Across Canada, live music helps build a sense of local, regional, and national pride and identity through homegrown talent and cornerstone music venues. It also improves the quality of life and well-being for all Canadians, and enhances city building, placemaking, and safety by transforming public spaces into vibrant culture hubs.

8 CLMA. 2022. "Closing the Gap: Impact & Representation of Indigenous, Black, and People of Colour Live Music Workers in Canada."

9 McKinsey. 2020. "Diversity wins. How inclusion matters."

Canadian concert bookers and promoters booked an estimated 18,945 live music shows in Canada in 2023 – that figure conservatively translates to 50 shows per day across the country

Calls to Action

To help Canada's live music industry realize its growth potential and continue making significant economic contributions, **Hear and Now** research has identified several key calls to action:

1.

Protect existing venues as the lifeline of the industry.

2.

Support risk-taking among venues & promoters with strategic initiatives.

3.

Engage the private sector through sponsorships, partnerships, & collaborations.

4.

Address & assess systemic barriers faced by IBPOC individuals & members of the 2SLGBTQ+ community.

5.

Attract, nurture, & retain talent in Canada's live music industry.

6.

Improve fair compensation and working conditions to attract & retain talent across the industry.

7.

Foster national connection and collaboration to tackle industry-wide challenges.

8.

Encourage innovative business models, including new revenue strategies and more robust contingency planning.

9.

Integrate live music more deeply into Canada's tourism initiatives, capitalizing on its potential to drive tourism and cultural engagement.

Acting on these areas will help support an environment where live music can flourish, generate more jobs and opportunities for artists to grow and expand their careers, and **unlock even greater economic potential for the benefit of all Canadians.**

Centre Bell by SNAPePHOTO

NXNE by Kirsten Sonntag

Section I:

INTRODUCTION

1.1 **About this Project**

As the first-ever economic impact assessment of the Canadian live music industry, this study comes at a critical moment in time.

The industry is operating in a rapidly evolving landscape and contending with many factors that could fundamentally shift the industry. There are increasing environmental concerns, acknowledgement of the need for more concerted efforts towards equity and inclusion, and uncertainty surrounding artificial intelligence – all the while the live music industry is still grappling with post-pandemic recovery. However, live music is becoming increasingly important and its potential for growth, along with the economic impact it generates, is clear. Not only does live music serve as artists' most meaningful source of income[10], but trends such as the rise in global music tourism signals significant growth potential in the industry.[11]

Until now, the economic contributions of live music across Canada have largely been unquantified. The research laid out in this report documents the direct, indirect, and induced economic impacts of the live music industry, including the tourism and fiscal impact of the industry at the national level. Beyond its economic footprint, this report provides a broad profile of live music in Canada and concludes in an exploration of the most pressing challenges and needs for live music to continue to thrive in Canada.

10 Nordicity. 2023. "The Digital Media Universe: Measuring the Revenues, the Audiences, and the Future Prospects."
11 Custom Market Insights. 2024. "Global Music Tourism Market Size Likely to Surpass at a CAGR of 8.5% By 2023."

Dawson City Music Festival by John Howland

Starlite Room by Dana Zuk

The economic impact of Canada's live music industry can often rival that of other Canadian industries that receive considerably more recognition in national policy conversations. By way of comparison, Canada's fisheries industry generates 32,500 jobs and contributes approximately $2.6 billion to GDP[12], while Canada's automotive industry generates approximately 125,000 direct jobs and contributes approximately $14 billion to GDP.[13]

Live music is a powerful industry in Canada, and with further support and attention, it could deliver even stronger economic impact.

Why is this data useful?

The data will help the live music industry quantify its economic impacts and articulate the value the industry brings more broadly (e.g., social impacts). The data in this report will also help the industry identify and address current challenges and opportunities. The key objectives of Hear and Now are to:

- Advance awareness of the global competitiveness of the scope and importance of Canada's live music industry;
- Enable companies and organizations to make data-driven decisions;
- Illuminate trends, shifts, and challenges affecting the industry;
- Showcase areas of opportunity;
- Communicate the industry's value to other sectors to explore and amplify collaboration opportunities;
- Contribute to a global picture of live music.

12 Unifor. 2022. "Fisheries Sector Profile."
13 Canadian Vehicle Manufacturers' Association. 2023. "State of the Canadian Automotive Industry."

1.2 **Summary of Methodology**

Several research methods were employed to collect and analyze data for this report. These tools and techniques are explained below.

National Survey

The **Hear and Now** Survey was launched to the public on April 30, 2024, and closed on July 12, 2024, as the primary financial data collection tool for this project. In addition, the survey also gathered non-financial information to help inform analysis on the strengths and needs of the industry, as well as non-economic impacts (including social impacts). The survey was open to anyone across the country, and was shared widely though CLMA social and email channels. The survey was further promoted by a series of community partners with strong networks in regional and local music industries to ensure broad representation. A total of 387 completed responses were received, plus an additional 264 partial responses with usable data. For a fulsome breakdown of survey respondents, please see Appendix A.

Half (50%) of the respondents were answering on behalf of a music business or performing arts organization; just over one-third (34%) were a self-managed artist, musician, performer, band, DJ, choir, or related; and 16% were freelancers in the music industry. The following chart shows the survey respondents broken out by respondent type.

Engagements

Supplementary to the national survey, a series of regional roundtables were held to gather qualitative findings about the industry. These roundtables were held across Canada, including with industry representatives from Ontario, Quebec, British Columbia, the Prairies, Atlantic Canada, and Northern Canada. Additionally, Nordicity held a number of key informant interviews with organizations that represent Indigenous and Black music communities, as well as environmental advocacy groups. A total of 9 regional roundtables and 11 interviews were held, involving roughly 54 participants in Canada.

Secondary Research

Primary research findings were validated through existing literature and secondary sources. For instance, reports from the International Federation of the Phonographic Industry (IFPI), **Closing the Gap**[14], Statistics Canada, among others were examined and cited throughout this report.

14 CLMA. 2022. "Closing the Gap: Impact & Representation of Indigenous, Black, and People of Colour Live Music Workers in Canada."

King Eddy by Sebastian Buzzalino

Economic Impact Assessments

The economic impacts of live music companies' and organizations' operations as well as tourism spending were estimated using primary data collected via the **Hear and Now** Survey, select secondary research sources, and two economic impact modeling tools. The tools used included Nordicity's proprietary MyEIA™ model, and a customized tourism model informed by MyEIA™ informed by the Government of Ontario's Tourism Regional Economic Impact Model. A summary of the data sources and analytical tools used are provided in the table below.

TABLE 2:
Summary of Data Sources and Tools

Impact Area	Data Sources and Analytical Tools Used
Live music company operations	**Hear and Now** Survey MyEIA™
Tourism spending and impacts	**Hear and Now** Survey National Travel Survey Visitor Tourism Survey National Tourism Indicators Customized tourism EIA™ model

Jessie Reyez at Calgary Stampede

(Steve Lacy at) Vogue Theatre by Bruno Martin del Campo

Section II:

ABOUT LIVE MUSIC

"Live music" is defined as music played by an individual or group in front of a live audience.

Although the industry also encompasses many types of performances in many different settings and forms – whether intimate shows at cafés, bars, and parks, performances in concert halls and underground spaces, or massive stadium concerts – at its core, the emphasis on in-person settings is what makes the industry unique, distinguishing it from its recorded music counterpart.

For the purposes of this report, the various aspects of the live music industry were categorized as follows:

TABLE 3:
Music Industry Categorization Framework

Category	Sub-Category	Description/Examples
Venues	Core Live Music Venues	Dedicated live music venues such as concert halls, theatres, performing arts centres, and amphitheatres.
	Occasional Live Music Venues	Occasional live music venues such as bars, pubs, cafés, restaurants, clubs, convention centres, sports arenas, and banquet halls.
Professional Services	Live Music Promoters	Individuals or organizations that coordinate, market, and/or facilitate live music events.
	Live Music Recording or Rehearsal Spaces	Professional spaces such as recording studios and/or rehearsal studios to capture or record live music.
	Live Music Managers, Agents	Individuals or organizations that represent and support live music artists by handling activities such as bookings, negotiations, and career development.
	Live Music Production Companies	Individuals or organizations that produce and/or manage live music including sound engineering, stage design, and event coordination.
	Live Music Equipment Rentals	Businesses that supply musicians and event organizers with professional audio, lighting, staging, or instruments for live performance.
	Live Music Support Organizations	Live music support organizations such as industry associations or societies.
Professional Organizations	Artist Entrepreneurs	Those who run a business as an artist, musician, DJ, band, or related.
	Choirs	Community-based or organization-led choirs.
	Orchestras	Community-based or organization-led orchestras.
Showcase and Celebration	Music Festivals and Events	Festivals and events that showcase live music.
	Indigenous Live Music	Activities or events that include live music such as drumming, throat singing, and powwows.
	Cultural Festivals with Live Music	Festivals and events with live music as a component of the event, but not the main feature of the event.
	Awards Shows	Awards shows or ceremonies that acknowledge and celebrate the achievements of live music work and artists.

Live music contributes significantly to city building and placemaking activities by increasing a city or town's vibrancy, livability, and quality of life for its residents.

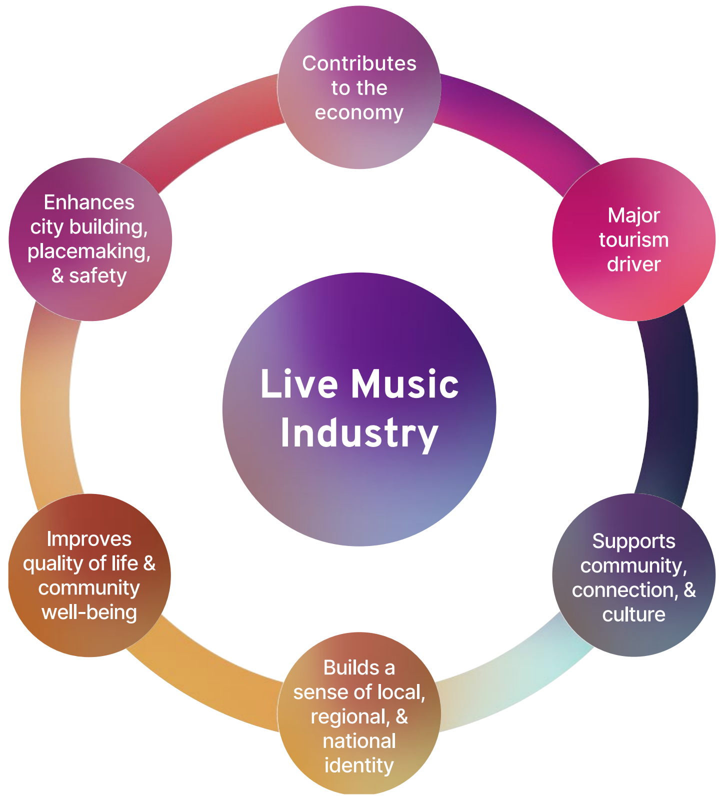
While there are several secondary industries that support live music, they are not included in the scope of this study. For instance, the transportation and hospitality industries play significant roles in facilitating live music events. Additionally, fields like music education and music therapy make use of components of live music. However, these secondary industries fall outside the focus of this study.

2.1 **The Benefits of Live Music**

The live music industry provides many benefits to society beyond entertainment. For one, the live industry is a powerful economic driver. It generates employment across a wide spectrum from musicians themselves to venue staff and event organizers, to technicians and crews, to food and bar staff, among others. Live music also attracts tourists who stay in hotels, eat in restaurants, buy local goods, and other services, stimulating local economies across the country. It is also a core driver of nighttime activity, whereby the presence of artists and venues brings people out of their homes and contributes to a bustling, vibrant nighttime economy. Moreover, music is a year-round activity, meaning the benefits of music tourism are not tied to a specific season and can extend to off-peak seasons. In further illustration of this point, a detailed breakdown of the economic and tourism impact of live music is provided in **Section 4: Impacts of Live Music**.

While important, the benefits of live music go beyond the economy and tourism. Live music offers a number of additional social benefits as described below.

FIGURE 1:
The Benefits of Live Music



Live music plays a critical role in fostering **community connections** and **cultural exchange**, creating a shared, collective experience. Venues in particular serve as key gathering places that bring people in a city together, helping to build a sense of community and belonging, especially for those from equity-deserving communities who may lack spaces to gather.[15]

As a key form of cultural expression, live music can also act as a gateway to opening minds and exposing people to new ideas and new cultures. In this way, live music contributes to greater **cultural exchange, awareness, and understanding** within a community. Moreover, live music is also inherently public facing. Witnessing diverse representation on stage – artists like Tanya Tagaq, k.d. lang, and Deborah Cox – can have a profound impact on inspiring future generations from historically underserved communities.

15 Nordicity. 2020. "Re:Venues: A Case and Path Forward for Toronto's Live Music Industry."

Additionally, live music can instill a sense of **pride and identity**. In a country as geographically spread out as Canada, well-known music acts, festivals, and events help build up local pride and strengthen a broader national reputation that excites and unites people.

Studies have also shown that music can also help alleviate depression, anxiety, and other mental health issues by activating the brain's pleasure receptors. Engaging in live music enables people to process emotions, recover from trauma, and connect with others. In other words, live music plays a vital role in **mental health and well-being**. Some doctors are recommending music-based interventions over traditional antidepressant medications.[16] Moreover, live music can help counteract social isolation and loneliness, which affects one in four older adults, and 515% of young adolescents worldwide, as noted by the Word Health Association.[17]

Live music also contributes significantly to **city building** and **placemaking activities** by increasing a city or town's **vibrancy, livability, and quality of life** for its residents. Cultural activity is an attractive feature that entices people to live and work in a given place. Live music can breathe life into public and cultural spaces, attracting highly skilled and educated individuals who, in turn, contribute to the local economy by launching businesses, creating jobs, and fostering innovation. Music districts and the clustering of music-related facilities, like live venues, foster cultural richness that attracts other creative professionals and industries, such as film, television, and live events. This cultural vibrancy enhances the city's appeal, offering both residents and visitors unique experiences that make it a desirable place to live.

Live music can also rejuvenate underdeveloped parts of a city, drawing more foot traffic to nearby businesses and spurring further commercial growth. Increased foot traffic enhances public safety, and this improvement can lead to more appealing neighborhoods that attract further artistic and cultural activities, along with additional residents, businesses, and investment.

Live music contributes to greater cultural exchange, awareness, & understanding within a community.

Supercrawl by Mike Highfield

16 BC Alliance For Arts + Culture. 2022. "Arts on Prescription."
17 World Health Association. N.d. "Social Isolation and Loneliness."

How Live Music Shapes Urban Vitality:
The Case of Hamilton, Montreal, and Nashville

The City of Hamilton, Ontario has sought to rebrand itself from an industrial powerhouse to a "vibrant, creative destination.[18]" Through efforts like the development of a Music Strategy and the introduction of live music-friendly policies, Hamilton has become a welcoming environment for music professionals and creatives in Canada.[19] This attraction of talent has, in turn, contributed to the revitalization of its downtown. Hamilton ranks seventh worldwide in the highest number of independent music venues per capita.[20]

In Quebec, Montreal also stands as a prime example of how live music spaces can enhance urban vibrancy. The Quartier des Spectacles – a culture hub and entertainment centre in the heart of the city – has helped to attract visitors and make the city a more vibrant place to live, work, and play. Many music events are held in the Quartier des Spectacles, including the renowned Montreal International Jazz Festival.

Dubbed the "Music City," Nashville, Tennessee, has positioned its music industry as central to its identity and economy. Live music permeates the city, from the Grand Ole Opry to the many live music venues lining its historic Music Row. Faced with growth pressures that have put its live music assets at risk, governments have responded to protect those assets with policy measures like their new Tennessee Live Music Fund and site-specific development planning.[21] These protective measures will help to ensure that Nashville's live music ecosystem remains one of the city's main calling cards for visitors and locals alike.

Municipalities across Canada are strategically supporting the growth of their music industries, having recognized the impacts the industry can have on communities. Mississauga was recognized as the CLMIA's 2023 Music City of the Year for their work developing a Music Strategy[22], to grow the city's music industry and build up Mississauga as an "incubator for top musical talent and a national destination for live music events and festivals".[23] [24]

18 Toronto Star. 2023. "City of Hamilton is getting a new downtown landmark called The Design District."
19 City of Hamilton. 2023. "Music in Hamilton."
20 City of Hamilton & MDB Insights. 2018. "City of Hamilton Creative Industries Sector Profile Study."
21 Metropolitan Government of Nashville and Davidson County. N.d. "Music Row Vision Plan"; Billboard. 2024. "Tennessee Bill That Would Create a Live Music Fund for Indie Venues Passes State Legislature."
22 City of Mississauga. 2022. Mississauga Music Strategy 2022-2026.
23 City of Mississauga. 2023. "Mississauga hits all the right notes as the 2023 Music City of the Year."
24 An Economic Impact Assessment of Live Music in Mississauga was subsequently developed in 2024, in parallel to this national study, to continue to advance the goals of the City's Music Strategy.


Photo courtesy of Metalworks Institute

Photo courtesy of Small World Music

2.2 **Live Music's Role in the Music Ecosystem**

Live music forms a key part of the broader music value chain. While distinct from recorded music, it is nearly impossible for one to exist without the other. Listeners on platforms often translate to in-person audiences at live shows, and vice versa. Many engineers dabble in both recorded and live production. For an artist, live and recorded music form two inseparable parts of the ecosystem in terms of their earnings and audience development. Indeed, live music has become even more significant to the music ecosystem in recent years, becoming the primary source of income for most artists in the face of low earnings generated from streaming platforms.[25]

The Importance of a Venue Ladder for Artist Growth

There are many elements of a robust live music industry, one of which includes having diverse venues that cater to various audiences, genres, and audience sizes. Venues serve as the backbone of the live music industry by providing a platform for artist discoverability and audience growth, and thus are a critical stepping stone in an artist's development.[26]

As an artist grows over time, they ideally move up the rungs of the venue-ladder, starting out in small bars or cafés, to theatres, to one day amphitheaters and stadiums. Nevertheless, venues are essential for the sustainability of the live music industry and, by extension, the broader music industry as a whole.

25 Nordicity. 2023. "The Digital Media Universe: Measuring the Revenues, the Audiences, and the Future Prospects."

26 Nordicity. 2020. "Re:Venues: A Case and Path Forward for Toronto's Live Music Industry."

The Role of Music Festivals in Supporting Emerging Artists

Music festivals in Canada are pivotal in helping emerging artists gain visibility and grow their careers. These events across the country (e.g., Montreal International Jazz Festival, 5X Fest, Winnipeg Folk Festival in Manitoba, Afrofest, RISE Edutainment) offer artists opportunities to perform in front of large audiences, connect with industry professionals, and access mentorship through panels and workshops.

Music festivals in Canada serve as vital stepping stones for emerging artists, helping them navigate the path to broader industry recognition. The benefits of increased exposure and access to industry networks are significant. Even artists who may not be selected for showcases can gain valuable connections through discounted registration for industry events and access to resources.

While many festivals feature showcases for new talent, such as Bow Valley Music Festival, some events like Departure Festival + Conference (formerly known as Canadian Music Week) and North by Northeast (NXNE) include industry-focused components that bring together artists, music executives, agents, and media outlets from across the country. Membership organizations like Folk Canada[27] also exist to provide workshops and panels that help foster connection and resource sharing for a stronger, united live industry. These events function as centralized hubs for networking, fostering an ecosystem where artists can perform, learn, and engage with key industry players, ultimately paving the way for new talent to thrive.

27 https://www.rootsmusic.ca/2024/09/26/folk-music-ontario-is-now-folk-canada/

Shambhala Music Festival by DIVISUALS

Section III:

THE LIVE MUSIC INDUSTRY IN CANADA

3.1 **Profile of Live Music in Canada**

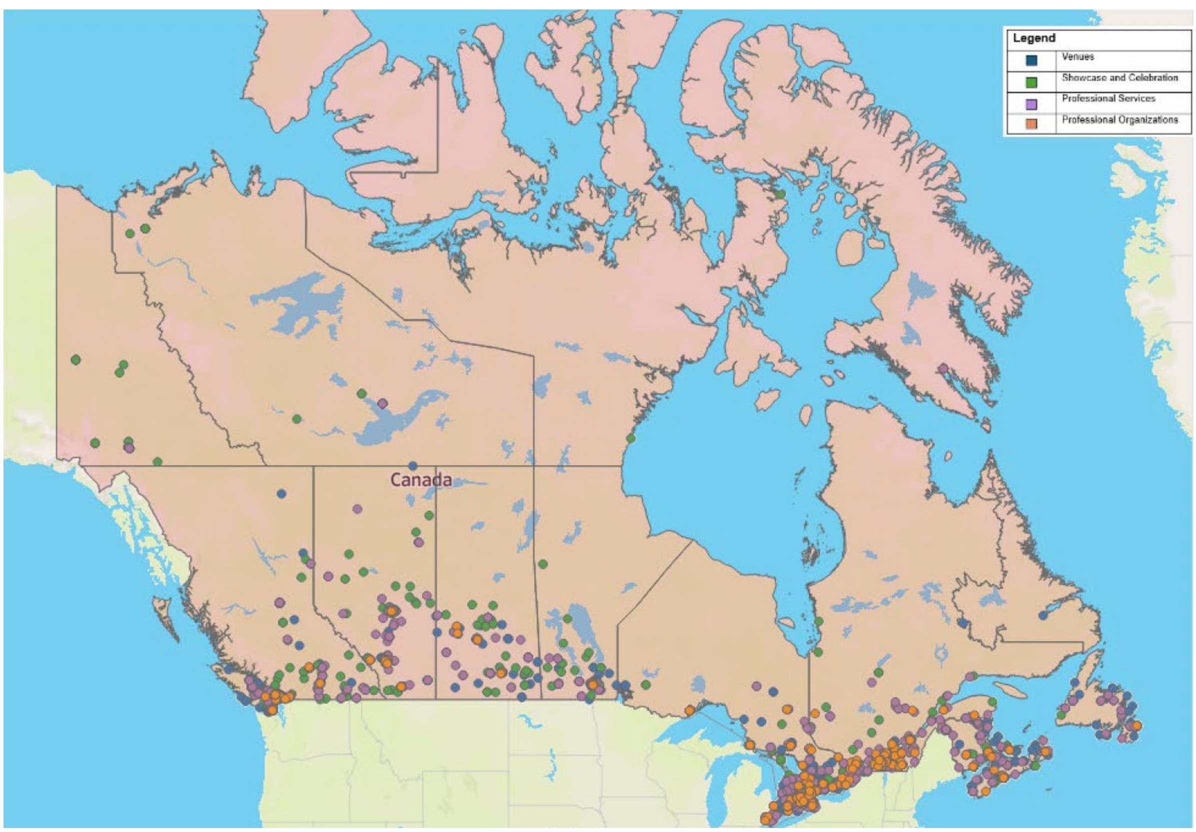
The live music industry in Canada is highly diverse and made up of several different types of "assets."[28]

Assets include the various tangible (physical spaces and places) and intangible (such as stories and traditions) resources that are integral to the operation of an industry and possess economic value. In the context of the music industry, assets include venues, professional services, and music-related businesses and organizations.[29]

To support an understanding of the breadth of the Canadian live music industry, these assets have been visualized into a dynamic spatial map, as seen in Figure 2 below.[30] Note that the spatial map is not exhaustive. It excludes individuals and certain locations, such as those that are not registered or are without readily available addresses.

28 Please see Table 3 in Section 2 for a categorization of the various live music industry assets used.
29 Full asset identification identified via the Music Industry Categorization Framework Figure 1.
30 The mapping approach included using publicly available sources for all aspects of the mapping, including open data sources and shapefiles. The asset list was compiled through desk research which included a three-tiered approach using registered businesses from D&B Avention, provincial music industry association lists, and a web scraping on Google Maps.

FIGURE 2:
Overall Live Music Asset Map



Source: CLMA EIA Asset Identification and Tableau

The full map, as well as individual maps focusing on four main categories (venues, professional services, professional organizations, and showcase and celebration) is accessible and can be viewed via Tableau.[31]

The map provides a snapshot of some **3,750 known assets** that were identified spread across the country.[32]

While this map is certainly not exhaustive, it does indicate that:

- Hard infrastructure such as traditional live music venues and entertainment establishments are predominantly located in urban areas – largely correlating with population centres.
- Festivals and events are more widely dispersed across the country and not confined to urban areas. It is acknowledged that many festival organizations have invested in permanent infrastructure in their respective communities. However, the spatial map illustrates that showcases and celebrations are not limited to formal venues, but also utilize open spaces like fields and parks.
- Music related work and activity does not only occur in urban centres. Professional services related to the production of live music (e.g., music production, editing support), are more dispersed across the country, indicating that the live music industry supports employment for Canadians in both rural and urban contexts.

31 The interactive map is a dynamic tool that offers features beyond a static map. Users can filter data and hover over specific live music assets to reveal details such as the asset's name, city, and subcategory, enhancing the depth and usability of the visualization. On a broader scale, the tool enables users to grasp the full scope of live music activities occurring nationwide. This map can be updated and continually added to (e.g., on an annual basis) if new lists of assets are shared with Nordicity.

32 It is important to note a few limitations and constraints of the spatial map. First, it represents only a snapshot in time, as assets such as businesses or venues can evolve, relocate, or cease operations. Additionally, the map does not focus on identifying specific individuals but focuses assets which could be identified by a registered business number. Certain categories, such as restaurants and bars that host live music occasionally were identified using industry association lists rather than individual research, as there are too many general establishments to identify comprehensively. Finally, the spatial map does not include all identified assets from the asset resource identification exercise such as those which did not have readily available addresses.

First Light Centre for Performance & Creativity by Dan Smith

Venues serve as the backbone of the live music industry by providing a platform for artist discoverability and audience growth, and thus are a critical stepping stone in an artist's development.

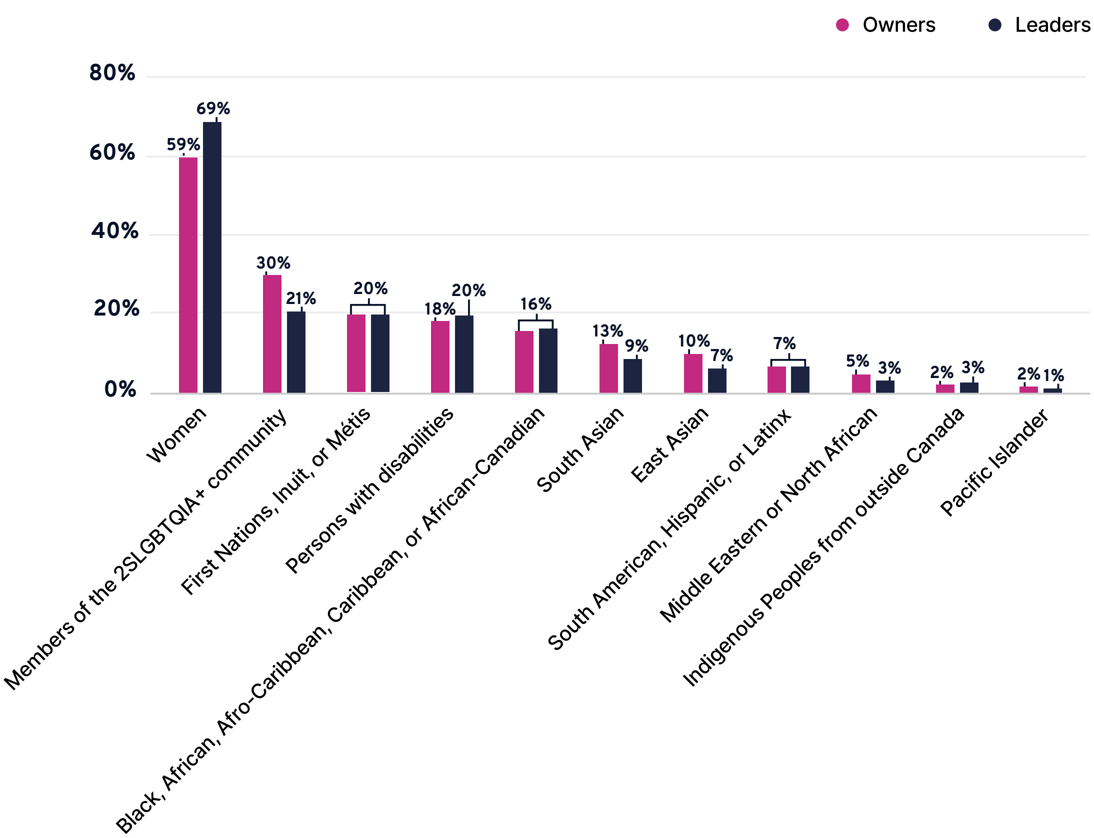
3.1.1 Demographic of Live Music in Canada

While limited data exists on the demographic breakdown of the live music industry specifically, data from the **Hear and Now** Survey, as well as other existing industry reports, shed light on representation in the industry.

Survey results indicate that the majority of companies are owned and led by women, with 59% of company owners and 69% of company leaders identifying as women (see Figure 3 below). Additionally, 30% of company owners and 35% of company leaders identify as members of the 2SLGBTQ+ community.

By contrast, less than a third of company owners and company leaders who responded to the survey did not identify as part of any equity-deserving group. This data, visualized in Figure 3 below, suggests that the industry is making strides in gender representation, however, these strides may not be inclusive of IBPOC communities. For instance, only approximately 21% of women company owners and 24% of women company leaders identify as Indigenous, Black, or a Person of Colour. As the survey is just a sample of the industry, further investigation into this topic is recommended.

FIGURE 3:
Diversity of Music Company Owners and Leadership



n=184
Source: Nordicity, Hear and Now Survey

There is less representation, overall, when it comes to Indigenous, Black, and People of Colour (IBPOC) in Canada's live music industry. According to Closing the Gap – a report highlighting the challenges and inequities in live music – a number of systemic barriers continue to exist for IBPOC live music workers in Canada.[33] These barriers include underrepresentation in leadership roles, disparities in income, and career progression.

While IBPOC individuals are more frequently represented in artist roles, survey respondents who identified as white individuals are more commonly found in entrepreneur and business ownership positions.[34] When it comes to employment status by race, Indigenous, Black, and People of Colour are more likely to hold additional jobs outside the live music industry to support their livelihoods. Indeed, according to a recent report by ADVANCE, IBPOC people in the music industry reported significantly decreased wages as a result of the pandemic, and the percentage of workers who relied on income sources outside of the music industry during the pandemic significantly increased.[35] In contrast, those who identify as white are more frequently represented among full-time workers in the industry, suggesting that IBPOC may face greater challenges in accessing higher-paying opportunities within the industry.[36]

3.2 **Live Events in Canada**

In 2023, the global music industry experienced a robust recovery from the pandemic, with revenue surging to $40 billion globally – nearly double pre-pandemic levels. The Canadian music market also grew by 12.2%, reaching US$659.6 million, as the 8th largest music market globally. This increase marked the ninth consecutive year of growth for music globally.[37]

However, global live music events in 2024 fell short of their projected performance, which was reflected in several major festivals in North America, such as Coachella. By examining the revenue per available room (RevPAR) in local vacation rentals during festival weekends, researchers can assess the festival's overall performance. Beyond lower Coachella ticket sales, the data revealed that accommodations reached 61% capacity compared to 72% in 2023. [38]

There are several potential factors contributing to the above outcome. Cancelled tours and festivals due to lower ticket sales, rising costs, and environmental impacts has led to overall industry decline, and high prices for top acts are exhausting fan budgets leaving less for mid-range artists. Relatedly, other elements such as rising inflation, visa fee hikes, and shortages of touring essentials have increased the costs of staging tours. Smaller venues, which are crucial for emerging artists, are closing, which is reducing options for smaller-scale performances. Finally, despite the market being saturated with tours, many fans are choosing between fewer shows, leading to oversupply.

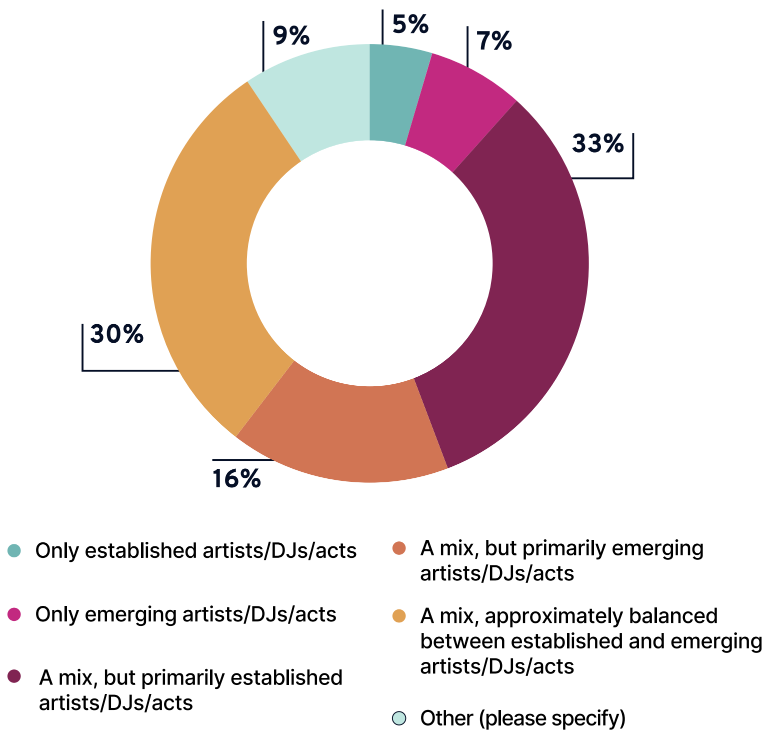
Live music venues and festivals, events, and award shows in Canada play an integral role in the country's live music industry – especially in terms of their revenue, expenses, profits, and labour dynamics. Survey results indicate that Canadian concert bookers and promoters booked an estimated 18,945 live music shows in Canada in 2023 – which, conservatively translates to approximately 50 shows per day across the country.

Venues in Canada showcase a diverse range of music show types, with the vast majority (a combined 79%) of venues showcasing a mix of emerging and established musical acts. Approximately 33% of venues that present a mix of emerging and established acts primarily showcase the established acts, and a further 33% showcase a balance of emerging and established musical acts. The chart below illustrates the breakdown of music show types in Canadian venues.

In 2023 the Canadian music market grew by 12%, reaching US$659.6 million, as the 8th largest music market globally.

33 CLMA. 2022. "Closing the Gap: Impact & Representation of Indigenous, Black, and People of Colour Live Music Workers in Canada."
34 CLMA. 2022. "Closing the Gap."
35 ADVANCE. 2022. "Industry Analysis & The Value of Black Music In Canada."
36 CLMA. 2022. "Closing the Gap."
37 IFPI. 2024."Global Music Report 2024."
38 Lamba, G. 2024. "Coachella vs. Stagecoach Impact on Short-Term Rentals."

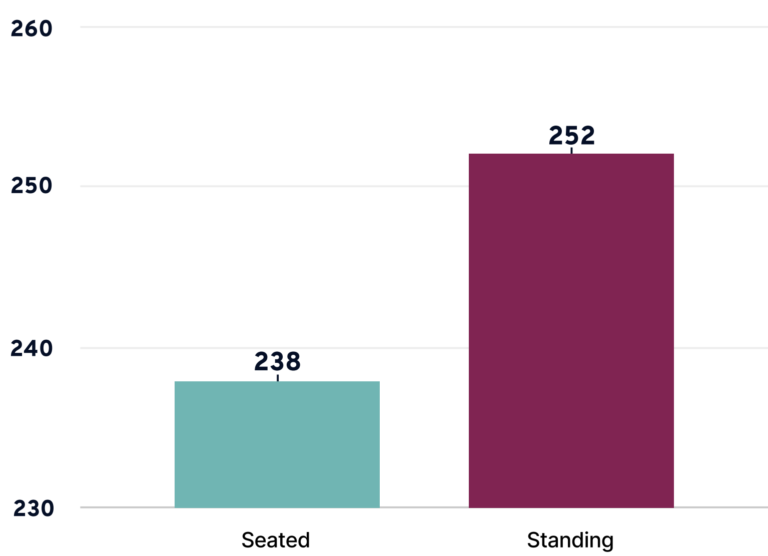
FIGURE 4:
Music Show Types in Canadian Venues



n=43
Source: Nordicity, Hear and Now Survey

Live music venues in Canada have an estimated average maximum capacity of 238 people for seated shows, and 252 for standing shows, as shown in the chart below.

FIGURE 5:
Average Venue Capacity, Canada 2023



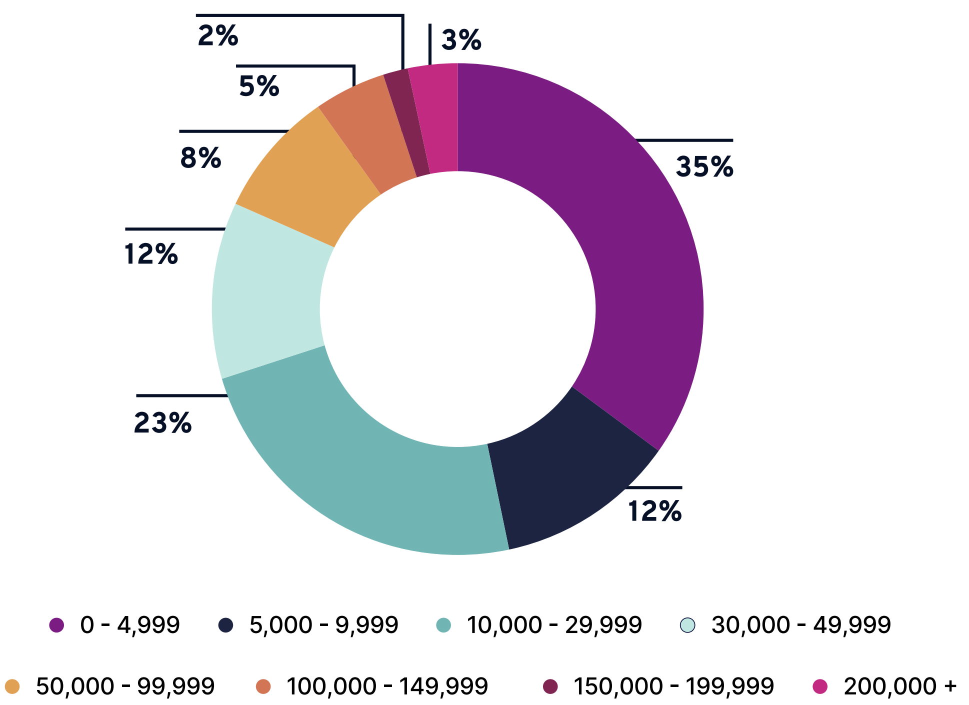
n=43
Source: Nordicity, Hear and Now Survey

Survey results indicate that venues in Canada hosted an average of 119 shows each in 2023, with an average fill rate of approximately 64%. Considering the venue capacities cited above, the average seated live music show in Canada attracts an estimated 152 attendees, and the average standing show approximately 160 attendees.

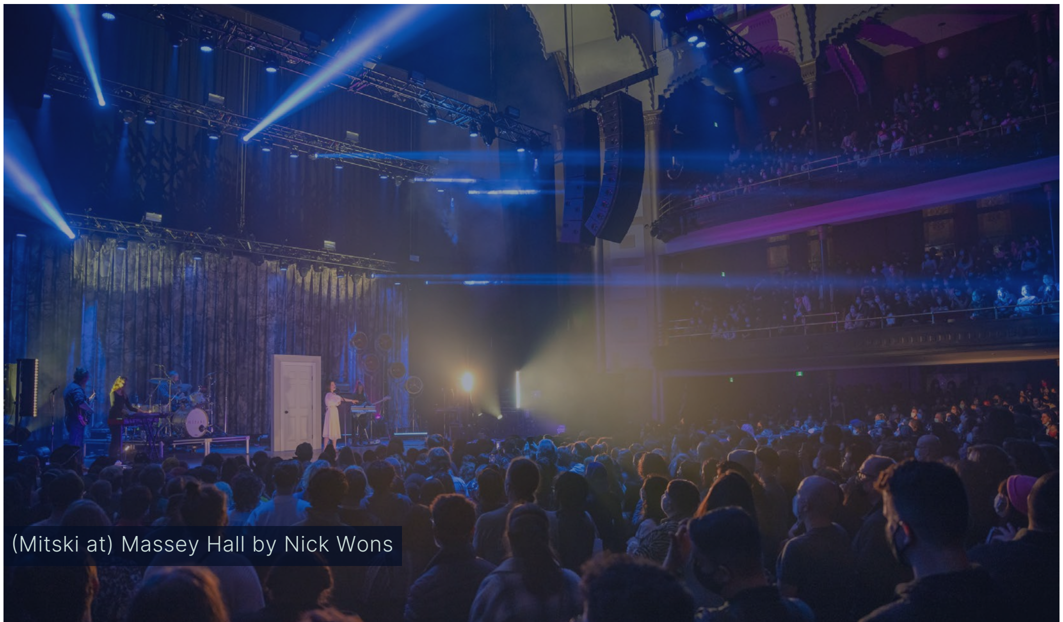
Festivals, events and award shows in Canada vary greatly in capacity and length. In 2023, festivals, events, and award shows are estimated to have hosted a total of 10.02 million attendees, with an estimated 59% of total attendees holding paid tickets.

Nearly half (47%) of festivals, events, and award shows hosted less than 10,000 people in 2023, and more than one-third (35%) hosted between 10,000 and 50,000.

FIGURE 6:
Breakdown of Festivals, Events, and Award Shows by 2023 Attendance

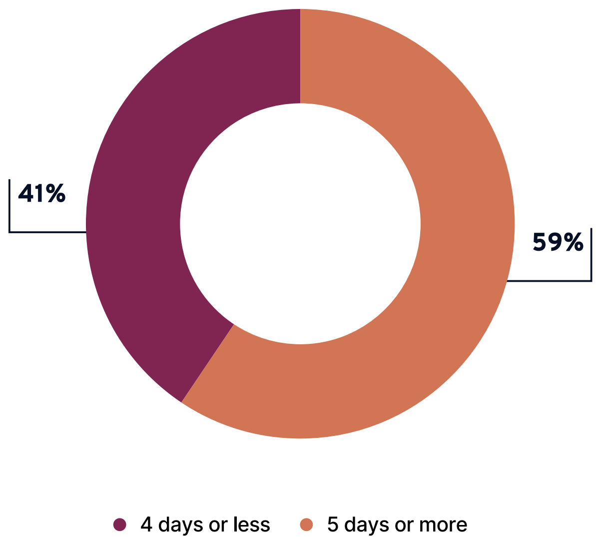


n=60
Source: Nordicity, Hear and Now Survey


(Mitski at) Massey Hall by Nick Wons

The majority (59%) of Canadian festivals, events, and award shows in 2023 were four days or less.

FIGURE 7:
Length in days of Canadian Festivals, Events, Award Shows in 2023



n=59
Source: Nordicity, Hear and Now Survey

These statistics set a baseline to track future trends in the scale and duration of live music events in Canada. With nearly half hosting fewer than 10,000 attendees, there appears to be a preference for more intimate gatherings, potentially reflecting shifts in audience engagement and logistical considerations. Additionally, the sizeable proportion that attracts between 10,000 and 50,000 attendees suggest a healthy mid-range event market. The predominance of shorter events lasting no longer than four days may indicate organizers' preference to maximize impact without overextending human and financial resources, more of which are required for events of a longer duration. Overall, these statistics highlight a live music industry that boasts broad diversity of event offerings in terms of size and duration.

3.3 **Nuances Across Regions**

As the live music asset map in Section 3.1 demonstrates, Canada's live music industry is as vast and diverse as the country's geography. Different regions in Canada experience the live music industry in different ways. For instance, a live music worker in Montreal exists in a very different industry context than a live music worker in Thunder Bay or Yellowknife.

Region-specific industry roundtable discussions were conducted to understand (qualitatively) more about the live music industry across Canada. The descriptions below do not necessarily provide a comprehensive account of the live music industry in each region, but rather highlight a few unique regional nuances that influence the shape and size of the industry in different corners of the country.

3.3.1 Ontario

Ontario is the largest music market in Canada, with Toronto sitting at the centre of Canada's music industry. Though Toronto remains the hub of live music in Ontario, music professionals noted in roundtable discussions that live music activities are increasingly moving into the sprawling suburbs of the Greater Toronto Area (GTA) and further into surrounding cities. Ontario municipalities like Mississauga,[39] Hamilton,[40] and London[41] have all taken concrete steps to build live music capacity to help them thrive as music cities independent of Toronto's pull. Respondents indicated that more and larger tours are choosing to make stops on the periphery of the GTA, which has helped increase the level of access that audiences in these markets can enjoy within their communities. The asset map (section 3.1) indicates that Ontario has a lower-than-average concentration per population of live music assets as compared to some other smaller Canadian markets, but this may be counterbalanced by the relatively larger size and capacity of many Ontario-based venues and businesses.

Respondents also considered Southern Ontario to be perhaps the most readily viable touring market in Canada for artists touring and small and medium-sized venues due to population density, the closeness of several large music markets, and the proximity to the United States.

That said, Ontario is home to a strong festival ecosystem that spans across the entire province – not just cities in Southern Ontario – and includes the Festival of Sound in Parry Sound and Wake the Giant in Thunder Bay, to name a few examples.

39 City of Mississauga. 2023. "Mississauga Music Strategy."
40 City of Hamilton. 2020. "Re:Venues: A Case for Hamilton's Live Music Industry."
41 City of London. N.d. "London City of Music."


Supercrawl by Mike Highfield

3.3.2 Quebec

Industry roundtable participants note that Francophone music makes up the most sought-after live music experiences in most of Quebec – particularly outside of Montreal. The emergence of a mainstream in Quebec Francophone music aligns with the goals of the provincial government's public support mechanisms in terms of funding for Francophone recording artists and live music activities. Like Ontario, Quebec's festival scene is also celebrated, with established festivals like Osheaga and newcomers like Lasso seeing resounding success.[42] Not only do festivals provide avenues to celebrate Quebec and Francophone culture, but they are an important training ground for emerging artists, organizers, promoters, technicians, agents, and other live industry positions.

3.3.3 British Columbia

British Columbia (BC)-based industry roundtable participants note the province's diversity in terms of cultural and ethnic backgrounds, music styles, regionality, and urban/rural split. The province's major population centres, like Greater Vancouver and Greater Victoria, have wellestablished music economies with mainstream industry representation, and can accommodate and attract major touring artists. Vancouver has a high proportion of "occasional" live music venues, per the asset map (section 3.1), which seems to track with the industry's continued vibrancy despite the ongoing development-driven loss of dedicated live music venues in the city.[43]

Meanwhile, local music is core to the cultural identity of many of BC's smaller communities, particularly in the interior and Vancouver Island regions. One industry professional described the rural BC music community as a "mushroom" ecosystem, where new music events and summer festivals continue to pop up nearly every year, and are embraced by their communities with a sense of local pride. Roundtable participants also note that BC's diverse topography makes it particularly harder for smaller markets like Northern BC and the Gulf Islands to access supplies and infrastructure for live music activities. Smaller and more remote communities often rely on their own resourcefulness and creativity in terms of resource sharing and collaboration.

42 Canada Billboard. 2024. "SZA, Tyla, Green Day, RAYE & More: Highlights From Osheaga 2024."
43 CTV News. 2023. "Vancouver artist creates open-source map of lost spaces, struggling community latches on."

Winnipeg Folk Festival by April Carandang

Canadian concert bookers and promoters booked an estimated 18,945 live music shows in Canada in 2023 – which, conservatively translates to approximately 50 shows per day across the country.

3.3.4 Prairies (Alberta, Saskatchewan, Manitoba)

Industry roundtable participants from the Prairie provinces of Alberta, Saskatchewan, and Manitoba note a prominent DIY and entrepreneurial energy across the Prairies, where artists support one another and collaborate across genre and medium. These activities lean on local supports such as strong industry associations and a core group of local promoters in each city. The asset map (see section 3.1) reveals a comparatively strong presence of industry associations and other live music professional support roles (e.g., promoters) across the Prairies, particularly in Alberta and Manitoba, indicating strong employment impacts from live music in those provinces, even outside dense population centres. While industry roundtable participants indicate a shortage of dedicated live music venues, the asset map indicates that the Prairies, like BC, also have a high proportion of "occasional" live music venues and music festivals, particularly in Manitoba and Saskatchewan. This use of "occasional" spaces aligns with the DIY and entrepreneurial Prairie ethos that roundtable participants referenced.

As migration continues to bring more newcomers west, industry roundtable participants note that genre lines denoting what constitutes "Prairies music" are changing. While country, rock, and folk remain prominent genres, industry roundtable participants have observed increasing diversity of genre in cities across the Prairies, such as an emerging afro-beat scene built around a growing Black music community. Given a smaller music market in the Prairies, roundtable participants note that there are fewer major tour stops – particularly in Manitoba and Saskatchewan – and the distance from other major urban markets tends to reduce the likelihood of proximity bookings.

3.3.5 Atlantic Canada

The Atlantic provinces of Nova Scotia, New Brunswick, PEI, and Newfoundland and Labrador each have their own distinct character and cultures. However, together they form a cohesive Atlantic Canadian music scene, where both audiences and artists frequently travel and perform throughout the region. Atlantic Canada can struggle to secure tour dates from major artists due to cost and market access issues, which has in turn helped foster a strong community of local artists. Industry roundtable participants note that

Folk On The Rocks by uplift media

there is a strong audience appetite and support for local artists, opening opportunities for those artists to establish themselves across the Atlantic provinces as 'regional stars.' While some of these artists may eventually leave Atlantic Canada for larger markets, many do remain to build careers within the region. Strong local and regional festival culture is also an identified market opportunity from May to September. Larger cities like Halifax and Fredericton are particularly viable touring markets with their large post-secondary student communities. The strong presence of music industry associations helps to support small-market touring and foster local and regional talent. In particular, industry roundtable participants note that New Brunswick's large Francophone community brings linguistic and musical diversity to the Atlantic Canadian music scene, while also presenting unique policy challenges related to dispersing funding support along two linguistic streams. Meanwhile, Prince Edward Island and Newfoundland and Labrador both enjoy a higher-than-average concentration of live music assets, perhaps owing in part to dedicated cultural venue funding initiatives like the Performance Venue Grant in PEI and the Arts Infrastructure and Programming Fund in Newfoundland and Labrador.[44]

44 Government of Newfoundland and Labrador. N.d. "Funding Programs – Culture." Statistics on how many venues take advantage of the grants is an area for future research.

3.3.6 Northern Canada (Yukon, Northwest Territories, Nunavut)

The live music industry in Canada's Northern territories thrives on the resilience and creativity of local communities. Northern Canada-based industry roundtable participants refer to their live music scene as a supportive network of "dreamers and doers," helping to make it more accessible for emerging artists. Compared to their counterparts in the South, the experiences of live music workers in Northern communities are grounded in the reality of their remote geography, often contending with the high cost of touring through Northern markets, limited broadband access, and extreme weather events impacting supply lines. Industry roundtable participants note a prevailing spirit of collaboration and resourcefulness whereby Northern live music workers adopt a "rising tide lifts all boats" mentality to achieve a thriving live music ecosystem, navigating logistical hurdles by supporting one another, such as by sharing resources and equipment through social media platforms. In terms of live music assets, as compared to the provinces each of the three territories maintains a very high proportion of live music assets as a function of their population, suggesting a strong continued focus on preserving vibrant community cultural experiences.

Some emerging artists are forced to confront limited growth opportunities by moving from the North to larger markets to the South, but generally roundtable participants note strong local support for artists to thrive in their own environments. Meanwhile, one participant offered that "festivals aren't just festivals up here," noting a high level of outreach and community organizing that takes place alongside musical elements. Many artists and organizers also embrace a multidisciplinary approach in their festivals and event programming, blending live music with visual arts and other arts offerings, which enriches audience engagement while harnessing the strength of arts workers in other industries.

3.4 **Music in Indigenous Communities**

Indigenous communities are as vast and diverse as the country itself. However, there are several key similarities in the experiences of Indigenous music workers seeking to build capacity within their own communities and to penetrate the mainstream industry. While many successful Indigenous artists have found ways to chart their own path within a majority settler music ecosystem, there is also a growing Indigenous-led segment of the music industry. Inroads made by organizations like the Indigenous Music Office and Indigenous-led record labels like Land Back Records, Red Music Rising, and Ishkōdé Records are helping to create new and larger opportunities to lift up more Indigenous artists, both in the recorded and live industries. Streaming and other emerging discovery tools like TikTok have also been instrumental in creating opportunities for Indigenous artists to break out, especially those from remote, northern, and/or rural reserve communities. Though there are various non-economic ways to measure the value of cultural works, APTN found in 2018 that Indigenous music alone contributes almost $78 million to Canada's GDP annually.[45]

In terms of more traditional Indigenous music activities, such as powwow, Indigenous music industry professionals note a gulf between the "capitalist extractive" model of measuring music activities in terms of economic output, and traditional Indigenous models of understanding the value of music in community – which are not as easily measured. There is often a dollar value associated with traditional music activities, but measurement of that value alone misses the deep social and intrinsic value that those activities bring to community (e.g., by accompanying drum dance, hand games, and other cultural experiences). Roundtable participants also identified a false dichotomy between traditional and commercial music activities in Indigenous communities; with enhanced access to the commercial music industry, creators and purveyors of traditional Indigenous music would also embrace opportunities to find commercial success.

Overall, Indigenous roundtable participants emphasize the unique role that Indigenous artists and music professionals play within the live music ecosystem. This role is centered on telling the stories of the first peoples of this land and affirming national sovereignty. Indigenous artists and professionals are uniquely equipped to showcase these cultural narratives, bringing forward facets of expression that affirm their identity and sovereignty, thus carving out a significant and distinct presence in the industry.

3.5 **Financial Profile: Industry Revenue, Expenses, Labour**

Canada's live music industry is an economic driver, generating revenue, and contributing to labour in the country. This section outlines a financial profile of the live music industry in Canada, highlighting its revenue, expense patterns, and certain labour dynamics. Examining these components will help show the financial and workforce environment that informs the industry's overall economic impacts.

Drake Underground by Louisa Nicolau

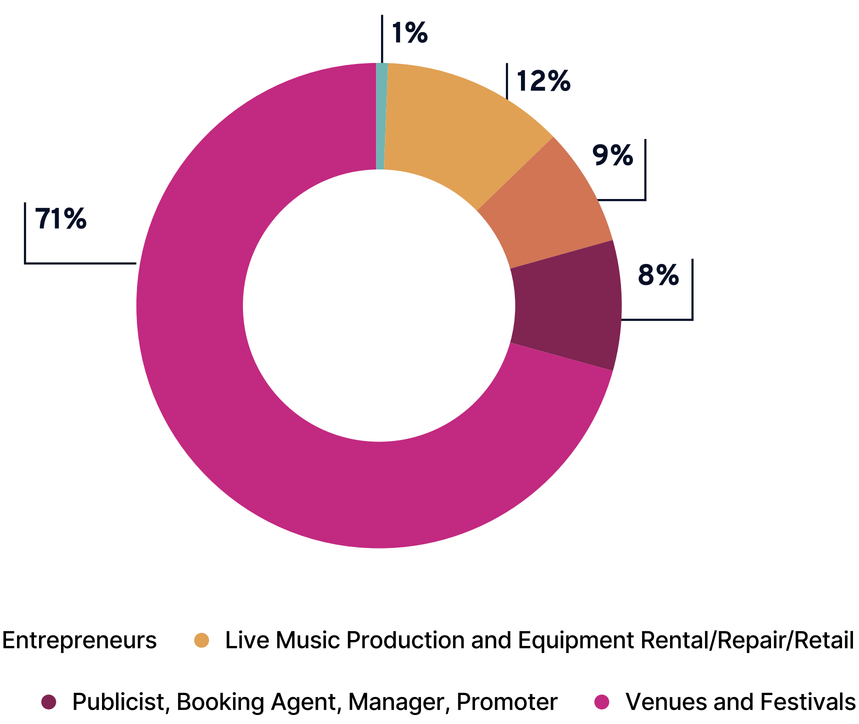
45 APTN. 2018. "National Indigenous Music Impact Study."

3.5.1 Revenue

Through extrapolating the data gathered in the Hear and Now Survey, Nordicity estimates that **live music companies (including for-profit and non-profit) in Canada earned a total of $1.88 billion of revenue in 2023**. This total is made up of revenues from five different types of companies, with venues and festivals making up 70%. The differences seen in these percentages are due to the nature of these businesses. For example, venues and festivals are able to generate revenue from multiple revenue streams beyond ticket sales, such as food and beverage services, merchandise, sponsorships, and more; artist entrepreneurs rely on performance fees, which can be a fixed portion of ticket revenue, and can be limited by the frequency of performances, audience reach, and demand for their music. Therefore, this data implies that a company's revenue potential depends on its type, and that not all companies have the same earning potential.

The chart below provides a visual representation of how the different live music company or organization types in Canada contributed to the industry's total 2023 revenue.

FIGURE 8:
Breakdown of 2023 Live Music Revenue Share by Company/Organization Type [46]



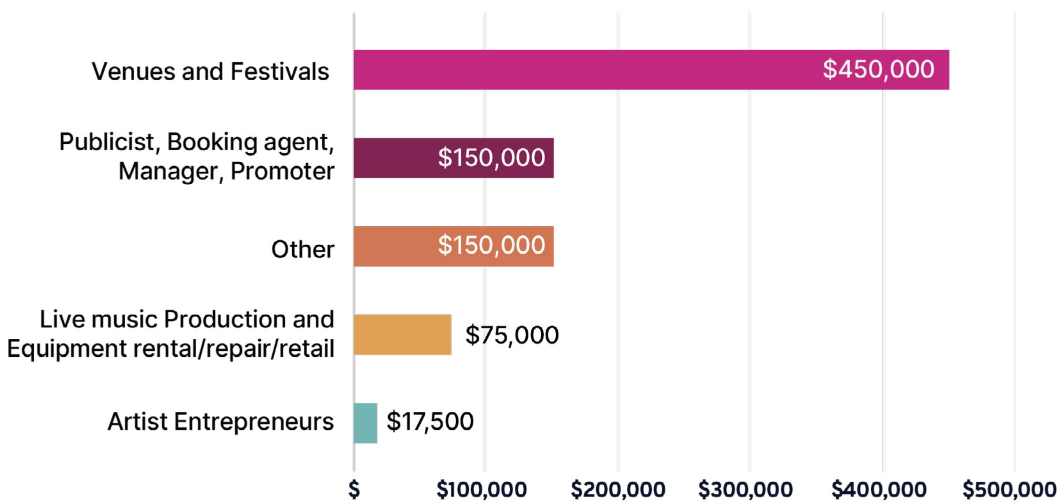
n=392
Source: Nordicity, Hear and Now Survey

46 Note that organizations categorized as "other" include trade and industry organizations, professional associations, consultancies, and multi-faceted companies.

In 2023, festivals and venues had the highest median revenue at $450,000 for the year, while artist entrepreneurs had the lowest median revenue in 2023, at $17,500. These stark revenue differences suggest that a significant portion of revenue in live music flows to companies who deal directly with audiences and attendees – indicating that the closer a company can get to the audience, the more revenue potential they may have.

The chart below provides a visual representation of median annual 2023 revenue for the various types of live music companies and organizations in Canada.

FIGURE 9:
Median Annual Company Revenue (2023), by Category

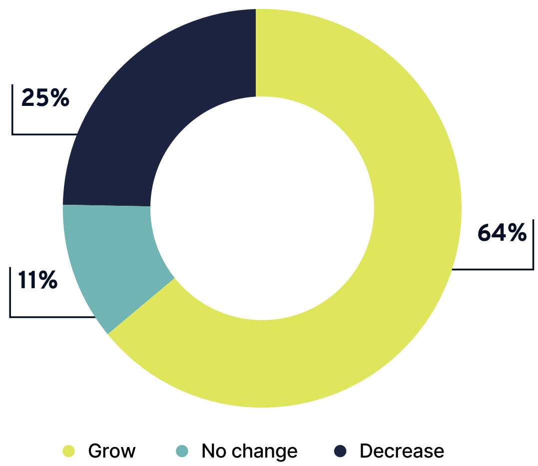


n=392
Source: Nordicity, Hear and Now Survey

There has been variation in revenue levels between 2023 and the previous year. Approximately **64% of companies saw growth in revenue between 2022 and 2023**, with over one-third of those (34%) reporting growth of 25% or more, an indication of a highly resilient industry that has worked to re-establish services and operations following years of disruption. The chart below shows how the revenue of live music companies in Canada changed between 2022 and 2023. This growth can be attributed to many factors but is likely (at least partially) to be the result of continued re-building in the post-pandemic years, as the availability of live music-related events and services returned and rebounded. An additional likely contributor is inflation, considering Canada's Consumer Price Index (CPI) rose 3.9% in 2023.[47]

47 Statistics Canada. 2024. "Consumer Price Index: Annual review, 2023."

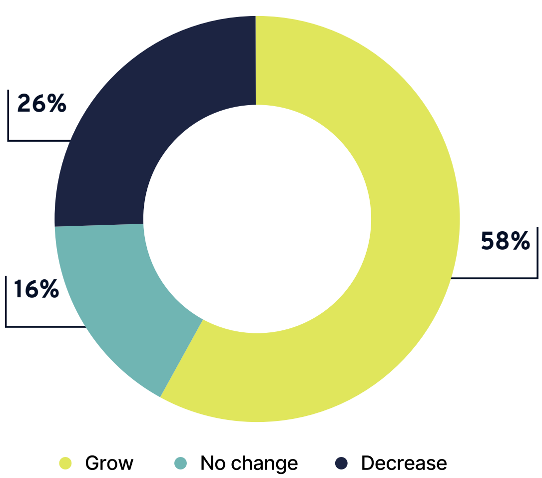
FIGURE 10:
Change in Live Music Companies' Revenue, 2022 to 2023



n=433
Source: Nordicity, Hear and Now Survey

In addition, the majority of **live music companies in Canada expect their final 2024 revenue to grow again**; however, it is important to note that growing revenues may not translate to increased spending, as companies face ongoing economic uncertainty (see section 3.5.3 Labour for additional discussion). Over half (58%) of live music companies expect their final 2024 revenue to grow as compared to 2023 revenue, with one-fifth of those companies expecting revenue growth of 25% or more. Conversely, a combined 42% of companies expect no revenue change or a decrease in revenue, while half of those companies expecting revenue growth in 2024 forecast growth of 10% or less. The chart below provides a visual representation of how live music companies' revenue is expected to change between 2023 and 2024.

FIGURE 11:
Expected Change in Live Music Companies' Revenue, 2023 to 2024



n=433
Source: Nordicity, Hear and Now Survey

Shambhala Music Festival by Brette Culp

For-profit and non-profit live music companies in Canada earned a total of $1.88 billion of revenue in 2023

Generally, these revenue growth trends may indicate economic recovery and rebounding consumer demand in the live music industry. The global trend of consumers prioritizing experiences, entertainment, and leisure over other expenses, known as the "experience economy," is likely a significant contributor to the improving consumer demand.[48]

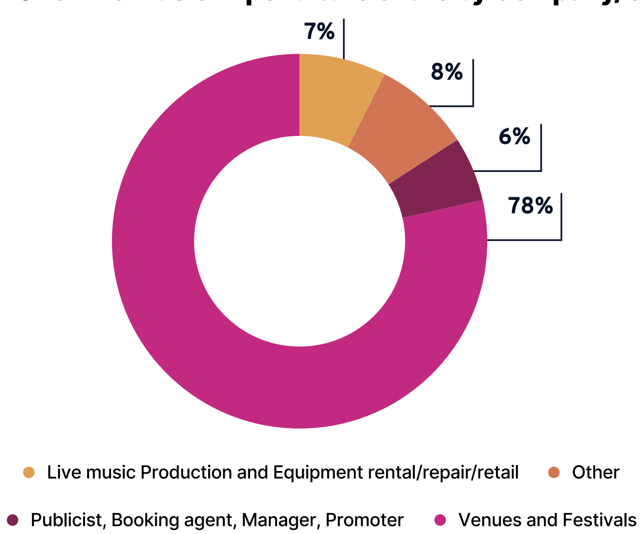
However, revenue increases might reflect companies' need to adjust their pricing to cover higher operations costs as a result of high inflation rates in the post-pandemic years. Inflation can also lead to higher selectivity on the consumer side, which could lead to future revenue fluctuations in the future. As the live music industry continues to rebuild, companies in the industry may need to explore innovative strategies to offset economic pressures which tend to temper consumer enthusiasm.

3.5.2 Expenses

Nordicity estimates that live music companies (including for-profit and non-profit) spent a total of $1.65 billion in 2023. Expenses from festivals and venues together accounted for the largest share, at approximately 79%, while artist entrepreneurs accounted for the smallest share, at less than 1%. Keep in mind that a company's operational expenses depend on the type of business it is (e.g., festival), and not all companies should or need to spend the same amount. For example, it costs significantly more to run a festival or operate a venue than it does to run a live music management firm.

The chart below provides a visual representation of how different live music company/organization types in Canada contributed to the industry's total 2023 expenditures.

FIGURE 12:
Breakdown of 2023 Live Music Expenditure Share by Company/Organization Type



n=392
Source: Nordicity, Hear and Now Survey

48 Bloomberg. 2024. "Sports and Music Tourism Will Soon Represent a $1.5 Trillion Economy."

The largest share of 2023 live music expenses went to employee wages and benefits and programming costs, followed by event costs, tech rental, marketing, rent, and expenses categorized as "other." The table below provides a breakdown of total 2023 expenses by expense category.

TABLE 4:
Breakdown of Total 2023 Live Music Industry Expenses, by Expense Type

Expense Category	% of Total
Employee wages and benefits	29.05%
Rent	4.33%
Utilities	1.87%
Marketing	5.62%
Travel	0.35%
Accommodation	0.14%
Insurance	2.10%
Purchase of fixed technology (e.g., lighting, sound equipment)	2.11%
Rental of fixed technology (e.g., lighting, sound equipment)	6.41%
Licensing costs (e.g., SOCAN)	1.08%
Facility maintenance costs	2.74%
Ticketing	2.13%
Bar and/or restaurant costs	3.98%
Artist development	1.59%
Programming costs (i.e., paying artists)	18.18%
Other event costs	9.58%
Other professional services	3.10%
Real estate services	0.32%
Other expenses	5.32%

Source: Nordicity, Hear and Now Survey

The nature of companies' or organizations' annual expenditures vary depending on type. For example, in 2023, all organization and company types spent the largest share of their total expenses on Canada-based labour; however, live music production companies and equipment rental/repair/retail companies spent 47% of their expenses in this category while artist entrepreneurs spent less than 30% of their expenses in this category. Venues and festivals spent the lowest share of their total expenses on Canada-based labour, but conversely spent one of the highest shares on programming costs (20%) out of all company types. Publicists, booking agents, managers, and promoters spent an estimated 22% of their total expenses are programming costs (i.e., paying artists), which is the highest proportion of expenses paid in this category out of all company types.

The table below provides a breakdown of expenses for different live music company types in Canada in 2023.

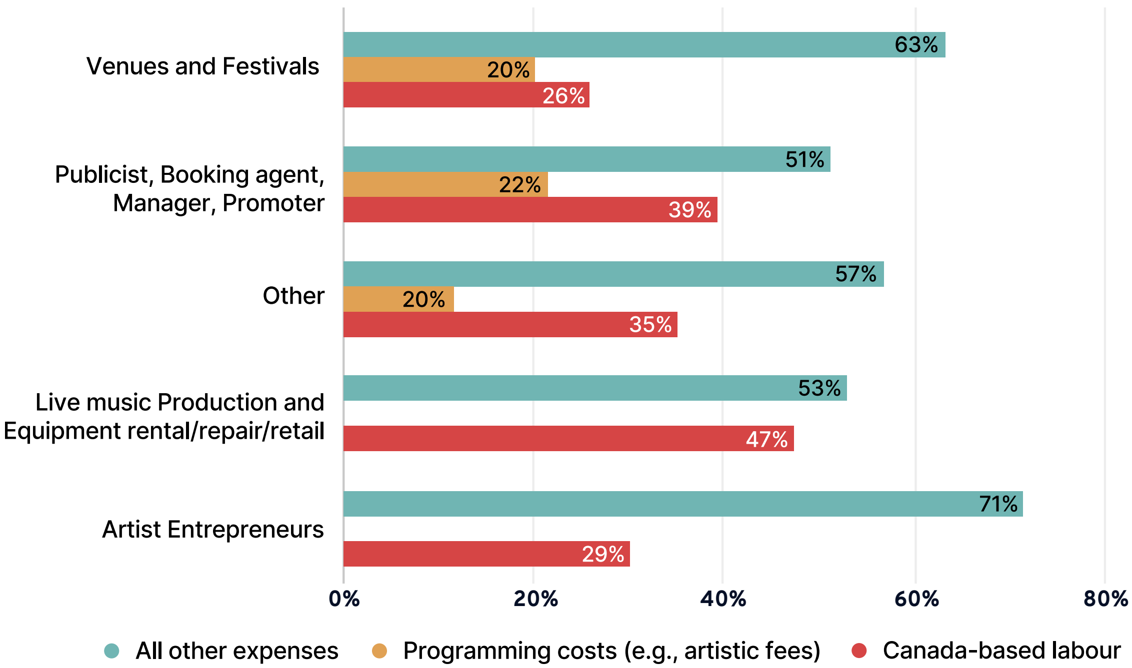
TABLE 5:
Expense Breakdown of Live Music Companies, Canada 2023

	Artist Entrepreneurs	Live music Production and Equipment rental/repair/ retail	Publicist, Booking agent, Manager, Promoter	Venues and Festivals	Other
Canada-based labour	29%	47%	39%	26%	35%
Rent		9%	7%	3%	8%
Utilities			1%	2%	1%
Marketing	11%	6%	10%	5%	10%
Travel	15%		2%		3%
Accommodation	7%		1%		1%
Insurance	5%	4%	1%	2%	2%
Tech purchase		4%		2%	
Tech rental	5%	13%		7%	4%
Licensing (e.g. SOCAN)				1%	1%
Facility maintenance				3%	1%
Ticketing	2%			3%	
Bar and restaurant costs	2%			4%	6%
Artist development				2%	
Programming costs			22%	20%	12%
Event costs			9%	11%	8%
Professional services	11%	2%	2%	3%	4%
Real estate services					1%
Other expenses	14%	14%	4%	5%	4%

Source: Nordicity, Hear and Now Survey
Note: blank cells indicate expense categories that were not relevant for certain respondent types.

Canada-based labour and programming costs combined represents the largest expense category for all company types in Canada. Client-facing companies and organizations (publicists, booking agents, managers, and promoters) spend the highest proportion of their annual expenses on Canada-based labour and programming costs, at a combined 61%. Artist entrepreneurs spent the smallest proportion of their annual expenses in these two categories, at 29%. The chart below provides a visual representation of the proportion of companies' expenditures dedicated to Canada-based labour and programming costs.

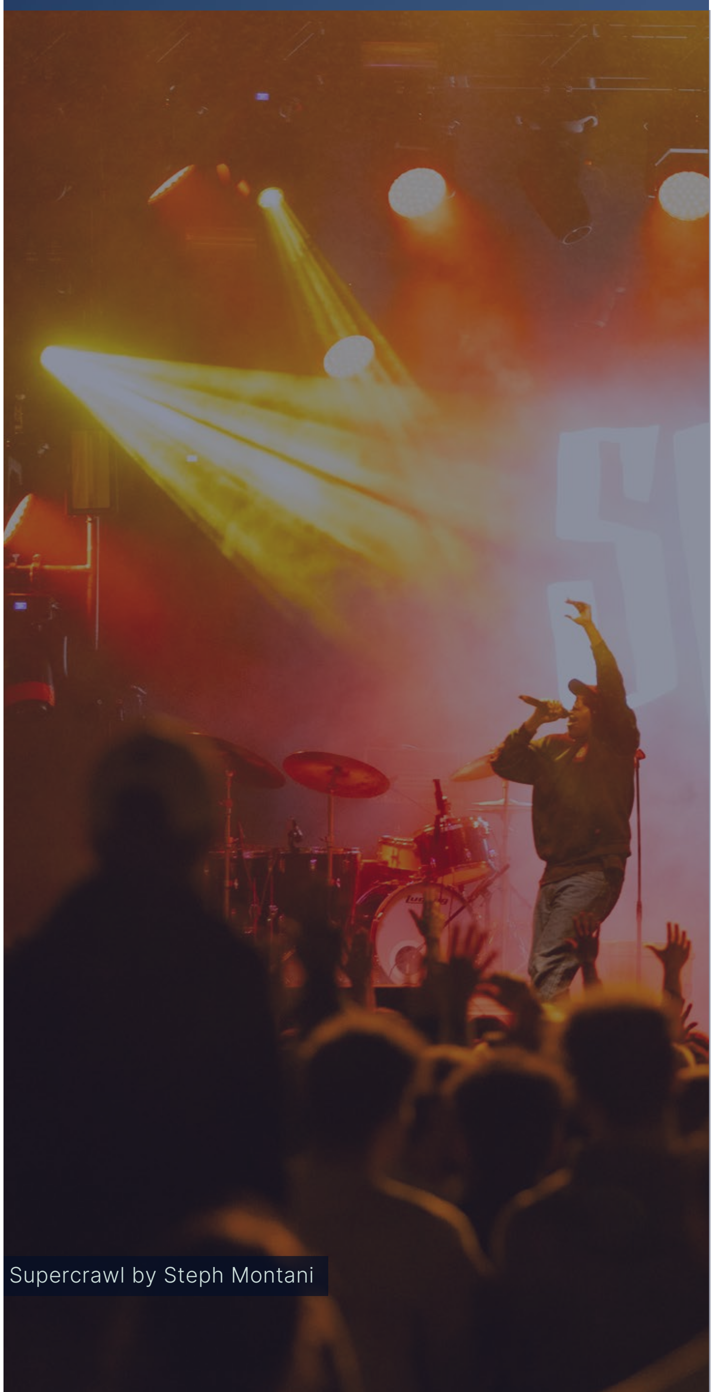
FIGURE 13:
Labour and Programming Expenses of Live Music Companies, Canada 2023



This distribution of expenses, with its substantial concentration in labour and programming across all company types, highlights the importance of human resources in the live music industry. Skilled personnel are essential in the execution of live music events and for the continued availability of services in the industry. Without skilled labour, the live music industry would likely struggle to maintain the standards that audiences and customers expect.


Fortune Sound Club by Brandon Artis

For-profit and non-profit live music companies spent a total of $1.65 billion in 2023



Supercrawl by Steph Montani

3.5.3 Labour

Labour represents the largest expense item in total national expenditures (as discussed above) and is therefore a significant driver of economic activity for the live music industry in Canada. In 2023, it is estimated that the average salary for a full-time employee in the Canadian live music industry is slightly more than $31,000. This figure describes salary only, and does not include any compensation associated with benefits, bonuses, or other compensation vehicles. According to Statistics Canada, the average Canadian income in 2022 was $57,100 with a median income of $43,100,[49] both of which are higher than the estimated average salary for a full-time worker in the Canadian live music industry. This finding implies Canadian live music workers bring home a lower salary than the average worker in Canada. Indeed, this salary level falls under the official Canadian poverty threshold,[50] implying that many full-time live music workers in Canada are likely to in poverty, especially in areas of the country with higher cost of living (such as Toronto and Vancouver).

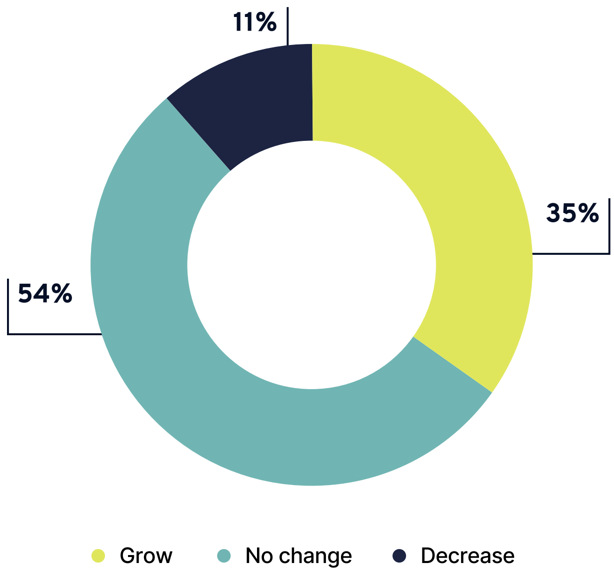
As competition for talent intensifies, especially in a recovering industry, companies may need to prioritize employee well-being and professional development. By fostering a supportive work environment, and offering more competitive compensation, live music companies may be able to attract and retain the human resources necessary to not only sustain their operations, but to drive innovation, and contribute to industry growth as a whole.

Well over one-half (54%) of live music companies indicate no expected change in headcount (defined as the number of people employed at a company) from 2023 levels, and over one-third (35%) expect their headcount to increase. Of those companies who expect their headcount to grow, over half (55%) expect growth of 10% of less, but over a quarter (27%) expect growth of over 20%.

The chart below provides a visual representation of how companies expect final 2024 headcount to differ from 2023.

49 Statistics Canada. 2024. "Income of individuals by age group, sex and income source, Canada, provinces and selected census metropolitan areas."
50 Statistics Canada. 2022. "Canada's Official Poverty Line."

FIGURE 14:
How Canadian Live Music Companies Expect 2024 Headcount to Change Compared to 2023



With the majority of companies forecasting either no change or modest change to their headcount, the live music industry as a whole seems to be making only slight increases at most to sustain operations or support slight, gradual growth. This conservative approach may be the result of uncertain economic conditions and suggests a focus on maintaining momentum and cautious incremental improvement, rather than fast expansion. However, with the right support and incentives in place, the live music companies who expect growth may be able to accelerate their hiring plans and boost overall productivity, potentially driving greater activity and output across the industry.


(Run the Jewels at) Rifflandia Festival by Laura Harvey

Xeroz Arcade/Bar by Iza Smith

Section IV:

IMPACTS OF LIVE MUSIC

Live music in Canada generates economic impacts that can be expressed in terms of gross domestic product, labour income, employment, and fiscal impacts (e.g., taxes).

These impacts come from expenditures related to live music company **operations** and **tourism**, and they are composed of direct, indirect and induced impacts.

Gross domestic product (GDP) is a key economic indicator that represents the total monetary value of all goods and services produced within a country. The activities of industries and organizations to produce goods and services contribute to a jurisdiction's GDP. **Labour income** is defined as total earnings or income received by workers as a result of a specific economic activity. Employment is expressed in terms of **full-time equivalent jobs** (FTEs), where an FTE is defined as someone who works a 40-hour work week, approximately 52 weeks per year. Importantly, employment impact is not a measure of the number of people employed. For the purposes of this project, **fiscal impact** is the sum of estimated personal income taxes, corporation income taxes, consumption taxes, property taxes, and other fees; fiscal impacts are expressed at the federal and provincial, levels, and total fiscal impact is the sum of the above.

The main source of direct economic impact in any economy is money paid to or generated by **individuals**. As such, the **direct impact** contributed by any entity comes from salaries and wages paid to employees, as well as any profits it earns from its operations.
In addition to the direct impact, economic activity also has two key types of **ripple effects** on the broader economy. These include:

- **Indirect impacts:** the employment, labour income, GDP, and fiscal impacts generated within the supply chain, as businesses purchase goods and services to support their operations, and
- **Induced impacts:** the employment, labour income, GDP, and fiscal impacts generated by workers (i.e., those who have earned income at the direct and indirect impact stages) spending their wages on everyday goods and services.


Joey Bada$$ at MRG Concerts by Bruno Martin Del Campo

The sum of the direct, indirect, and induced economic impacts is the total economic impact.

Live music company operations and tourism spending related to live music contributed the following economic and fiscal impacts in Canada in 2023:

TABLE 6:
Summary of Economic and Fiscal Impacts of Live Music, 2023

Category	Live Music Operations	Tourism	Total Impact (Operations + Tourism)
Employment (FTEs)	27,490	77,150	**101,640**
Labour Income	$1.17 billion	$4.67 billion	**$5.84 billion**
Gross Domestic Product	$2 billion	$8.92 billion	**$10.92 billion**
Fiscal	$514 million	$3.21 billion	**$3.73 billion**

Note: figures may not sum exactly due to rounding.

The subsections below detail the economic and fiscal impacts of live music company operations and tourism.

4.1 **Economic Impacts – Live Music Operations**

The economic impacts of live music companies' operations in Canada are significant. As discussed above, live music companies spent an estimated $1.65 billion in 2023; the total GDP impact of this expenditure is an estimated $2 billion. According to Statistics Canada, the national contribution from all culture and sport in 2023 was $60.8 billion[51], implying that live music operations contributed approximately 3.3% of Canada's culture and sport GDP impact.

Other economic impacts of live music company operations are summarized in the table below.

TABLE 7:
Economic Impacts of Live Music in Canada in 2023

	Direct Impact	Indirect Impact	Induced Impact	Total Impact
Employment	27,490	77,150	**101,640**	**27,490**
Labour Income	$479,576,000	$475,844,000	$213,249,000	**$1,168,669,000**
Gross Domestic Product	$712,598,000	$813,512,000	**$473,888,000**	**$1,999,998,000**

Source: MyEIA™

51 Statistics Canada. 2024. "National culture and sport indicators by domain and sub-domain."

The total labour income impact of live music company operations in Canada was an estimated *$1.17 billion* and the total employment supported by these operations is an estimated *27,490 FTEs*. Live music company operations directly employ 15,350 FTEs and support 12,140 indirect and induced FTEs.

Live music company operations also contribute fiscal impacts, as summarized in the table below.

TABLE 8:
Fiscal Impacts of Live Music in Canada in 2023

	Federal ($)	Provincial ($)	Total ($)
Personal Income Taxes	170,532,000	103,550,000	**274,082,000**
Corporation Income Taxes	48,159,000	30,587,000	**78,746,000**
Consumption Taxes	46,087,000	64,786,000	**110,873,000**
Local Property Taxes and Other Fees	0	49,836,000	**49,836,000**
Total	**264,778,000**	**248,759,000**	**513,537,000**

Source: MyEIA™

Live music companies contribute to tax revenue at the federal and provincial levels. Personal income taxes, corporation income taxes, consumption taxes, local property taxes, and other fees together contributed an estimated $264.78 million at the federal level and $248.76 million at the provincial level, yielding an estimated **$513.54 million in total fiscal impact** in 2023.


West End Cultural Centre by Matt Duboff-Faouzia

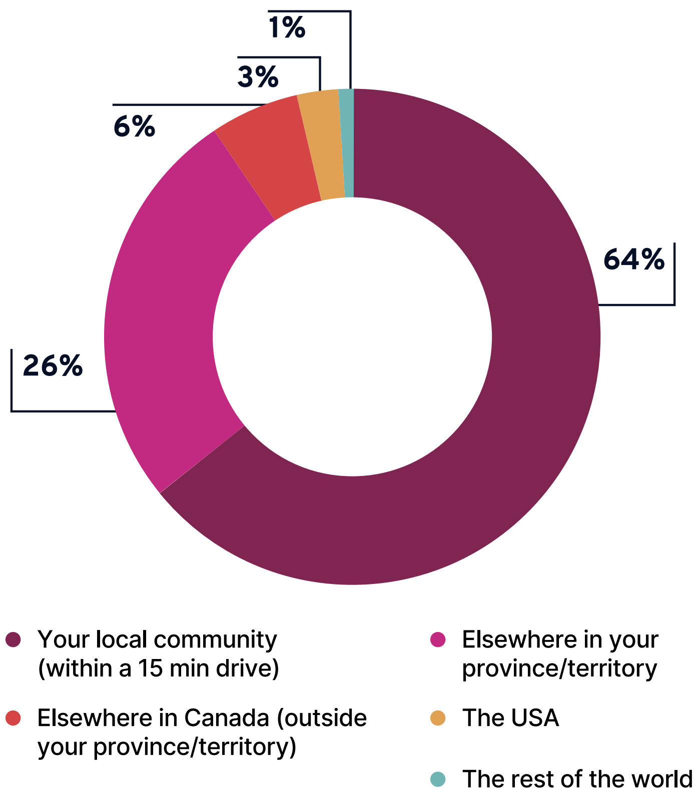
4.2 **Economic Impacts – Tourism**

Live music in Canada is a driver of tourism. The spending associated with live music tourism represents significant economic impacts.

The majority (64%) of people who attend live music events do so within their local community, and 36% travel from outside of their local community to do so. Of that 36% who travel to live music events, the majority travel within their own province or territory. Overall, an estimated 4% of attendees at live music events in Canada travelled internationally to do so, and 6% travel interprovincially.

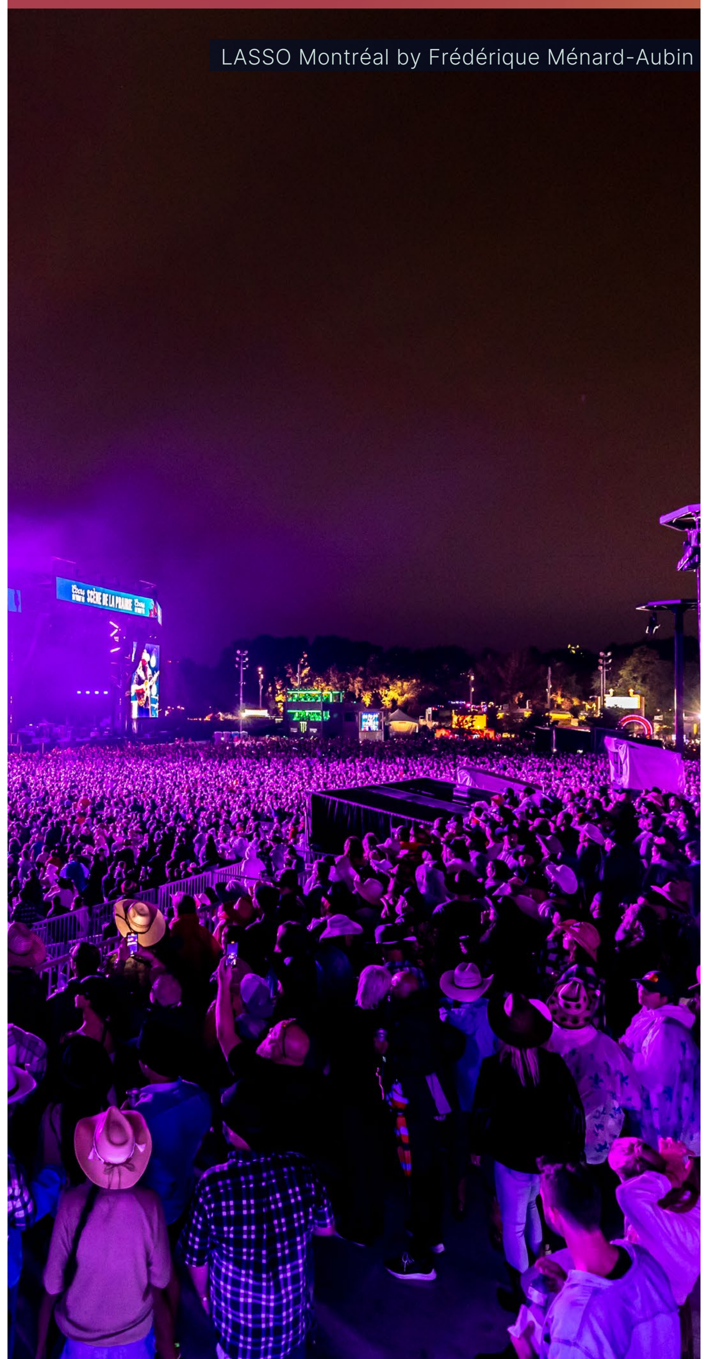
The chart below provides a summary of where live music event attendees travel from.

FIGURE 15:
Origin of Attendees for Canadian Live Music Events



n=182
Source: Nordicity, Hear and Now Survey

Live music festivals and live shows at venues in Canada together saw a total of 19.7 million non-local visitors.



LASSO Montréal by Frédérique Ménard-Aubin


Cavendish Beach Music Festival by Al Douglas

In 2023, it is estimated that live music festivals and live shows at venues in Canada together saw a total of 19.69 million non-local visitors. Using the above provenance statistics, it is estimated that 0.55 million were international visitors, 1.47 million were visitors from the United States,

3.18 million travelled interprovincially, and 14.50 million travelled intra-provincially.

Visitors spend money while travelling. Using a combination of survey data and statistics available through the National Travel Survey, the Visitor Tourism Survey, and the National Tourism Indicators, visitor spending associated with live music tourism is estimated to be $9.90 billion in 2023, or approximately 10.8% of total tourism expenditures in Canada for the year.[52]

The table below provides a breakdown of this figure in terms of spending on food and beverage, accommodations, transportation, culture and recreation, and other expenses.

TABLE 9:
Visitor Spending Attributable to Live Music in Canada, 2023 (x 1000)

	Food and Beverage ($)	Accommodation ($)	Transportation ($)	Culture and Rec ($)	Other Expenses ($)
International visitors	260,380	266,686	180,193	81,087	112,621
US Visitors	227,685	266,539	101,020	69,937	111,900
Interprovincial visitors	252,599	262,939	302,823	73,859	584,966
Intraprovincial visitors	1,152,887	1,200,081	1,382,116	337,102	2,669,844
Sub-totals	**1,893,550**	**1,996,246**	**1,966,153**	**561,985**	**3,479,330**
Total	**9,897,265**				

Source: Nordicity, Hear and Now Survey; National Travel Survey; Visitor Tourism Survey; National Tourism Indicators Note: Numbers may not sum exactly due to rounding

The economic impacts of this tourism spending are significant, with an estimated total GDP impact of $8.92 billion. Other economic impacts of live music related tourism spending are summarized in the table below.

52 Statista. 2024. "Tourism expenditure in Canada from 2010 to 2023."

TABLE 10:
Economic Impacts of Live Music Related Tourism Spending

	Direct Impact	Indirect Impact	Induced Impact	Total Impact
Employment (FTEs)	41,780	20,900	14,470	**77,150**
Labour Income	$2,202,809,000	$1,537,857,000	$929,544,000	**$4,670,210,000**
Gross Domestic Product	$3,407,464,000	$3,443,429,000	$2,065,653,000	**$8,916,546,000**

Source: Nordicity, customized tourism EIA model

The total labour income impact of live music related tourism spending in Canada was an estimated $4.67 billion and the total employment supported is an estimated 77,150 FTEs. Live music related tourism spending directly employs 41,780 FTEs, and supports 35,370 indirect and induced FTEs.

Live music related tourism spending also contributed to fiscal impacts, as summarized in the table below.

TABLE 11:
Fiscal Impacts of Live Music Related Tourism Spending

	Federal ($)	Provincial ($)	Total ($)
Personal Income Taxes	681,478,000	413,803,000	**1,095,281,000**
Corporation Income Taxes	245,991,000	156,234,000	**402,225,000**
Consumption Taxes	809,864,000	684,649,000	**1,494,513,000**
Local Property Taxes and Other Fees	0	222,185,000	**222,185,000**
Total	**1,737,333,000**	**1,476,871,000**	**3,214,204,000**

Source: Nordicity, customized tourism EIA model


Photo courtesy of Commonwealth Bar & Stage

Notably, the World Travel and Tourism Council is forecasting historically high tourism industry activity for 2024, with domestic and international visitors expected to spend a combined total of $139 billion.[53] This finding, when combined with live music companies' expectation that their 2024 revenue has grown compared to 2023, reasonably suggests that 2024 tourism spending related to live music is likely to be even higher than $9.9 billion – which in turn implies that the 2024 economic impacts from tourism related to live music are likely to be even higher as well.

53 WTTC. 2024. "World Travel and Tourism Council."

Bass Coast Festival by Ron Worobec

Orpheum Theatre by Bruno Martin del Campo

Section V:

STRENGTHS, CHALLENGES, TRENDS, AND NEEDS OF LIVE MUSIC IN CANADA

As evidenced throughout this report, live music is a unique segment of the music industry, one that is intricately connected to tourism, resulting in strong community and economic impacts. However, the industry is not without its ongoing challenges, facing threats to its continued growth and its contribution to the Canadian economy.

5.1 **Strengths**

In addition to the impacts discussed throughout this report, several unique high-level strengths of Canada's live music industry emerged through roundtable discussions and the national survey. These strengths include: a diversity of talent and genres, resilience and adaptability, community and collaboration, professional development and a supportive ecosystem, and international recognition and success. The following subsections describe these strengths, building upon insights gleaned through those roundtable discussions and responses to the national survey.

5.1.1 Diversity of Talent and Genres

The Canadian live music landscape thrives on its rich reservoir of local talent, where musically and culturally diverse artists emerge from communities across the country to find domestic and international success. Canada's live music scene is noted for its range of musical genres and cultural influences, driven by multiculturalism, and a variety of musical traditions from Indigenous, Black, immigrant, and

5X Fest by Ampliar Creative

First Light by Dan Smith

other culturally diverse communities. Many of these incredible talents find domestic and international success. Not only is this industry diversity important to capture the full range of cultural expression that exists in Canada, but as several roundtable participants noted, it is important for all people to see themselves represented in live music. Empowering the plethora of cultural communities to find and create new roles in the industry – such as by supporting Black and Indigenous-owned record labels and artist management firms – helps to increase access and participation in the music industry. This approach builds capacity within those communities, fostering a more inclusive and sustainable industry landscape.

Empowering diverse communities to find and create new roles in the industry – such as by starting Black and Indigenous-owned record labels and artist management firms – helps to increase access and participation in the music industry. This approach builds capacity within those communities, fostering a more inclusive and sustainable industry landscape. While certain styles of music might be assumed to be the primary domain of specific regional music scenes (e.g., country music in Alberta, folk music in Atlantic Canada, francophone music in Quebec), in reality, these boundaries are shifting and disappearing over time. Immigration and cross-provincial mobility contribute to a broadening spectrum of sounds and influences in all parts of Canada, as newcomers settle in their new communities and enrich the local scene. Festivals and events across the country also highlight an increasingly wide array of Canadian artists spanning multiple genres. A festival like Ottawa Bluesfest booking more folk, indie rock, country, jazz fusion, and hip-hop artists reflects an evolution in what is traditionally put on stage at mainstream festivals and events.[54]

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54 CBC. 2024. "Neil Young, Nickelback, Maroon 5 playing 2024 Ottawa Bluesfest."

This eclectic mix not only nurtures a vibrant ecosystem where artists can experiment and collaborate across genres, but also has broad audience appeal. Festivals connect artists with (new) audiences – a critical factor to advancing their career. Artist development contributes to the sustainability and growth of jobs across the whole live music industry.

The accessibility of music production and music discovery tools is also leading to a proliferation of new sounds and styles from a mix of DIY and mainstream artists. Nevertheless, Canada's vast and diverse geography also means that music will often be characterized by a strong sense of place and belonging, whereby artists will seek to maintain their unique regional identity. This deep connection to community enhances the authenticity and regional diversity of Canadian music. The unique blend of cultural identities, landscapes, and regional variations in Canada contributes to a distinctive music ecosystem that reflects the country's diversity and the diversity of the industry.

5.1.2 Resiliency and Adaptability

As noted in industry roundtables, the Canadian live music community is a uniquely resilient group in the face of persistent challenges. From public health and climate emergencies to financial pressures and dwindling availability of established music spaces, live music workers are continually striving to find ways to adapt to changing conditions and make things happen to sustain their industry.

The COVID-19 pandemic forced live music workers to embrace huge and immediate innovation in order to preserve their livelihoods, including reconfiguring live music venues for public health safety measures, shifting events to online or outdoor spaces, and launching national campaigns to protect venues such as the #ForTheLoveOfLIVE campaign. Live music workers, live music companies, and artist entrepreneurs financially rebounded after the pandemic, continuing to find ways to earn revenue, drive output, and contribute heavily to the economy – as evidenced by the estimated $1.17 billion in labour income, $2 billion in GDP, $514 million in fiscal impacts, and over 27,000 full-time equivalent jobs in 2023 (see section 4). The steadily increasing revenue seen in recent years and the forecasted increases in the future is indicative of a live music industry that navigates difficult and evolving circumstances and embraces innovation.

Photo courtesy of Riverfest Elora

Similarly, as climate emergencies increase in frequency and scale, live music workers are proactively developing mitigation plans to safeguard their operations while embracing more climate sensitive practices.

Similarly, as climate emergencies increase in frequency and scale, roundtable participants noted that live music workers are proactively developing mitigation plans to safeguard their operations while embracing more climate sensitive practices. For example, Under The Stars Music Festival in British Columbia's Okanagan Valley has been moved forward from the August window to a May and June window, when fire risk is lower.[55] Meanwhile, other festivals like Hillside Festival in Guelph and Mariposa Folk Festival are adding climate resilient measures like solar charging and water stations.[56, 57]

Some live music workers are responding to rising costs with measures to help make live music more accessible and/or their touring activities more cost-feasible, such as touring with smaller teams, touring to fewer smaller markets, and introducing sliding scale pricing models for tickets to shows. Others are adding even more to their plate to sustain themselves using their existing industry skills, taking on roles as music teachers, event planners, social media managers, and graphic designers, or starting new businesses that serve the industry.

Geographically, Canada's vastness presents logistical challenges for touring, yet it fosters vibrant local scenes and supportive networks that encourage collaboration and creativity. Industry roundtable discussions revealed that the sense of resiliency and adaptability is particularly evident in rural regions, where infrastructure and industry presence may be limited but a spirit of resourcefulness and collaboration thrives. The increasing adoption of DIY music spaces and house shows also reflects a grassroots, community-based approach to sustaining live music in an ever-evolving landscape.

55 KNKX. 2023. "Amid wildfires, music events reassess safety and sustainability."
56 Hillside Festival. "Hillside Festival – Green Initiatives."
57 Mariposa Folk Festival. "Greening Mariposa."

5.1.3 Community and Collaboration

Live music in Canada is marked by a strong sense of community, collaboration, and mutual support among artists, music professionals and music spaces, even across the country's vast geography. Industry roundtables revealed that music professionals in all corners of Canada share many of the same practical challenges and opportunities, such as Canadian geography, venue availability, and emerging discovery tools, which all contribute to a sense of common experience. Industry associations, local venues, and other convening spaces help to build a robust network of music professionals across the country.

Industry roundtable participants spoke at length about the collaborative spirit embodied by musicians and music workers, and how it further enhances this sense of community. Musicians and music workers contribute vital, though often undervalued, support to local life through performances, workshops, and community engagement, making live music an integral part of community identity and involvement. Meanwhile, festivals and live shows help to foster social cohesion by way of the celebration of local music and shared cultural identity.

At a broader community level, industry roundtable participants noted that live music can serve as a catalyst for community connections, fostering a sense of greater understanding among different culturally diverse groups through shared experiences at events. In local communities, festivals and performances are often tailored to certain communities or audiences, reflecting their unique interests and identities. Local pride is evident in the active support for homegrown events and artists, particularly in less populated areas of the country, creating a vibrant atmosphere that prioritizes community values. This local focus creates a symbiotic relationship between artists and audiences, where shared experiences and collective memories become the backbone of community identity.

Sonic Concerts by Sandra-Lee Layden

5.1.4 Professional Development and Supportive Ecosystem

As shared in roundtables and Hear and Now Survey findings, the live music industry in Canada benefits from a robust supportive ecosystem that seeks to develop new artists and music workers. Between government bodies, industry associations, major music corporations and individual music businesses and spaces, steps are being taken at various levels of the live music industry to ensure that talented musicians and music workers advance in their careers and fill emergent gaps in the labour pool.

The live music funding landscape is predominantly made up of federal funding bodies (e.g. FACTOR, Musicaction, Canadian Heritage, and the Canada Council for the Arts), provincial and territorial cultural and creative industry funders (e.g., Creative BC, Ontario Creates, SODEC), provincial and territorial arts councils and arts development agencies (e.g., Ontario Arts Council, Alberta Foundation for the Arts, Arts Nova Scotia), and private sector programs (e.g., the Canadian Starmaker Fund, RBC Emerging Artists Project). The breadth of funding support provided by these bodies is unique, especially when compared to the American market which provides less funding overall for a population of nearly ten times the size of Canada.[58]

58 The Philanthropist Journal. 2019. "A balancing act: Supporting the arts in Canada."

Live music in Canada is marked by a strong sense of community, collaboration, and mutual support among artists, music professionals and music spaces, even across the country's vast geography.

Alianait Arts Festival by Vincent Desrosiers

This level of funding gives Canadian artists a leg up in an increasingly globalized industry. Furthermore, the existence of Canadian content requirements and new enforced contributions to cultural funds supporting artists – in the wake of the Online Streaming Act (Bill C-11) – give Canadian artists a competitive advantage over their international counterparts in achieving a domestic following.[59]

There are a number of professional development opportunities cropping up in the live music industry. As one example, Canada's Music Incubator provides a number of programs and mentorship opportunities for music managers and artists alike.[60] Meanwhile, less formal professional development activities are taking place in live music spaces across the country as noted by industry roundtable participants. Established sound technicians in local venues are seeking to mentor emerging professionals and pass on their skills. Festivals and artist showcases not only provide opportunities for artists to reach new audiences, but also serve as critical networking opportunities for artists and industry professionals. Industry organizations and record labels run a wide array of artist development programs designed to nurture musicians and support their career development. Collectively, these elements create a supportive environment that encourages growth and continuity within Canada's live music community.

59 SOCAN. 2023. "Bill C-11 passed. Now what?"

60 For more information, please visit: https://canadasmusicincubator.com/about-us/

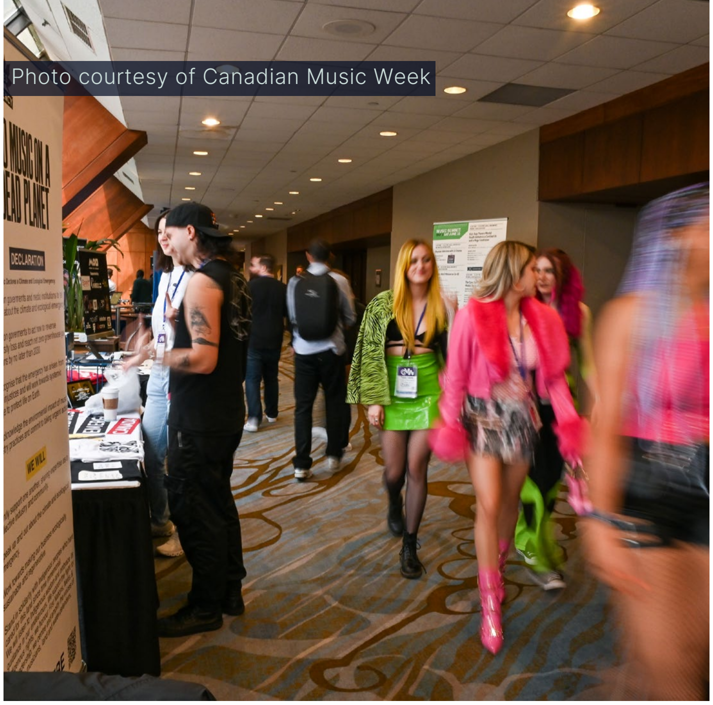


Photo courtesy of Canadian Music Week

5.1.5 International Recognition and Success

Canadian artists – from Neil Young and Shania Twain to Deborah Cox, Robbie Robertson, The Weeknd and beyond – have a long legacy of successfully reaching into international markets. Roundtable participants noted that they perceive Canadian artists and music workers to punch above their weight in international music markets, a perception that is validated by research from Music Canada showing that Canadian artists rank third in worldwide streams of the top 1000 singles, behind only the US and UK.

Canadian artists' export efforts benefit significantly from their proximity to the United States. Though proximity comes with an inherent risk of seeing the distinct qualities of Canadian music being absorbed into the more dominant American market, roundtable participants offered that that this geographic closeness is generally an advantage, particularly from a touring perspective. While cost can be prohibitive for some Canadian artists to cross the border and tour in the United States, many artists benefit from grant programs from Canadian funding bodies aimed at breaking into international markets and supporting these live touring activities, which serve as vital pathways for gaining recognition beyond Canada.

This international reach also extends beyond established mainstream commercial music acts. The annual Indigenous Music Summit in Canada, for example, serves as a one-of-a-kind convening event for the global Indigenous music community. The success of this summit is a clear indicator of the strength of the local Indigenous music industry to reach beyond Canadian borders and set a powerful example for Indigenous music communities around the world.

5.2 **Challenges & Trends**

While the live music industry has many strengths and provides significant contributions to Canada's social fabric and economy, it is also must contend with a number of shifts and trends. These shifts include increased financial pressures, changing audience behaviours, environmental sustainability concerns, and digital shifts and the rise of artificial intelligence.

5.2.1 Financial Pressures

The live music industry in Canada faces a variety of financial pressures that are reshaping its landscape and creating new challenges. These pressures can be grouped into three main areas: economic challenges, shifts in market dynamics, and labour and industry sustainability. Each of these areas presents specific obstacles that influence the ability of artists, venues, and organizers to adapt and succeed in this evolving environment. If addressed, it is imagined that the live music industry could provide even greater economic returns.

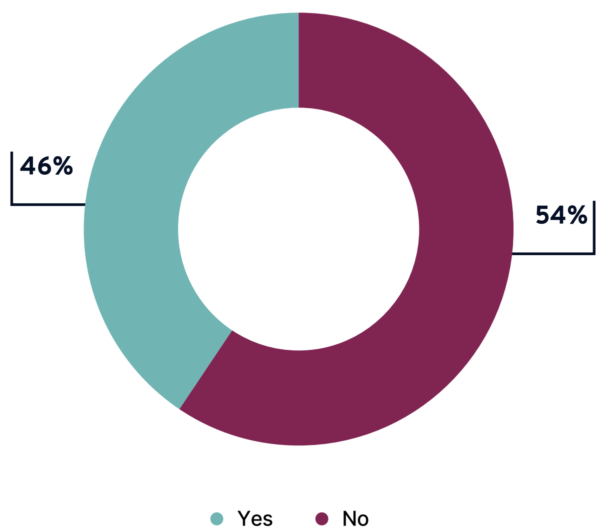
Economic Challenges

As noted by survey respondents and industry roundtable participants, the rising cost of living is making it increasingly difficult for artists and music professionals to maintain their careers, especially in major markets like Toronto, Vancouver, and Montreal. As a result, many artists are struggling to afford to live in the very cities that are central to Canada's music scene. However, this challenge has a silver lining. As many artists leave major urban centres, the industry is becoming more decentralized. This shift is helping smaller cities develop stronger, burgeoning live music scenes.

At the same time, the industry grapples with rising operational costs, with many festivals and events still recovering from the financial deficits caused by the pandemic. This recovery is made more difficult by the ongoing pressures of inflation and declining support from corporate sponsorships and government funding. These economic pressures create a challenging environment for maintaining sustainable operations in live music.

Public funding forms a critical support for the Canadian live music industry at present. According to national survey findings, the majority (54%) of companies, organizations, and artists relied on public grants to subsidize at least part of their revenue in 2023 (see Figure 20).

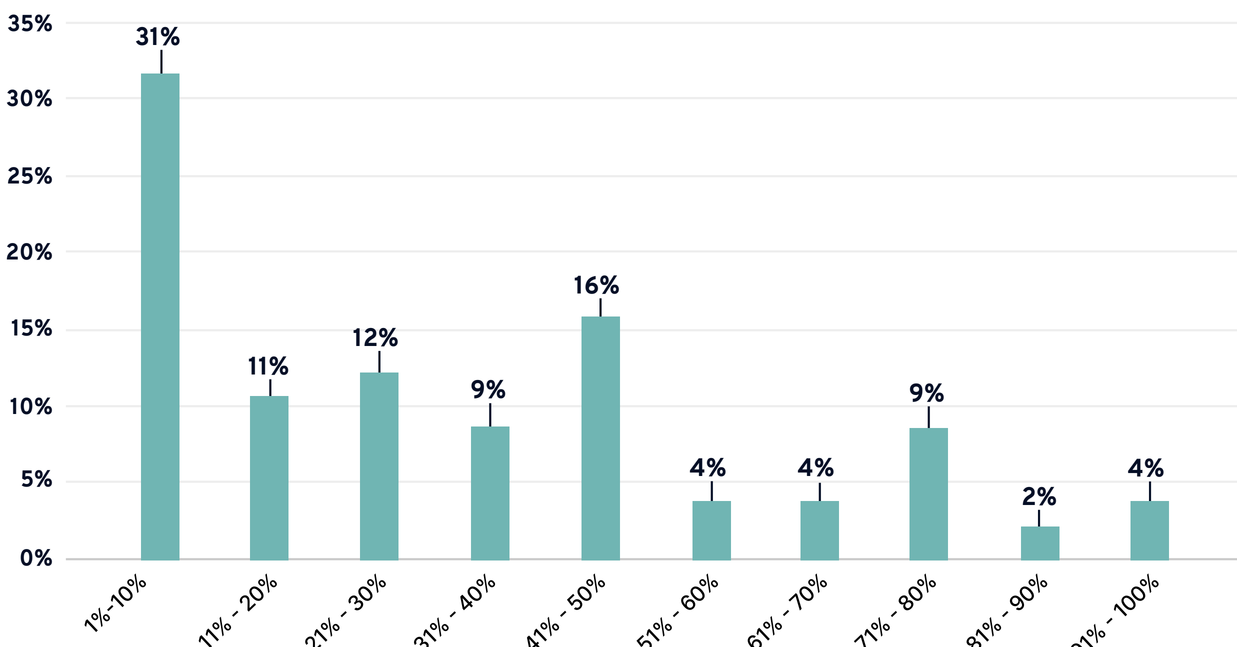
FIGURE 16:
Companies and Artist Entrepreneurs Receiving Grants in 2023



n=264
Source: Nordicity, Hear and Now Survey

Of those that do use grants, 79% use grant funding to cover up to half of their revenue (see Figure 17).

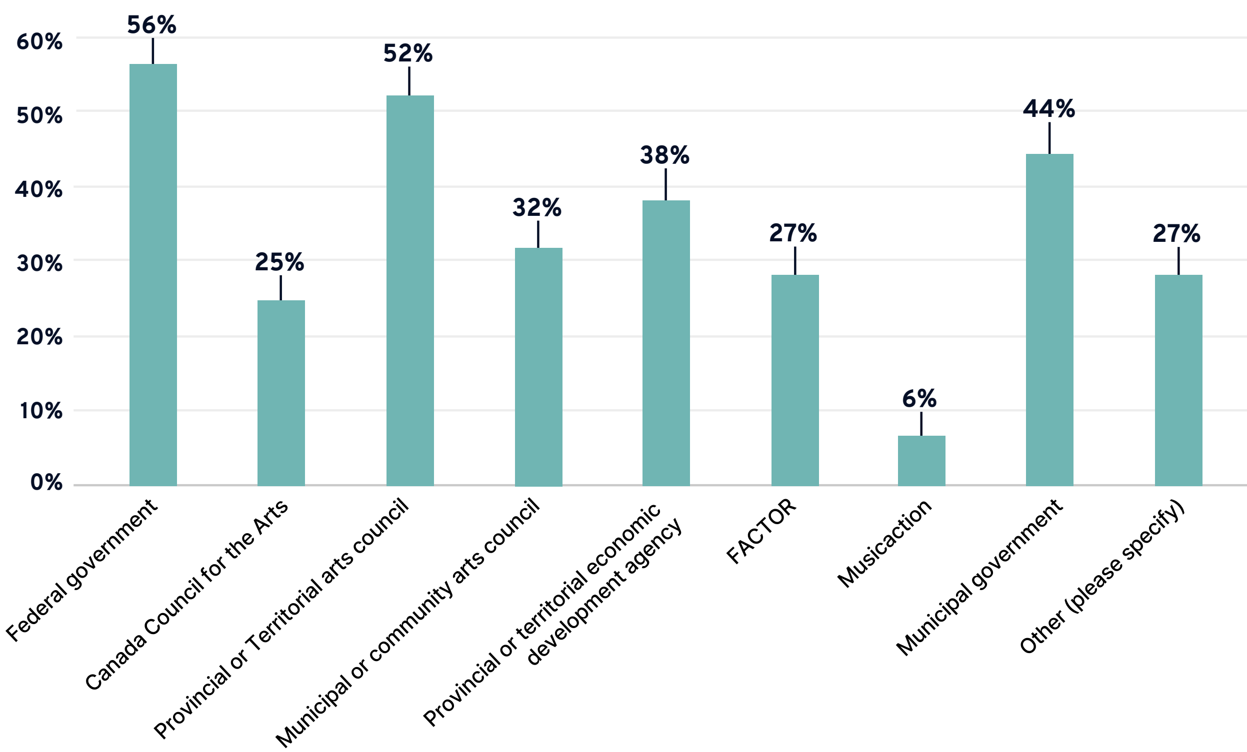
FIGURE 17:
Portion of 2023 Revenue from Grants



n=140
Source: Nordicity, Hear and Now Survey

The grant funding most typically accessed spans all levels of government, with respondents most frequently noting the federal government (56%), provincial or territorial arts council (52%), and municipal governments (44%) as the sources of their grant revenue in 2023 (see Figure 22). While also federal sources of funding, respondents less frequently selected FACTOR (27%) and Musicaction (6%), although both are dedicated music funds. The Canada Council for the Arts was also less frequently selected (25%) despite offering funding streams for music activity. Distinct from arts councils, provincial agencies were also not noted as a popular channel for live music funding (responses for this type of funding was encompassed in the 'Other' category).

FIGURE 18:
Sources of 2023 Grant Revenue



n=140
Source: Nordicity, Hear and Now Survey

While Canada is home to a strong public funding ecosystem that the live music industry regularly taps into, a lack of live-music funding support remains a key challenge noted by the industry. In the wake of new financial pressures, including increased operational expenses, public funding has generally stagnated. Across the industry, artists, companies, and organizations are having to compete for the same or smaller pools of grant funding, leading to increased competition and decreased revenue from public funds. With artists relying on live music as a core source of income, a lack of funding support to specifically meets the needs of the industry is a key challenge.

One on hand, some survey respondents and industry roundtable participants express that the live music industry in Canada tends to be overly reliant on public funds. To promote the longterm sustainability of artists, businesses, and organizations in Canada, it is believed by some that grant support should exist to help incubate and kick-start new initiatives rather than be viewed as a continued revenue stream. To mitigate this reliance on public funds, there is a need and opportunity for live music to more effectively tap into the private sector, such as by leveraging sponsorships and exploring strategic partnerships.

On the other hand, the industry notes an ongoing need to support venue development, artist development, festivals, market access, environmental initiatives, as well as equity initiatives.

Shifts in Market Dynamics

Shifts in market dynamics further compound the difficulties for live music. Industry roundtable participants noted that the necessity to increase ticket prices driven by rising costs, risks deterring audiences and limiting accessibility to live performances. Audience behavior has also shifted, with many becoming more selective about which events they attend. This change is influenced by a mix of financial pressures and lingering safety concerns, leading to lower turnout at concerts and festivals – especially small or medium scale ones.[61] Moreover, in challenging economic times, live music often falls under discretionary spending that households cut back on first. While demand is beginning to rebound, continued economic hardship is keeping levels from flourishing.

Additionally, industry roundtable participants note that there is an increasing number of festivals and live events, which has intensified competition, and made it especially hard for smaller venues and events to attract sufficient audiences to remain viable. This trend perhaps points to a need for greater collaboration and resource sharing among the festival and event ecosystem, and a need to support the sustainability of venues.

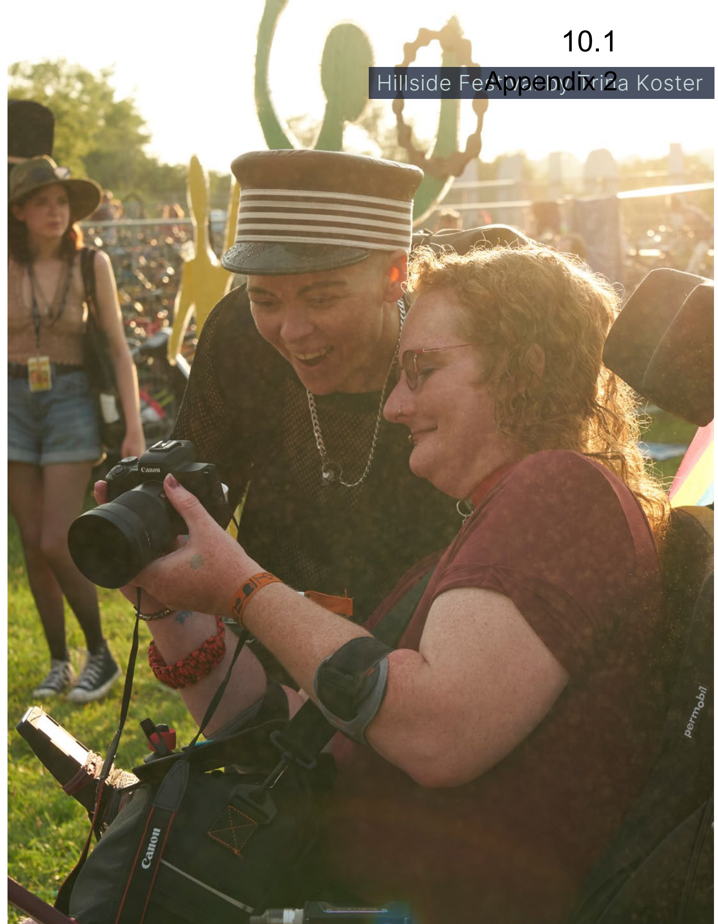
61 Global News. 2024. "What's behind the lack of enthusiasm for this year's music festivals?"

Sask Jazz Festival by Nathan Janzen

55% of survey respondents selected "funding support" as one of the industry's top challenges.

Labour and Industry Sustainability

Lastly, labour and industry sustainability remain critical challenges. Labour and programming costs represent the highest expenses for live music companies in Canada at 29% and 18% respectively (see Table 4) (and thus, represent a sizeable portion of the industry's overall economic impact), and the skilled labour force is paramount to its success. However, labour shortages are a persistent issue, as many workers who left the industry during the pandemic have not returned, leading to staffing challenges and operational constraints (see 5.3.3 for further discussion on capacity building). Survey respondents and industry roundtable participants noted that the high cost of living in key music markets not only affects established professionals but also limits opportunities for emerging artists to gain a foothold in the industry. With fewer affordable living options in key cultural hubs, the pipeline for new talent is squeezed, diminishing diversity and innovation in the music scene. At the same time, venues and promoters across the industry are more sensitive to risk in the current economic climate, reducing their willingness to take chances on emerging talent. This risk adversity further stifles growth and limits the introduction of fresh voices to the scene. These factors combined threaten the long-term sustainability and vibrancy of the live music industry in Canada.


Hillside Festival by Trina Koster

5.2.2 Shifting Audience Behaviour

Audience behaviors are shifting significantly, impacting the future of live music and events. One notable trend is the decline in alcohol consumption, particularly among younger generations like Gen Z, which has traditionally been a steady revenue stream for live venues.[62] Industry roundtable participants noted that the decline in alcohol sales is a worrisome trend for their ongoing sustainability.

While major acts demonstrate that there is still a market for live performances, audience spending is becoming more selective, with audiences focusing only on events they consider worth their investment. The high prices of tickets for these top-tier acts often strain fans' budgets, reducing their capacity to attend mid-range or smaller events, contributing to a more polarized spending pattern.[63] This trend has led to further market oversaturation, with many tours competing for audience attention, even as fans become more discerning in their choices.

Another key trend noted by industry roundtable participants is the decreased urgency or "fear of missing out," especially after the pandemic, resulting in fewer shows and shorter runs. Audiences now tend to "nibble" at cultural experiences, preferring one-day tickets over fullweek passes or festival subscriptions. Additionally, there is a growing trend of last-minute ticket purchases, making it difficult for event organizers and artists to predict attendance and manage financial planning effectively.[64] These changes pose challenges for the live event industry as it navigates a more cautious and selective audience base.

5.2.3 Environmental Sustainability

There is growing environmental concern across the industry as major climate events, such as forest fires in Western Canada, flooding rain, and other severe weather conditions, are becoming regular occurrences. For many live events – especially outdoor events – weather conditions are a key determinant of whether their event can move forward and thus have significant impacts on their

Labour and programming costs represent the highest expenses for live music companies in Canada and the skilled labour force is paramount to its success.

However, labour shortages are a persistent issue, as many workers who left the industry during the pandemic have not returned.

62 Forbes. 2023. "Why GenZ Is Drinking Less and What This Means for the Alcohol Industry."
63 Global News. 2024. "2024 was supposed to be a great summer for live music. It's not turning out that way."
64 Hive. 2024. "From last minute to first in line: navigating late ticket buyers."

outlook and operations.[65] As a result, festivals and events in particular are having to navigate a number of environmental complexities and enhance their contingency planning. However, while an important issue, industry roundtable participants noted that it is difficult to prioritize eco-responsibility and budgeting for contingencies with mounting financial pressures and dwindling resources. Accepting sponsorships can also present a conundrum for live events if those businesses do not align with their environmental sustainability goals.

Overall, there are broad calls across the industry from within the industry and from audiences for more funding and support to help advance environmental practices in all live events. Several Canadian music festivals are leading the way in this space, integrating various sustainability practices into their operations. A strong example is Hillside Festival in Guelph, Ontario, which won an International Clearwater Award in 2019 for their environmental efforts, including: creating a "living roof" atop their Main Stage; using reusable dishware and glassware; installing "trash turnaround" waste diversion stations; and offering subsidized shuttle busses and free water stations.[66] Moreover, a number of organizations in Canada are committed to shifting the needle when it comes to tackling environmental issues in music.[67]

One of the largest contributors to live music's environmental footprint is touring.[68] With artists travelling around Canada and outside the country, and audiences flying out to see their favourite acts, the industry continues to look at ways to decrease touring's impact on the environment. This increased awareness is leading to the rise of slow tourism, which is the practice of artists situating themselves in a specific area for an extended period rather than visiting for one or two shows.

It could mean an artist performs multiple shows in one location and explores other opportunities to engage with local audiences through workshops and popup appearances. There are multiple benefits to slow tourism beyond a sustainability standpoint. For one, it is beneficial for artists' well-being, allowing them to feel grounded in a place and reducing the pace of a tour. It also can be beneficial for audience development since it allows artists to engage more deeply by spending longer periods in a given location. Slow tourism also entails taking slower modes of transportation, such as public transit and trains over planes. However, in Canada, this aspect of slow tourism can prove difficult given the widespread geography of the country.

65 CBC. 2024. "Drought, wildfire concerns impact B.C. summer events."
66 Hillside Festival. "Hillside Festival – Green Initiatives."
67 An up-to-date list on the number of organizations actively pursuing sustainability practices in live music is available on the Sustainability Hub on the CLMA's website
68 Nature. 2024. "Live music is a major carbon sinner—but it could be a catalyst for change."

5.2.4 Digital and the Rise of Artificial Intelligence

Emerging digital technology and its role in live music events continues to be a major topic of discussion across the industry. Spurred on by the constraints of COVID-19, live events are continuing to experiment with the use of augmented reality (AR) and virtual reality (VR) to amplify in-person experiences, and to share the live experience with audiences at-home.[69] By providing VR experiences, live events can help connect audiences across Canada and beyond through a single experience, bridging the geographical divide. However, at present, the use of this technology is limited to larger event organizers who have the budget available for this level of experimentation.

The rise of artificial intelligence (AI) also continues to both excite and concern many industry players. AI is expected to greatly enhance live sound engineering and could be an incredible tool for audio engineers by providing quick troubleshooting assistance, and adjusting the balance and mix of a live event with increased ease. Additionally, AI may also help create and sync concert visuals and effects, such as lighting and projections, to create a more immersive experience for audiences.[70] While AI has great potential, there is concern that it may also have adverse effects, including putting certain roles and jobs in the industry at risk.

69 AR Insider. 2023. "How are Immersive Technologies Revolutionising the Music Industry?"
70 TSE Entertainment. 2024. "How AI Could Revolutionize Live Music Concerts."

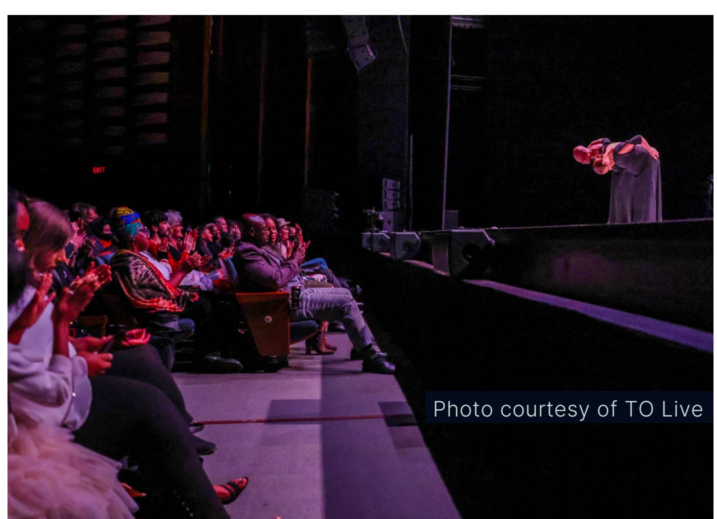


Photo courtesy of TO Live

Top challenges recorded by national survey respondents included: "availability of venues" at 47% and "availability of working and/or rehearsal spaces" at 38%.

Photo courtesy of Under the Spire Music Festival

5.3 **Needs**

To support a positive future outlook for Canada's live music industry and its potential for even greater economic returns, there are a few pressing needs. Research and engagement findings revealed key needs around protecting and strengthening venues and rehearsal spaces, enhancing representation and safety, supporting talent development and capacity building, and improving compensation and working conditions.

5.3.1 Venues & Rehearsal Spaces

Live music venues and rehearsal spaces are a key part of the live music ecosystem; venues in particular, by virtue of their high expenditures, contribute significantly to live music's overall economic impacts in Canada. The ongoing closure of live music venues is a critical challenge for Canada overcome to ensure a thriving live music ecosystem.

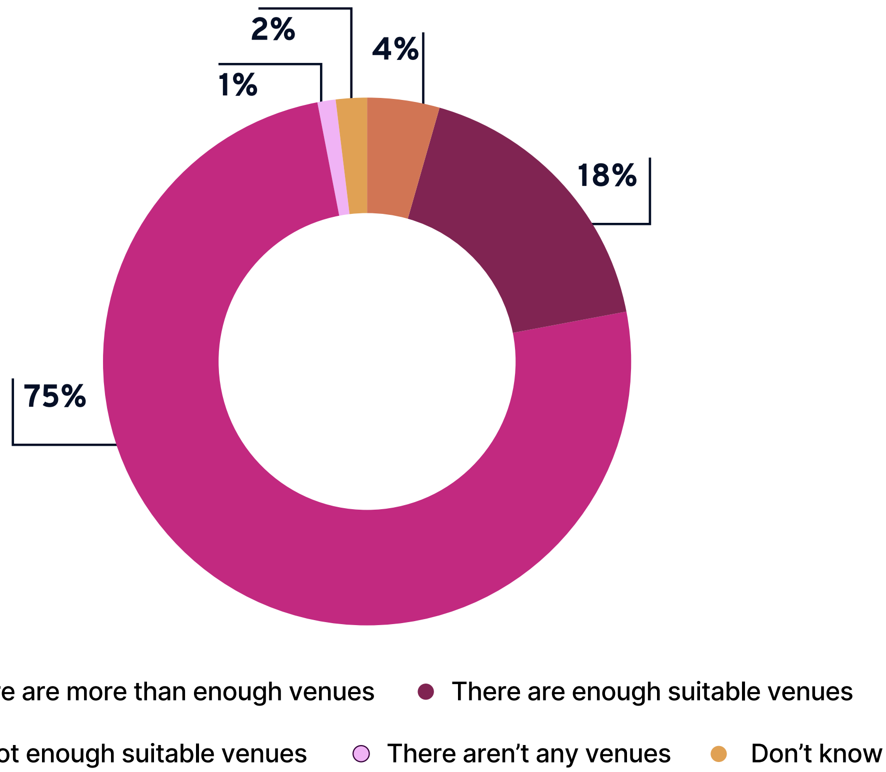
The disappearance of live music venues across Canada was exacerbated by the COVID-19 pandemic, but not solely attributable to those pandemic challenges. In Toronto, while approximately 15% of venues closed permanently in 2020-2021,[71] the city was already losing more than one venue per month between 2017 and 2019.[72] Similar challenges are being felt in music markets across the country, where rising operating costs and redevelopment pressures – compounded by the impact of the COVID-19 pandemic – have led to the current crisis point for live music venue and rehearsal space shortages.

As the high cost of housing continues to drive policy and market decisions, neighborhoods that were once creative and cultural hotbeds are seeing a steep increase in redevelopment activities, which is taking a toll on the dedicated venues, bars, restaurants, parks, and other live music spaces in those communities. In urban centres, gentrification pressures are slowly pricing venues out of their communities, often resulting in the demolition of many stalwart music spaces. Industry roundtable participants note that very few small and medium-sized live music venues own the buildings in which they operate, particularly in the largest music markets, making them susceptible to real estate activity. Moreover, there are fewer independent venues operating across Canada. [73] The critical shortage of small and mid-sized venues restricts access to local live music for artists and audiences, and creates a barrier to artist development as early-career artists are faced with fewer rightsized places to play.

71 City of Toronto. 2022. "Music Industry Strategy: 2022-2026."
72 Spacing. 2019. "Vanishing Venues: New Funding Models Favour Festivals Over Small Music Clubs."
73 CBC. 2023. "Where have all the small concert venues gone?"

In addition to a general shortage, 75% of survey respondents reported that there are not enough suitable venues in Canada (see Figure 23).

FIGURE 22:
Rating the Availability of Suitable Venues for Emerging Artists in Canada



n=426
Source: Nordicity, Hear and Now Survey

Industry roundtables also indicated that there is a lack of affordable and diverse performance spaces, and that most music venues are bars and restaurants while there are few music-first spaces. It was noted that bars and restaurants, given the presence of alcohol, are not necessarily inclusive for artists and audiences of all ages and cultures.

Across the country, there have been moves to explore more non-traditional music spaces. However, research supports that there is a strong need for continued, concerted efforts to nurture the development of new and burgeoning music spaces, and to protect existing musicfirst venues as the lifeline of the industry.

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> *"To shift who is on-stage, we have to shift what is happening off-stage"*
>
> \- Roundtable participant

5.3.2 Representation & Safety

The live music industry faces significant challenges related to representation, particularly regarding a lack of diversity in key gatekeeping roles such as agents, promoters, and venue operators. The absence of Indigenous, Black and racialized people in these positions affects mentorship opportunities, by making it difficult for aspiring diverse workers and artists interested in live music from seeing themselves reflected in the industry.

As one example, industry roundtable participants noted that there is a severe lack of Black artist agents in Canada, which in turn can make it difficult for Black artists to feel adequately understood, supported, and represented. This fact is supported by research from ADVANCE, Canada's Black Music Business Collective, who found that while nearly half of artists come from underserved communities, almost 80% of agents who represent them and manage their careers are white.[74] As another example, aspiring Black individuals looking to start their own booking agencies face significant obstacles due to limited networks and opportunities. Many existing agencies are often overwhelmed and unable to provide meaningful mentorship, leaving newcomers feeling isolated. Even when agencies are hiring, some in the industry note there is skepticism regarding their commitment to supporting diverse candidates effectively. This perpetuates a cycle of underrepresentation that limits opportunities for non-white artists and workers.

74 ADVANCE, Diversity Institute. Industry Analysis & The Value of Black Music.

Moreover, roundtable participants noted that the industry is not fully prepared to accommodate 2SLGBTQ+ and gender-diverse individuals. There is a pressing widespread need for infrastructure that supports gender diversity, such as gender-neutral bathrooms, safe green rooms, appropriate lighting, accessibility measures, and generally inclusive, welcoming spaces for artists, their touring teams, and audiences. The industry noted that venues need to continue taking visible steps to promote inclusive and safe spaces, including through clear signage and thoughtful accommodations.

Across the industry, there continues to be an urgent need to address the systemic barriers faced by IBPOC individuals, and members of the 2SLGBTQ+ community, through more targeted funding support, mentorship programs, and accelerators. Focusing on improving representation within the industry, and cultivating inclusive spaces where people feel safe and welcome, are critical steps towards a more equitable, diverse, and thriving live music ecosystem.

5.3.3 Talent Development & Capacity Building

The live music industry as a whole is currently facing a significant talent drain to larger markets, stunting the vitality and development of local scenes. Roundtable participants noted that many artists and live music workers are leaving their communities for access to more opportunities. This exodus is being experienced across the country, but especially in smaller regions and cities, with many artists and live music workers leaving for larger urban hubs within Canada or the United States. Additionally, industry stakeholders in smaller, more remote areas – like Northern Canada – note that it is difficult to attract, let alone retain, industry workers.

Alianait Arts Festival by Vincent Desrosiers


Broadway Theatre by Andrew Bromwell

To help counter this trend, it is crucial to create an environment that nurtures local talent, celebrates homegrown talent and regional success stories, and supports access to external markets and business opportunities while encouraging talent to keep Canada as a home base. Many organizations and businesses in the industry indicate their staff often juggle multiple roles and lack formal training. In particular, industry roundtable participants noted that there is a clear need for targeted training programs in areas like sound technology and event management to ensure that the workforce is equipped to meet the demands of the industry. Internships and co-ops also play a key role in enticing people into the industry.

Formal training does not exist for some roles in the industry, such as for artist managers or promoters. Many skills are honed and developed through years of experience, heightening the importance of mentorship opportunities in developing critical skillsets and strengthening professionalism in the industry. Many internships and co-ops are offered directly to aspiring industry-workers at an organizational level. As a major employer in the live music industry, Live Nation, as one example, offers various opportunities for internships throughout the entertainment industry, including in concert promotion, production, and marketing.

Relatedly, industry roundtable participants note that there is a need for greater awareness, access to, and availability of educational and mentorship opportunities for new artists and live music workers. Such opportunities help equip artists and live music workers with the necessary skills to navigate the complexities of the music industry. Industry roundtable participants noted that needed skills include knowledge around rights, royalties, taxes, and business skill development. The industry also noted the need for more industry mentorship opportunities in helping support a strengthened talent pipeline. By investing in mentorship and training, the industry can empower new voices and build more sustainable careers. Moreover, there is a lack of knowledge among those interested in the industry about what career paths exist.

There has also been a shift towards larger corporate entities running more shows and venues, which presents an opportunity for more sustainable cost-recovery models for venues and organizations. However, it also highlights the need for a balance that ensures local promoters, who are deeply connected to regional tastes and trends, continue to play an integral role. Supporting the development and growth of local promoters could help ensure early career opportunities for emerging artists, foster greater diversity in the industry, and ensure that local artists have the chance to thrive.

5.3.4 Compensation & Working Conditions

52% of respondents to the national survey selected “professional wages” as a top challenge. The lack of fair compensation continues to be a major challenge across live music. Many industry roundtable participants and survey respondents raised concern about low artist pay, with the prevalence of “pay-to-play” models leading to calls for fairer compensation practices. Some proposed potential solutions, such as the implementation of a living wage model for musicians and improving working conditions for gig workers. Ireland launched a pilot of its Basic Income for the Arts in 2022, which provided €325 per week to 2,000 eligible artists and creative arts workers.[75] This program has been granted €35 million as of Ireland’s 2025 budget to continue past the pilot phase.

These solutions were not just noted for musicians, but also to support more sustainable and favourable working conditions for all live music workers across the industry. Lack of compensation is having a direct impact on the talent drain in the industry and was also partly the reason many industry workers left to pursue new opportunities during the height of the pandemic. Additionally, many young people start out interested in the industry, especially drawn in through internships and co-ops, but leave for other industries due to lack of opportunities for salary growth.

75 HotPress. 2024. “Budget 2025: Basic Income for the Arts scheme extended with €35m.”

When it comes to working conditions, the industry cites mental health, stability, and burn-out as key challenges. The industry often requires those comfortable with flexibility and instability. For instance, those working in festivals often experience fluctuations in workload between periods of intense hours and activity – especially leading up to an event or production – among periods of downtime and inactivity. Contract work is common in the industry, which can present problems as these workers lack benefits. Additionally, it can be difficult to cobble together enough contracts to work in live music full-time. These challenges illuminate an overarching need for more supportive practices and healthier working conditions that will help attract and retain talent within the industry.

Fostering greater partnerships in terms of tourism circuits and across municipalities can help advance live music by increasing market access on a national scale.

5.3.5 Business Models & Market Access

Many in the industry feel that there is significant opportunity for increased connection and collaboration across the country to help tackle industry-wide challenges. For instance, fostering greater partnerships in terms of tourism circuits and across municipalities can help advance live music by increasing market access on a national scale.
Additionally, the industry is facing a pressing need for more innovative business models. Traditional revenue streams – particularly for music events, festivals, and venues, for whom expenses are especially high (see Table 5) – are under strain as audience behaviours evolve and economic realities shift. For instance, the rise in cost of living has decreased the amount of disposable income that audiences have available to spend on live shows. Moreover, live events can no longer rely heavily on alcohol sales given the trend of young people drinking less. Additionally, there is a growing need to confront the impact of climate change on event planning and operations through stronger contingency planning. These shifts necessitate a rethinking of business strategies and planning to ensure sustainability throughout the live music industry.

Wavelength Winter Festival by Green Yang

Some innovative business models and initiatives have emerged recently in the industry. For example, the Calgary Airport Authority alongside Calgary-based music organizations like Calgary Folk Fest, Calgary International Blues Festival and the Honens International, launched a showcase series at YYC in 2018 offering paid opportunities for local artist to perform to global audiences coming through the airport.[76] The program is now looking to expand into other nontraditional performance venues, such as hospitals.

Touring – a fundamental activity in live music and critical for audience development – is also presented with unique obstacles due to Canada's vast geography and high travel costs. Many artists, especially those based in more rural and remote areas, find it difficult to access new markets and perform regularly. The infrequency of suitable venues outside major hubs like southern Ontario and the lower mainland of British Columbia, means artists often incur significant costs traveling long distances between shows. Addressing these geographic and logistical barriers, such as through the introduction of regional touring circuits, is essential for facilitating greater market access and ensuring the viability of touring for Canadian musicians, and the live music workers that are supported through touring. Home Routes/Chemin Chez Nous is one such example of a regional touring circuit, spanning British Columbia and Alberta, to Manitoba and Ontario.[77]

76 YYC Calgary International Airport. 2018. "All about the Authority."
77 Home Routes/Chemin Chez Nous. 2024. "Home Routes Announces 2024/2025 Season."

5.3.6 Tourism & Promotion

Industry roundtable participants note that the integration of live music within tourism efforts remains rather limited across Canada. Live music is a significant tourism driver, and the tourism spending associated with live music contributes substantial economic impacts (including an estimated $4.67 billion in labour income, $8.92 billion in GDP, $3.21 billion in fiscal impacts, and over 77,000 full-time equivalent jobs in 2023, as outlined in section 4.2), yet there is greater opportunity to leverage this potential within destination marketing efforts. Many in the industry express that Canada excels at marketing its breathtaking landscapes and abundant recreational activities but is missing out on promoting its rich cultural experiences – including the vibrancy of its live music. There is a need and opportunity to enhance collaboration between the industry and Canadian tourism agencies to better highlight festivals and events to position Canada as a top destination for music lovers – not just outdoor enthusiasts.

Moreover, there is opportunity to better promote and champion regional and national success stories in live music to increase Canada's reputation on an international scale, and to encourage greater participation and support for local artists and events among domestic audiences. Joint collaborations between live music organizations and tourism bodies could not only help put Canada on the map in terms of its diverse live music industry and increase cultural tourism, but also help shape policies for the benefit of both industries.

Additionally, there is opportunity for municipalities and regions across Canada to recognize the importance of live music as a significant tourism driver. In particular, municipalities and regions could look to advance night-time economic strategies that will help support job creation in the industry and increase live music's economic potential.

Massey Hall by Nick Wons

Osheaga by Benoit Rousseau

Section VI:

CONCLUSION

Operating in an ever-evolving landscape, live music is becoming increasingly important and its potential for growth, along with the economic returns it generates, is clear.

To date, there has been a lack of awareness of the exceptional economic and cultural contributions of the live music industry – which was precisely the impetus for this report. **Hear and Now** establishes a crucial benchmark for measuring the industry's potential and progress over time. Equipping the industry with the clear data on the economic, tourism and social impacts of live music found in this report will help build a more fulsome understanding of the incredible value of live music and assist in advocacy efforts for greater support and recognition.

This report nods to several areas where future research would be beneficial to support the industry, including:

- Continued assessment of barriers for equity-deserving individuals, as well as equity, diversity and inclusion (e.g., in ownership and employment) across the industry.
- Additional research into environmental best practices across the industry.
- Regular measurement of the industry's impacts, to assess progress and potential over time.

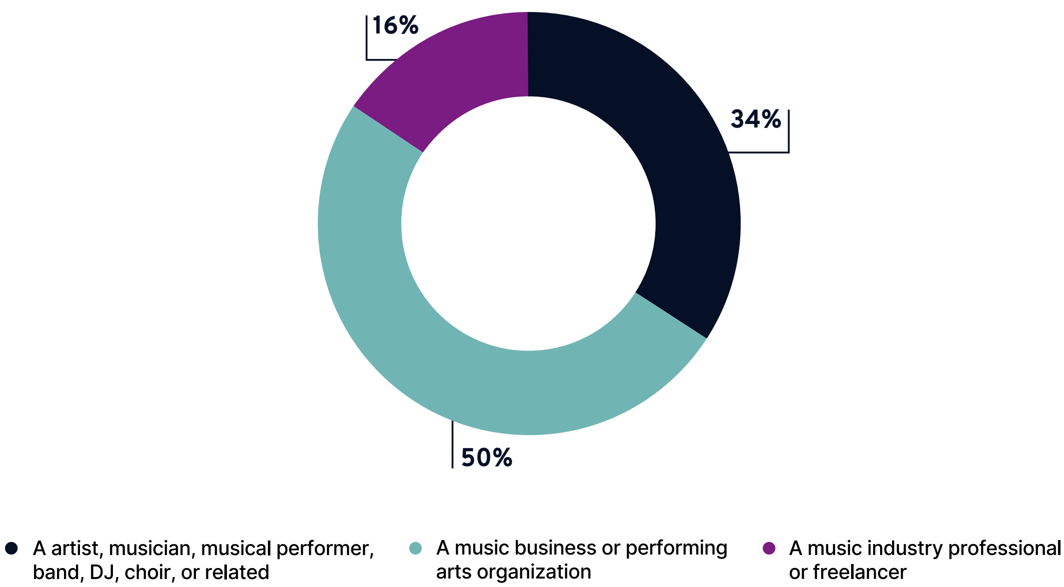
The live music industry in Canada is vast and varied – from artists, performers, and technicians to venue staff, promoters, and service workers – and attracts hundreds of thousands of tourists year over year. Additionally, the economic benefits of live music spillover to other industries, helping the creation and sustainability of jobs in sectors like hospitality, transportation, and retail. As live music flourishes, the industry generates more jobs and opportunities for artists to grow and expand their careers, and unlocks even greater economic potential for the benefit of all Canadians.

Photo courtesy of Canmore Folk Festival

Appendix A. Survey Respondent Breakdown

Half (50%) of the respondents were answering on behalf of a music business or performing arts organization; just over one-third (34%) were a self-managed artist, musician, performer, band, DJ, choir, or related; and 16% were freelancers in the music industry. The following chart shows the survey respondents broken out by respondent type.

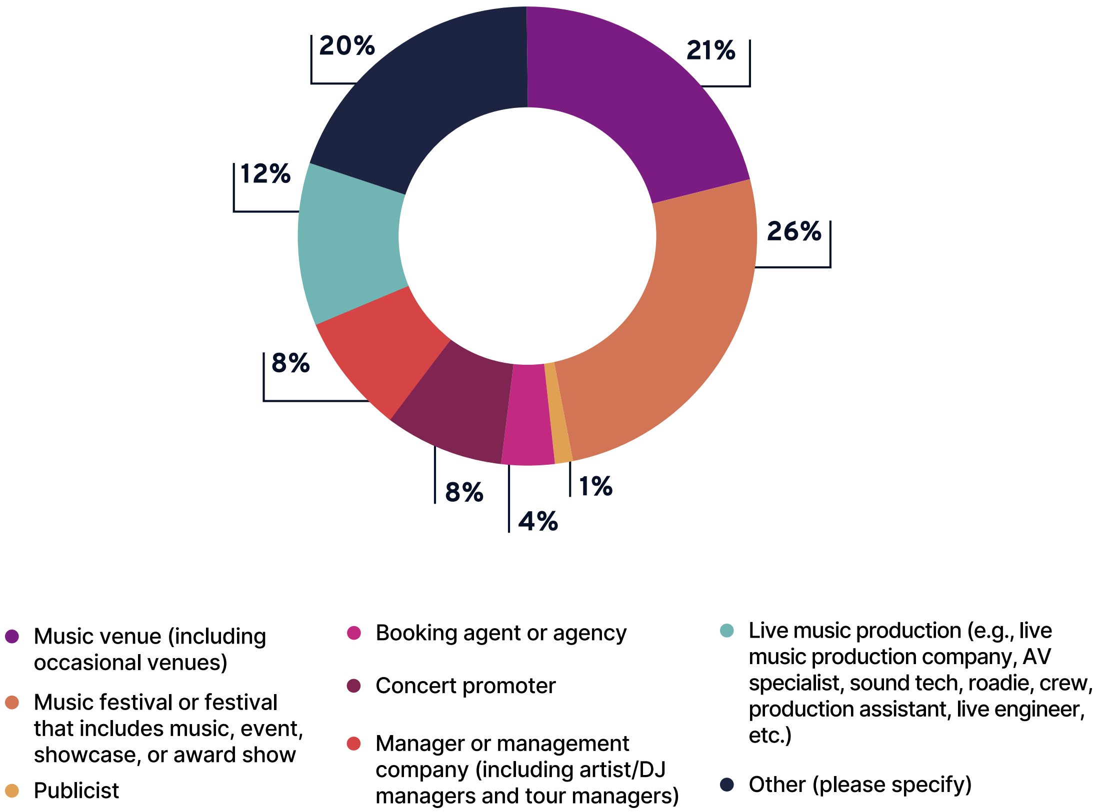
FIGURE 20:
Survey Respondent Type



n=652
Source: Nordicity, Hear and Now Survey

Over one-fifth (21%) of respondents were from a music venue, while slightly more than one-quarter (26%) were from a music festival, event, showcase, or award show. Respondents' primary function in the industry is illustrated in the chart below.

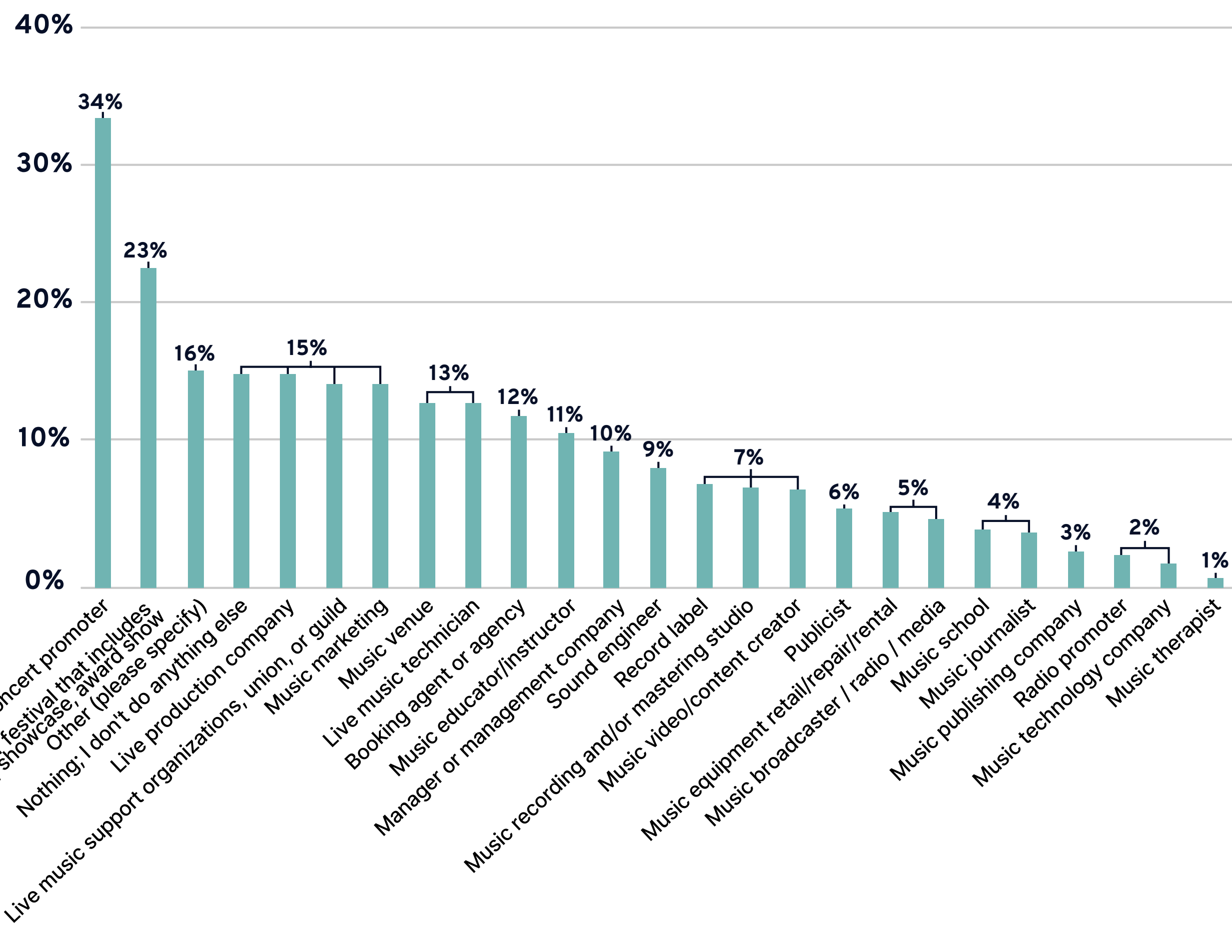
FIGURE 21:
Primary Role in Music Industry



n=430
Source: Nordicity, Hear and Now Survey

Respondents were also asked whether they had a secondary role in the live music industry, which 85% of company/organization respondents did – indicating that the vast majority of live music industry employees wear multiple professional hats (see chart below).

FIGURE 21:
Secondary Role in Music Industry



n=430
Source: Nordicity, Hear and Now Survey

Hear and Now

CANADIAN LIVE MUSIC ASSOCIATION 10 YEARS

Boots and Hearts Music Festival By Chris Ashlee