A COLLABORATION BETWEEN THE UNIVERSITY OF TORONTO SCHOOL OF CITIES AND WAVELENGTH MUSIC

REIMAGINING MUSIC VENUES

TOWARD NEW MODELS OF CONSERVATION AND INNOVATION FOR ONTARIO'S LIVE MUSIC SPACES

UNIVERSITY OF TORONTO | SCHOOL OF CITIES

WAVELENGTH MUSIC

TABLE OF CONTENTS

3 **FOREWORD**
4 **EXECUTIVE SUMMARY**
7 **BACKSTAGE: CONTEXT**
14 **SETTING THE STAGE:** The State of Ontario's Live Music Venues in the Years Preceding COVID-19
20 **DOORS CLOSED:** COVID-19 as a Critical Juncture for Live Music in Ontario
23 **SETTING THE SCENE:** Taking the Temperature of Ontario's Music Cities
26 **THE ONTARIO LIVE MUSIC ECOSYSTEM:** Perceptions, Barriers, and Alternatives
36 **NEW VENUE MODELS**: Case Studies
57 **POLICY RECOMMENDATIONS:** From Ideation to Implementation
66 **SETTING THE SCENE, CONTINUED:** Field Reports from Ontario's Music Cities
86 **APPENDIX I:** Yelp: Top 20 Toronto Music Venues by 12 Venue-Type Topics.
90 **APPENDIX II:** List Of Stakeholder Interviewees
90 **APPENDIX III:** Survey Questions

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FOREWORD

I spent a lot of my formative years in grimy, smoky dive bars. Watching other bands play, waiting for your turn to take the stage, then that exhilarating moment when the lights hit you and you're off — your 30-minute set time blurring by in what felt like 30 seconds of pure adrenaline, joy, and terror.

Small, grassroots music venues like Sneaky Dee's, El Mocambo, or the Drake Hotel were the cultural centres that incubated the local music community in my hometown, Toronto. To me, they seemed no different from a symphony hall or an art museum. It was only after I developed a career as a journalist and then a concert presenter that I understood these spaces were simply bars and clubs licensed to serve alcohol, with no explicit cultural mandate — and little to no public support.

This research project was a product of the pandemic, but that's not the whole story. The shutdown of all live music activity in 2020 added a palpable sense of doom to the already gloomy circumstances faced by live music venues. The 2010s saw venues close down at an alarming rate in Toronto, usually the victims of decreasing affordability.

The pandemic also coincided with the publication of my book, *Any Night of the Week*, a history of Toronto's local music scene that doubled as a treatise on the importance of live music venues to nurturing creativity and community. Since the late 1950s, Toronto has been exemplary for its vibrant club circuit, with hundreds of dedicated spaces booking live music. But the bulk of these venues were licensed bars or nightclubs that began booking bands or DJs as entertainment to sell more alcohol to stay afloat. The 2020 report *Re:Venues: A Case and Path Forward for Toronto's Live Music Industry* indicated an astonishing 53% of local venues' income came from drink sales, by far the largest source.

The system wasn't perfect, but it worked — for over 40 years. The "door/bar split," which became the norm in Toronto, allowed artists or promoters to make their money off ticket sales while their host venue profited from bar sales. DIY artists liked to grumble about this system — and often for good reason, as it privileged genres with heavy-drinking audiences, and marginalized or excluded those for whom alcohol was not part of their lifestyle.

Since the 2000s, I've taken part in many discussions with fellow music community members about the possibility of creating an alternative to live music's domination by alcohol, but it seemed forever beyond reach. Though there were all-ages spaces in the US like the Vera Project or 924 Gilman, in Ontario the system felt too entrenched.

At Wavelength — the organization I co-founded, and which co-convened this study — as presenters/promoters, we have had a special relationship with venues. We started out in those gritty, informal community centres: our original home in 2000, Ted's Wrecking Yard, was a 200-capacity club in Toronto's Little Italy. Only one of the bathrooms worked and the bar was a rough slab of granite, but it sounded fantastic and the sightlines were great. It was the perfect place to build a creative music scene — and our experience at Ted's reflected the key elements David Byrne defined in his dissection of New York City's iconic club CBGB in his book, *How Music Works*.

In the 2010s, Wavelength began to outgrow our traditional club homes, presenting more events in alternative spaces, like churches, libraries, arts centres, parks, and bike shops. But it was thanks to our increased access to grant funding that we could take the financial risks required to access these spaces. And "non-trad" venues continued to become more transient and labour-intensive.

When the pandemic hit, there was talk of a "Great Reset" or "building back better." Perhaps the pause afforded by lockdowns would allow us to revisit some of those longstanding conversations: Could there be a way to make venues more sustainable and equitable? Could they be integrated into public space in new, exciting, and imaginative ways? *Reimagining Music Venues* is the result of this optimistic, forward-looking thinking.

It's been an absolute pleasure to collaborate with brilliant thinkers like Dan Silver at the University of Toronto and the students from the School of Cities (thank you Shulie, Caleigh, Charu and Sophie). I'm gratified by the findings of this study, which not only provide data to confirm some long-held beliefs — that music venues provide value to communities, and that they are endangered — but also that there is the hunger within the community for transformative change, that live music spaces could be more accessible and innovative. I'm excited by the slate of new models and policy recommendations contained within this report. And I hope you're ready to dig in.

Jonathan Bunce (Jonny Dovercourt)
Wavelength Music

EXECUTIVE SUMMARY

ONTARIO'S LIVE MUSIC VENUES HAVE LONG SERVED AS DYNAMIC COMMUNITY CENTRES, ECONOMIC CATALYSTS, AND CULTURAL ENCLAVES. THESE INTEGRAL HUBS OF OUR MUSIC ECOSYSTEM CONTRIBUTE CONSIDERABLY TO THE PROVINCE'S RICH CULTURAL FABRIC. YET, THIS ECOSYSTEM IS AT A CRITICAL JUNCTURE. MUSICIANS, PRESENTERS, AND VENUE OWNERS/ OPERATORS FACE INCREASING DIFFICULTIES IN REALIZING THE TRUE VALUE THEY GENERATE, WHICH STIFLES THE GROWTH AND DIVERSIFICATION OF THIS SECTOR.

INDUSTRY CHALLENGES

Pre-COVID Struggles: Even before the pandemic, the industry witnessed more venue closures than openings, accompanied by escalating ticket prices and fewer shows. The reduced perceived monetary value from audiences, insufficient compensation for artists, and growing operational costs for owner/operators present a significant challenge for venues.

- **Impact of the Pandemic:** COVID-19 exacerbated these issues, pushing many smaller venues to the brink of closure, with Toronto witnessing a 13% closure rate.
- **Public Sentiment:** 75% of survey respondents consider local music venues as endangered or threatened.

OPPORTUNITIES FOR REIMAGINING IN THE WAKE OF COVID-19

The pandemic served as a catalyst for artists to dedicate more time to their craft and skill development. Moreover, it highlighted the frailties in the economic models underpinning many existing venues. In response, policy adaptations in the wake of COVID opened new streams of public funding and initiated a rethinking of live music's place in cultural policy frameworks. The relaxation of traditionally stringent regulations led to a blossoming of musical performances in outdoor spaces both public and private. This presents a unique opportunity to revise zoning, land use, and licensing to facilitate diverse musical entrepreneurs.

This study comprehensively analyzes Ontario's music ecosystem, focusing on the venues that anchor it. Weaving together data analysis, stakeholder surveys, interviews, a design-focused capstone project, and a literature review, we identify significant industry challenges, underscore the community value of music venues, and emphasize the importance of diversification and inclusivity.

KEY FINDINGS

- **Financial Constraints:** The core participants in the live music sector in Ontario — artists, presenters, and venue owners/operators — are struggling to grow and diversify the industry due to the steep costs of rent, property, insurance, and living expenses. Despite the value they generate, capturing adequate revenue remains a challenge.

- **Market Dysfunction:** A market incompatibility exists with audiences feeling overcharged, musicians feeling underpaid, and venue owners/operators burdened with high costs.

- **Declining Venues and Shows:** Even before the pandemic, the number of active venues and shows was declining. However, ticket prices have been on a steady rise since 2012.

- **Downtown Concentrations:** Most Ontario cities find their music venues concentrated in their downtown areas. Yet Ottawa is an outlier, with venues scattered throughout the city. This might explain why more stakeholders in Ottawa believe that their city's venues reflect the diversity of their communities than in other cities.

- **Community Value:** Community members appreciate the accessibility, community creation, preservation of local culture, and promotion of local art that can be provided by live music venues, and demand higher standards in basic amenities such as sound quality, water, and bathroom access. They wish for a venue experience that prioritizes quality musical performances at reasonable prices, with a keen interest in new spaces with a healthy and clean environment.

INNOVATIVE VENUE MODELS

The survey revealed a need for novel venue models that intertwine preservation and innovation. We identify and explore five potential models:

- **The Stage Truck**: a self-sufficient, mobile stage that can bring portable live music infrastructure to outdoor, public areas, particularly outside the downtown core where such permanent infrastructure is more of a financial risk

- **Everywhere's a Venue**: hosting live music events in spaces not conceived as venues (including parks, churches, parking lots, construction sites, and beaches), providing an alternative to the licensed bar environment

- **Multidisciplinary Arts Centres**: typically involving a music presenter or venue partnering with arts groups working in other disciplines, such as film, dance, theatre, comedy, and visual art

- **Music Centres**: similar to the multidisciplinary arts centre, but involving a clustering of music-specific uses, such as a venue (or multiple venues) at the heart of a building that could also incorporate rehearsal space, recording studios, workshop/educational space, cafe/socializing space, or office space for music businesses or companies

- **Cultural Land Trusts**: a model in which members of a community work together to raise funds or otherwise gain ownership of property by a non-profit trust, which then sells or leases buildings or space to community members at perpetually affordable rates

Dreamcrusher @ Wavelength Summer Thing, Lithuanian House, Toronto.
Photo: 1upcloud

POLICY RECOMMENDATIONS

Since 2014, at least 12 policy reports or studies have directly addressed live music in Ontario. We identify points of consensus along with gaps that have hindered the live music policy conversation in Ontario from moving beyond ideation and capacity-building toward generating evidence and action. Building on this existing work, our recommendations come in three steps:

- **Consolidation:** recurrent themes and recommendations that represent an emerging "music ecosystem consensus" including a suite of policy recommendations that range from the specific (such as appointing municipal music officers, designating parking and loading zones, or offering property tax subsidies) to the general (such as increasing grant funding, using underutilized spaces, and increasing data collection)

- **Evaluation:** offering three recommendations designed to establish regular data collection from Ontario's live music stakeholders:

    1. Creating a Live Music Ecosystem Observatory (LMEO) by partnering with industry stakeholders and universities

    2. Evaluating the effectiveness of common recommendations, such as: creating Music Offices; creating Agent of Change policies, changing zoning rules to create new infrastructure

    3. Conducting formal cost benefit analyses to guide public expenditures on cultural infrastructure

- **Implementation**: proposing four significant initiatives that could consolidate existing efforts into more effective platforms for supporting live music in Ontario and indeed in Canada as a whole:

    1. Building the Stage Truck — or a fleet of Stage Trucks — within municipalities

    2. Creating a new provincial charitable organization: the Ontario Space for Music Foundation

    3. Examining new funding models for live music, building on the success of pandemic recovery programs

    4. Advocating for a Cultural Renaissance 2.0, a successor to Ontario's set of ambitious cultural infrastructure projects undertaken in the early 2000s as part of the SuperBuild program, to be defined by repurposing and animating existing spaces, or integrating culture into new mixed-use projects

This research underscores the importance of fostering an adaptable and resilient live music ecosystem in Ontario. As we move forward, our focus should remain on mitigating existing challenges while innovating and evolving with new venue models. The proposed policy recommendations aim to provide practical paths toward this goal, offering a transformative blueprint to uplift and revitalize the Ontario live music scene. This endeavour although complex, holds the promise of a more vibrant and sustainable live music industry, resonating powerfully with the broader cultural and economic vibrancy of the province.

Absolutely Free @ Camp Wavelength 2015, Artscape Gibraltar Point, Toronto Island. Photo: Stephanie Keating

BACKSTAGE: CONTEXT

WHY DO MUSIC VENUES NEED TO BE REIMAGINED?

Music venues are more than just a room with a stage. They are community centres, cultural incubators, economic drivers, and vessels for our collective memory. They are central nodes in a complex musical ecosystem that generates tremendous value for Ontario's cities and communities.

However, this ecosystem is fragile. It faces a critical juncture in which it is increasingly difficult for its main producers — artists, presenters, and venue owner/operators — to realize enough of the value they generate to grow and diversify the sector, let alone to sustain it.

Even prior to the COVID-19 pandemic, more venues were closing than opening. Shows were contracting in number, and ticket prices were rising. Today, audiences increasingly feel they are getting less for their money; they have limited options to hear live music in a clean, affordable, and accessible environment. Musicians feel they are underpaid, while venue promoters and operators face steeply rising rental, property, and insurance costs. Many small venues operate on razor-thin margins. They often rely on alcohol sales as a primary source of revenue, which can be off-putting to some while generating safety concerns for many. Furthermore, recent studies show that younger people are consuming less alcohol than in the past[1], though alcohol consumption among older age groups is rising, especially after the transition into adulthood[2]. Taken together, these complex trends show a growing need to reconsider and potentially diversify how venues build their business models around drink sales.

Public health measures during COVID pushed many of the province's small venues over the edge. Our data indicates that in Toronto, 13% of music venues closed — strikingly, *all* (100%) of which were licensed clubs or grassroots venues under 300 capacity.

1 O'Connell-Domenich, Alejandra. "Why is Gen Z drinking less?" *The Hill*. April 6, 2023. Available online: https://thehill.com/changing-america/well-being/3936579-why-is-gen-z-drinking-less/

2 Keyes, Katherine M. "Age, Period, and Cohort Effects in Alcohol Use in the United States in the 20th and 21st Centuries." Alcohol Research Volume 42(1). January 13, 2022. Available online: https://www.ncbi.nlm.nih.gov/pmc/articles/PMC8772964/

Some 75% of respondents to our survey agreed that music venues in their community are endangered or threatened.

Operating in survival mode even prior to the existential risk posed by the pandemic, it has been difficult for the live music sector to grow and diversify in an inclusive way. Most small venues or club operators are passion-driven. They often profess a great desire to offer more musical styles and genres, and to provide more opportunities for all of Ontario's diverse population to perform in, program, and operate music venues. Yet with a shrinking pie, access to coveted performance stages is often given to privileged genres and communities.

The pandemic provided an opportunity to pause and reflect, and gain new skills.

50% of artists in our survey reported having more time to create during COVID; 45% reported having more time for developing new skills.

COVID highlighted the fragility of many existing venues, and the shaky economic model upon which they are founded. Skyrocketing downtown rents and insurance costs are drastically affecting music venues, which are mostly concentrated in city centres. This central clustering is crucial to their ability to function as dynamic scenes that constitute some of the most important cultural R&D labs for Canadian society, with benefits spilling over beyond their walls.

80% of respondents to our survey agreed that music venues bring vitality to their communities; 80% agree that music venues preserve local culture and memories.

Without new models for sustaining the economic viability of Ontario's musical ecosystem, this social value is at great risk.

Even as clustering generates social, cultural, and economic benefits, it concentrates live music venues in downtowns, leaving other parts of our cities and communities — especially those areas in which Ontario's immigrant communities tend to settle — with a relative dearth of live music offerings.

35% of respondents did not feel the venues in their neighbourhoods or cities reflected the diversity of those areas.

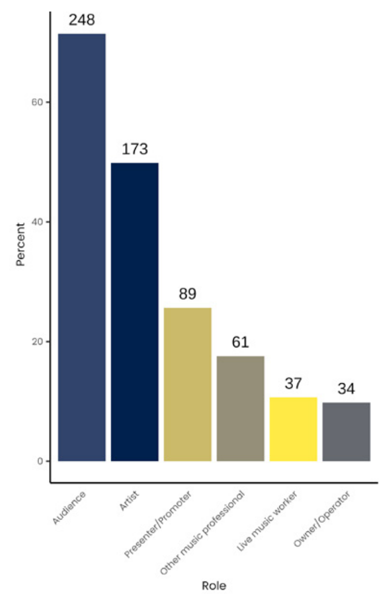
Without new models for bringing live music to more neighbourhoods and communities, live music will remain concentrated in urban downtowns and will tend to reflect the tastes and interests of those who live and frequent those areas.

The policy response to COVID opened up new sources of public funding for live music and created an opportunity to rethink the place of live music in cultural policy frameworks. While traditionally Canadian cultural policy has provided more direct support for musical recording and dissemination through agencies such as FACTOR, during COVID these funds became accessible to "for-profit" venues for the first time. The early days of reopening saw an increase in live music attendance, often sparked by lower ticket prices. As musical recording, production, and dissemination costs decline, the cost of live music presentation correspondingly grows. This is a historic chance to reorient cultural policy models to accommodate these changes.

COVID also saw a blossoming of musical performance in outdoor public and private spaces. Ontario's traditionally onerous regulations on outdoor cultural performances — even on high streets bustling with nighttime activities — were relaxed. Residents hosted performances on their porches, and communities self-organized to support shows in parks. This too is a historic chance to learn from these experiences, formalize some of the changes as policy, and consider how to revise zoning, land use, and licensing so as to make it easier for diverse musical entrepreneurs to explore new venue spaces, features, and models, while respectfully co-existing with local residential communities.

Survey Respondents by Role

Figure 1



☛ *Note: This figure shows the composition of our survey respondents by role. Percentages add up to more than 100 because respondents could choose multiple roles.*

AN ECOSYSTEM APPROACH

The term "Music City" has fallen out of favour in music policy circles in recent years. Within grassroots music communities, it became an invitation to cynicism, especially when a much-beloved venue suddenly closed down. For many commentators, the term was too reductive: cities may be the hubs that support music scenes, but musical creativity can happen anywhere. Some great music is produced in remote isolation — a fact more relevant than ever since the pandemic — and far-flung creators distant from city centres deserve to not be excluded from policy discussions.

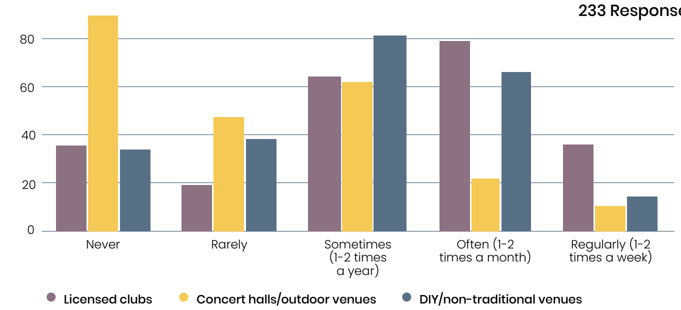
This is an especially relevant point for our study, which aims to speak to the situation in Ontario, Canada's most populous and second-largest province, with a vast area larger than most countries.

To reflect this more holistic thinking, we take as our topic the "Music Ecosystem." Venues are just one piece of this ecosystem, but to take the ecological metaphor further, they are the habitats in which organisms feed, reproduce, and thrive.

Buildings alone can't tell the whole story. It is the people who inhabit and animate them that we need to hear from. We consulted community members who played a wide range of roles: artists/musicians, concert presenters/promoters, venue owners/operators, technical staff, music industry workers, and audience members. It was important to consider the range of experiences and ways that different actors interact with live music spaces.

Where survey respondents perform and work *Figure 2*

233 Responses



☛ *Note: This figure shows where survey respondents typically work or perform. The high purple bars over "often" and "regularly" indicate that licensed clubs are the most frequent performance/work venue for respondents.*

Audience members made up the largest group in our survey, at 71%. (More information about the survey below, on page 90) We also heard from owners/operators, of whom there are naturally fewer (10%). Half (50%) of survey respondents considered themselves artists or musicians. Another 26% are event promoters or presenters, while 29% either work in the live music or broader music sector in some other capacity (percentages add up to more than 100 because respondents can select multiple roles).

Reported experiences also reflected the DIY/grassroots nature of this sample of the ecosystem — of the survey respondents who identified as artists or workers, **55% have rarely or never worked or performed in concert halls or large outdoor venues**.

Meanwhile, **49% regularly or often work or perform in licensed clubs**, the most frequently encountered venue type. As for the third category of venue, **51% rarely or only sometimes work or perform in DIY/non-traditional venues**, indicating such spaces' relative scarcity. Figure 2 shows how survey participants engaged with these three types of venues.

Hania Rani @ Wavelength, St. Anne's Parish Hall, Toronto. Photo: Green Yang

THE THREE TYPES OF MUSIC VENUE

We defined three general venue types for the purposes of this study. These categories are not rigid, and some spaces might fit under more than one definition. The three types of venues are:

Licensed Clubs

The most common venue type in Ontario, these are licensed bars or nightclubs that book live entertainment with the express purpose of selling alcohol, with capacities of under 1,000 persons. Examples include the Horseshoe Tavern, the Garrison, Bambi's, Lula Lounge or the Monarch Tavern in Toronto; LIVE! on Elgin or House of TARG in Ottawa; the Casbah or Mills Hardware in Hamilton; the Townehouse Tavern in Sudbury; and Phog Lounge in Windsor. The traditional first rung(s) on the "venue ladder," small licensed clubs are the places emerging artists are most likely to play. Also known as "grassroots venues" in some jurisdictions, they are usually independent, for-profit businesses run by passion-driven operators.

Historically, the licensed club model for live music began to emerge in the 1950s after Ontario legalized cocktail bars, and was formalized in the '80s with the establishment of the "door/bar split," in which the promoter or self-presenting artist keeps all the proceeds from ticket or "door" sales, while the venues keeps all bar sales, with no money changing hands. This economic model is thus deeply dependent on revenue from alcohol sales. The 2020 report *Re:Venues: A Case and Path Forward for Toronto's Live Music Industry* indicated an astonishing 53% of Toronto venues' income came from drink sales, by far the largest source and more than 3.5 times that of the second-ranking source, food sales[3]. (This study included all venue types.)

3 Nordicity and the Canadian Live Music Association. *Re:Venues: A Case and Path Forward for Toronto's Live Music Industry.* 2020. Pg. 33. Available online: https://www.toronto.ca/wp-content/uploads/2020/10/9846-Re-Venues-FINAL-REPORT.pdf

Genre-wise, we similarly aimed to represent the "biodiversity" of the music ecosystem by engaging as many different musical genres as possible. We shared our survey with diverse cultural organizations and targeted genre-specific Facebook groups in order to reach as many different creative communities as possible, such as hip-hop, classical, reggae or metal. The DIY music community's association with indie/alternative music did mean that the **majority of respondents (56%)** identified with those genres. But others were well-represented, including jazz, folk, rock, experimental, punk, pop and electronica. And our definition of "live music" was not limited to just live bands; we worked to ensure that DJ-driven events were not excluded from the study.

We wanted to assess the health of Ontario's music ecosystem, and find out:

- What do people value about venues?
- What are their challenges or barriers accessing venues?
- What do we want to change, and what do we want to keep?
- Can we dream big? But also propose practical, grounded solutions?

METHODOLOGY

This study consists of four components:

1. **Data Analysis**
   As data on Ontario's live music sector is difficult to obtain, creative data-gathering methods have been employed to better understand the quantity of live music activity in the province, how it has changed over time, and its geographical distribution, as well as gain unfiltered insights into audience perceptions of music venues. Our analysis combines three novel "big data" sources, and one more traditional:

   a. ***Exclaim!*** is a long-running Canadian national music and entertainment magazine, which publishes a free print edition six times a year as well as daily content online at exclaim.ca. Founded in 1992 in Toronto, *Exclaim!* is an anomalous success story in Canadian arts media, having escaped the decimation of its sector and retaining both advertising revenue and staff. The publication also offers Canadian concert listings, featuring events from across the country that can be filtered by city. Due to its national nature, exclaim.ca's listings offer the broadest cross-section of concert activity in Ontario. *Exclaim!* was able to share their complete Ontario concert listings from 2017–19, providing a snapshot of live music in the province in the three years leading up to the pandemic.

   b. **Just Shows**, an online concert listings website. With a minimalist mandate of "live music listings, only better," Just Shows was founded in 2011 as a passion

Concert Halls or Outdoor Venues

Generally speaking, this category includes all dedicated concert stages over 1,000 capacity. This includes traditional concert halls or performing arts centres such as Massey Hall, Roy Thomson Hall or Koerner Hall in Toronto, the National Arts Centre in Ottawa, or the River Run Centre in Guelph; high-capacity clubs such as the Danforth Music Hall, Phoenix Concert Theatre or History in Toronto, or the London Music Hall in London, ON; sports arenas such as Scotiabank Arena in Toronto or FirstOntario Centre in Hamilton; and outdoor stadia such as the Budweiser Stage in Toronto or Bell Park in Sudbury. For casual or first-time concert-goers, this is the venue type they are most likely to encounter, but the vast majority of artists are unlikely to ever reach stages this size.

Lonely Parade @ Wavelength, Bike Pirates, Toronto. Photo: Cassandra Popescu

DIY/Non-Traditional Venues

The most wide-ranging of venue type, DIY/non-traditional spaces can include churches, galleries, community centres, parks, backyards, laneways or laundromats — anywhere sound or staging infrastructure is not permanently installed, or where one might not expect to hear live music. It should also be noted that churches are becoming more common for public-facing music programming, and could be viewed as a category in their own right.

"Non-trad" spaces are usually rented out by grassroots presenters or enterprising artists for one-off shows. As such, they are by nature transient. But there are also more established, non-commercial spaces with institutional histories, such as Arraymusic, the Music Gallery or the Tranzac in Toronto, Club SAW in Ottawa, and Silence in Guelph. DIY venues can be dedicated, ongoing performance spaces run by artists or community members, sometimes doubling as residential living spaces. In the early 2010s, Toronto saw a renaissance of such spaces, many of which operated in unsanctioned capacities. These DIY spaces were driven to extinction by the end of the decade, either by gentrification-related evictions or crackdowns by local authorities. More recently, platforms like Side Door and Sofar Sounds have used online platforms to make DIY concerts accessible to both artists and audiences.

project by a small collective of Toronto-based artists and promoters. Though justshows.com's city-based offerings in Ontario only cover Toronto and Ottawa (in addition to other major cities across Canada) with a focus on punk and indie/alternative genres, the organizers shared listings covering the years 2011–22, allowing us to compare a wide temporal spread of data. Just Shows' data also provides insights into trends in ticket prices, as well as the percentage of shows that sell out or are free.

c. ***Yelp.com*** is a popular online review site that includes listings for music venues. Our study draws on Yelp data accessed in 2019[4]. We use this information to examine user reviews of music venues in Toronto. This helps to build a novel typology of music venues based on how reviewers discuss them. We have then drawn connections between reviewers' pre-COVID perceptions of venues and said venues' likelihood of having survived the pandemic.

Concert listings data is by no means perfect. Listings information can never be exhaustively complete, as smaller events must be submitted by the individual organizers or performers, while larger promoters and venues are able to share their event announcements with listings portals automatically. There will also be a bias toward the genres and communities that a publication or portal are more likely to serve or be followed by. Community events and house shows are likely to not be included. Due to the challenges of monetizing these platforms, listings portals can fall into disuse, both by the communities they serve and their own moderators.

We therefore view the listings data studied in this report as a complement to the venue directories offered by municipal Music Offices, live music industry reports conducted by firms such as Nordicity, and economic impact analyses offered elsewhere, often collected by surveys or business directories. The Exclaim! and Just Shows data provide insight into trends over time and across cities that these traditional sources often lack, while Yelp taps into audience sentiments generated in the course of their real-world engagement with venues, rather than in the somewhat artificial setting of interviews and surveys.

2. **Stakeholder Survey: Music Ecosystem Focused**
A province-wide stakeholder survey was conducted in the spring and summer of 2022, promoted by Wavelength via its website, newsletter and social media, and shared by other organizations that were conducted through community outreach efforts. Arts and cultural groups that were asked to share the survey included municipal arts councils, music industry associations, advocacy groups (e.g., ADVANCE: Canada's Black Music Business Collective, Indigenous Performing Arts Alliance), and presenters and venues across Ontario.

The survey saw a very robust response (n=347), with very generous and engaged commentary by respondents. Survey respondent demographics were largely similar to that of the province as a whole and the broader artist population. Specifically, our respondent population is nearly the same as the province's in terms of age and race, yet like the artist population more broadly, is more likely to reside in Toronto, hold a university degree, and identify with non-traditional gender roles. Our respondents likely represent a distinct sub-population who are more engaged in the music community and are more likely to have some connection to Wavelength. Therefore, results may not generalize to the population as a whole. Even so, the survey gives valuable insight into how this dedicated and committed group of individuals feel about the state and direction of live music in Ontario.

COMPARING SURVEY AND PROVINCIAL DEMOGRAPHICS

Variable	Survey	Province
Average age	41	41
% with BA or higher	61	31
% visible minority	27	29
*gender (% man)	46	49
% reside in Toronto	64	42

*2021 census data indicates 0.2% of Ontario's population identifies as non-binary or transgender. About 10% of our survey respondents identified as such.

☛ *Note: This table compares demographics of survey respondents to provincial demographics.*

4 Olson, Alexander W., Fernando Calderon-Figueroa, Olimpia Bidian, Daniel Silver, and Scott Sanner. "Reading the city through its neighbourhoods: Deep text embeddings of Yelp reviews as a basis for determining similarity and change." Cities 110 (2021): 103045

With an ecosystem approach as described above, the various roles that respondents could select allowed for a holistic view of the province's entire live music sector, from beginning to end of its supply chain (producers to consumers). Survey respondents had the choice of the following categories:

- Artist/musician who performs in venues (or wishes to perform in venues)
- Event organizer/presenter/promoter who makes use of venues
- Venue owner or operator
- Worker in the live music sector (tech, hospitality, etc.)
- Other music sector professional who attends or networks at events in venues
- Audience member who attends events in venues
- None of the above

Respondents had the choice to self-identify and were given the option to choose more than one category, in recognition of the factor that many participants in the music ecosystem play more than one role, or "wear many hats."

Survey respondents were asked questions about their frequency working in or attending venues, the types of venues they interacted with, what they valued out of venues, their perception of the threats facing venues, the barriers or challenges they have experienced in venues, access to funding, COVID impacts, genre affiliations, and features or types of new or emerging venue models. (See Appendix III for the full list of survey questions and responses.)

3. **Stakeholder Interviews: Music City Focused**
   Though the term "Music City" may no longer be in vogue, it is still the case that local music scenes strongly identify with cities and civic identity. To delve deeper into what is happening on the ground in the province's many music cities, study co-leader Jonathan Bunce conducted interviews with more than 20 stakeholders, and travelled to three different Ontario cities outside of Toronto to embed himself in the local music scene, attend concerts, visit venues, conduct in-person interviews, and take the temperature of the local music scene. Interviews were also conducted via Zoom video conferencing, telephone, or email.

   In terms of roles, interviewees spanned a similar range as the survey, including artists, presenters, venue operators, and representatives of municipalities or music industry associations. National and international case studies also included interviews with organizers and operators in Montreal, QC; New York, NY (USA); and London (UK).

   Interviewees were asked questions related to programming strategy, venue access, space usage, genre affiliations, marketing strategy, COVID impacts, the mood of their local music community, business and revenue strategy, and describing their dream venue, among other topics.

4. **MUCP Capstone Project: Design-Focused**
   A student team of multidisciplinary fourth-year undergraduate students from the University of Toronto School of Cities selected a project of interest to them as a group, under the broad umbrella of the Reimagining Music Venues topic, and undertook a design-focused feasibility study during the 2021–22 academic year. The resulting conceptual design for a mobile stage — which is all-inclusive in terms of both accessibility and amenities, as well as fully detailed and costed out — is a truly imaginative and potentially transformative new production enhancement tool just waiting to be adopted by a user group.

These were all informed by an extensive literature review that included academic studies on the music sector, industry reports and research, journalism and news articles, and organizational websites. Supplementary research by a team of University of Toronto students led by Ari Mazzeo included a focus group with Toronto DIY presenters and small music space organizers, which provided additional background context in formulating questions and identifying issues to pursue via the core research methods upon which the report is based, listed above.

WHAT YOU'LL FIND IN THIS REPORT

The report proceeds in six main sections.

1. **Setting the Stage: The State of Ontario's Live Music Venues in the Years Preceding COVID**

   This section joins concert listing data and Yelp review data to get a read on the state of the live music sector in Ontario in the years preceding the pandemic. Overall, we observe **declining numbers of venues and shows** across the province. Focusing on Toronto, we find that the city's **larger commercial and established publicly supported venues survived the pandemic**, regardless of their perceived quality evidenced in Yelp reviews. By contrast, and also independent of their perceived quality, **smaller venues that depended on drink and food sales were much more at risk of closing**.

2. **Doors Closed: COVID-19 As a Critical Juncture for Live Music in Ontario**

   This section reports on our stakeholder survey, highlighting questions about the experiences of respondents during the pandemic. We find that there was considerable uptake of public funding and COVID relief funds, with promoters and owner/operators in particular gaining access to new funding sources. Artists also were broadly grateful for pandemic subsidies, and took the opportunity to gain new skills, pursue new collaborations, and perform in new digital and outdoor settings. There was a widespread desire to reimagine music venues and the ways in which to support them.

3. **Setting the Scene: Taking the Temperature of Ontario's Music Cities**

   This section gives "scene reports" from six of Ontario's vibrant music cities, drawing on survey data, stakeholder interviews, and literature reviews to illuminate the varying challenges and opportunities around live music presentation across the province. We aimed to represent a range of regions, from north to central to east to west. While we could not include all communities — such as Thunder Bay, Windsor, Kitchener-Waterloo, St. Catharines, Barrie, Brampton, Oshawa, Peterborough, Kingston, and so many others — we hope that the insights gained from the scene reports may apply elsewhere.

4. **The Ontario Live Music Ecosystem: Perceptions, Barriers, and Alternatives**

   This section overviews key results from our stakeholder survey regarding respondents' perceptions about the current state of live music venues, barriers, and challenges to accessing music venues and realizing their potential, along with opinions about possible new venue models. We find that while stakeholders perceive live music to be extremely valuable, there is widespread worry about their future. **The live music market appears to be in a state of dysfunction.** While there is little interest in technological solutions, there is considerable appetite for innovative combinations of venue features, new ways of delivering live music to diverse communities and neighbourhoods, and exploring non-traditional spaces for presenting live music.

5. **New Venue Models: Case Studies**

   This section offers an overview of five new or emerging models for small or grassroots music venue operation. If they are not globally innovative, they are at least currently uncommon in Ontario. This study is aspirational, but also grounded in real-world examples from other jurisdictions. The five new models we'll explore are: **The Stage Truck**; **The Venue in the Arts Centre: Multidisciplinary Space Partnerships**; **The Music Centre; Everywhere's a Venue**; and **Community Ownership? Community or Cultural Land Trusts**. Ontario readers may find the act of merely considering these various examples of imaginative placemaking from other jurisdictions either inspiring or sobering, as it highlights what's missing in our own backyard. But we were also happy to include some homegrown causes for optimism, with profiles of a handful forward-thinking, community-oriented spaces currently thriving in Ontario.

6. **Policy Recommendations: From Ideation to Implementation**

   This section considers our findings in the context of a large number of studies and policy reports that have addressed live music in Ontario within the last decade. Reviewing and synthesizing key recurrent recommendations, we identify key gaps in evaluation and implementation. We then propose a series of recommendations of our own: the first addressing the evaluation gap through the establishment of a **Live Music Ecosystem Observatory (LMEO)**; the second set relating to implementation, through: i. Building the **Stage Truck**; ii. Establishing an **Ontario Space for Music Foundation**; iii. **Examining new funding models for live music, building on the success of pandemic recovery programs,** and iv. Advocating for a **Cultural Renaissance 2.0**.

Hugh's Room, Toronto (past location). Photo: GTD Aquitane

SETTING THE STAGE:

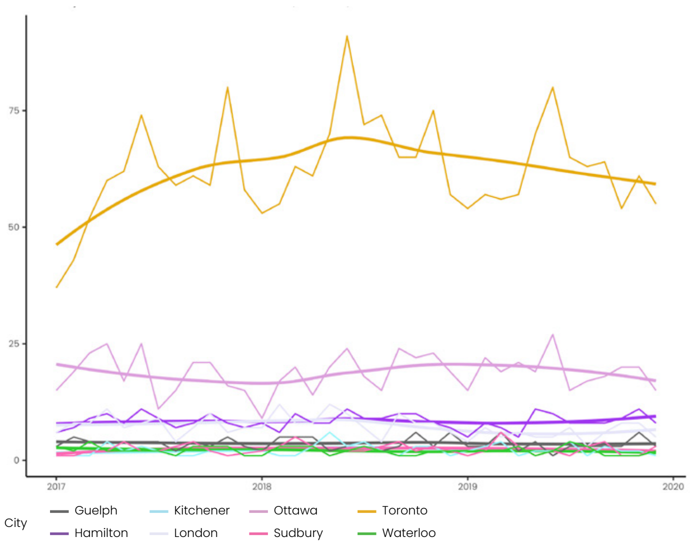
THE STATE OF ONTARIO'S LIVE MUSIC VENUES IN THE YEARS PRECEDING COVID-19

It was important for us to take the temperature and measure the health of live music venues in Ontario as we undertook our study, over two years after the onset of the pandemic. Pre-COVID, there was a strongly held belief within the music community that venues were under threat, in part due to high-profile, gentrification-driven closures, such as the Silver Dollar Room or Hugh's Room in Toronto, and news articles with alarming titles such as "Vanishing Music Venues"[5]. Our survey confirmed this perception has understandably persisted.

But what does the data say? *Are* we "losing all our venues," as is often the perception? Or are venue closures just a part of regular business churn? Historically speaking, in Toronto and Ontario cities, one club would go out of business — or stop booking live music — and a new space would spring up to fill its void.

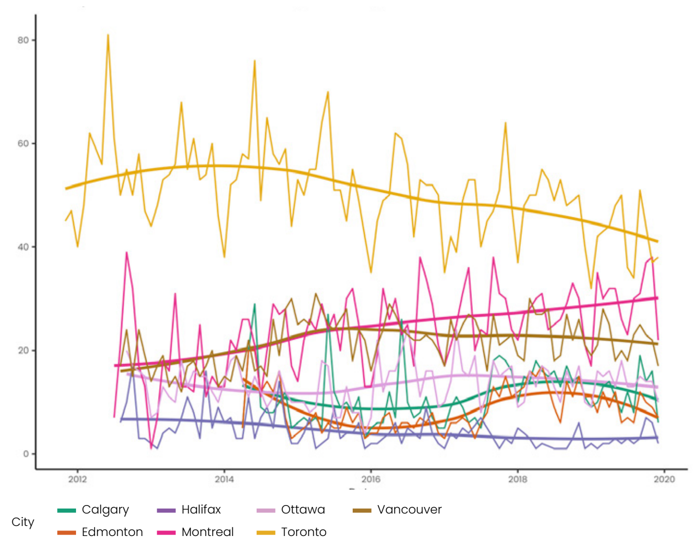
5 Gillis, Carla. "Vanishing music venues: three months into 2017 and we've already lost seven." *Now Magazine*. March 1, 2017. Available online: https://nowtoronto.com/music/vanishing-music-venues-three-months-into-2017-and-weve-already-lost-seven/

Monthly venues with at least one show (Exclaim) *Figure 3*



☛ *Note: this figure shows monthly trends in the number of venues with at least one show listed in Exclaim. Jagged lines show raw numbers, indicating seasonal dynamics, such as annual increase in active venues during the summer. The smooth lines adjust for such fluctuations to indicate longer-term patterns. For example, the tan line shows growth in active venues in Toronto into 2018 and then decline thereafter.*

Monthly venues with at least one show (Just Shows) *Figure 4*



☛ *Note: this figure shows monthly trends in the number of venues with at least one show listed in Just Shows. Jagged lines show raw numbers, indicating seasonal dynamics, such as annual increase in active venues during the summer. The smooth lines adjust for such fluctuations to indicate longer-term patterns. For example, the tan line shows decline in Toronto active venues starting around 2016 while active venues in Montreal (the pink line) increased.*

The late-'10s definitely saw the game change, with runaway commercial rents and high-rise residential development felling seven venues in Toronto during the first two months of 2017, as reported by *Now*[6]. But were *new* venues similarly squeezed out, as the narrative suggests? The 2016 openings of Drom Taberna and the Baby G were barely noted by local media, for instance. This section aims to gather data that allows us to go beyond anecdote and gain a high-level view of trends in live music venues in the years preceding the pandemic.

Charting trends in live music is difficult, however. Statistics Canada's census of business does not denote music venues as a distinct category, and so researchers must assemble the information themselves, often relying on industry-sponsored surveys. For example, in a 2015 study, Nordicity estimated that in 2013 there were 1,240 total companies operating in the live music industry in Ontario as well as 616 venues[7]. In 2020, Nordicity's researchers estimated there were 536 active venues in Toronto (pre-COVID). The City of Toronto Music Office currently lists 190 music venues on its online directory. Assembling these estimates is labour-intensive, and results are not always in agreement with another, all of which increases the challenge of tracking them over time. Moreover, most studies, due to data limitations, lump all venues together, or break them up into categories by size.

A first key contribution of our report is to assemble information from alternative data sources that allow a more expansive and richer view into the live music field. Our goal in compiling this information is to provide a unique read on the state of live music venues in the years preceding the COVID-19 pandemic. This analysis of the state of the sector provides background for an examination of challenges that pre-existed the pandemic, as well as a launching point for investigating a range of new models that emerged from our survey and interviews.

With these broad goals in mind, this section asks four specific questions:

- What are the overall trends in the Ontario live music sector in terms of the number of venues and shows, as well as their price and attendance?
- How do these trends vary across cities, and in comparison to elsewhere in Canada?
- What are the types of music venues that Toronto offers, as revealed by Yelp user reviews?
- To what extent do Yelp user reviews predict music venue resiliency in the face of the pandemic shutdowns?

What are the overall trends in the Ontario live music sector in terms of the number of venues, shows, as well as their price and attendance?

How do these trends vary across cities, and in comparison to elsewhere in Canada?

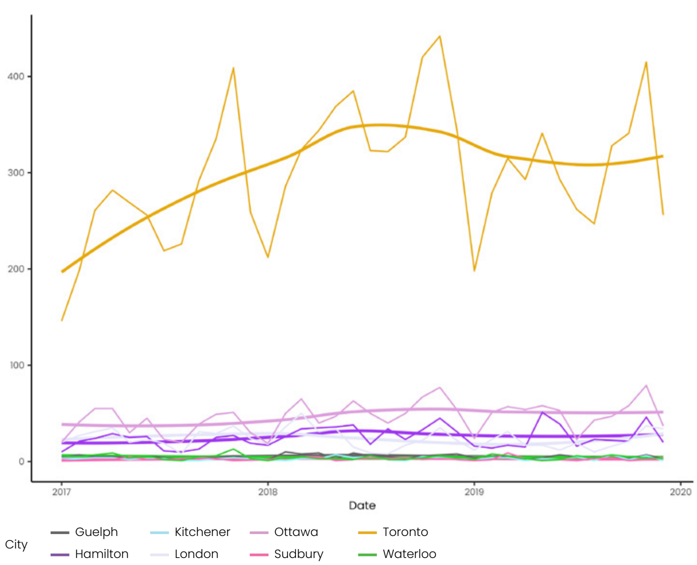
To answer these questions, data from online concert listings on Just Shows and Exclaim! provide crucial insight. In contrast to most other sources in prior reports, these sources show not only the number of *venues* in a given jurisdiction, but also the number of concerts or *shows*, which indicates the intensity of live musical activity in a given area. Simple venue-based data collection does not distinguish between an active venue

6 Ibid.

7 Nordicity. *Live Music Measures Up: An Economic Impact Analysis of Live Music in Ontario*. 2015. Available online: https://musiccanada.com/wp-content/uploads/2015/12/Live-Music-Measures-Up.pdf

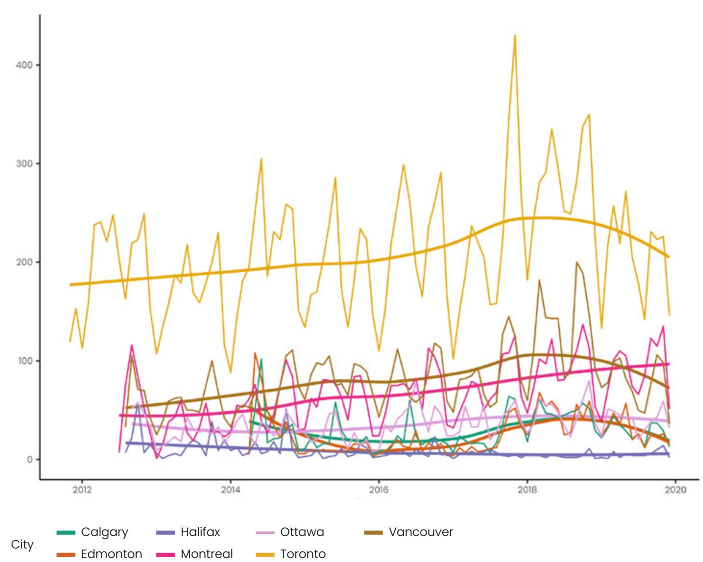
Monthly total shows (Exclaim)

Figure 5



Monthly total shows (Just Shows)

Figure 6



These figures show monthly trends in total shows listed in Exclaim! and Just Shows. Jagged lines show raw numbers, indicating seasonal dynamics, such as annual increase in active venues during the summer. The smooth lines adjust for such fluctuations to indicate longer-term patterns.

that is open seven nights a week or another that may only host music sporadically. (It is worth noting the limitations of the data here, as these sites' listings may exclude genres and communities that are not engaged with them.)

Total active venues in Ontario declined prior to COVID, especially in Toronto. Figures 3 and 4 show monthly trends in the total number of venues with at least one show listed on the two platforms. In general, province-wide total active venues on Exclaim! (not shown) range from a high of 222 in June 2018 to a low of 100 in January 2019; on Just Shows, the high was 91 in June 2014 and the (pre-COVID) low was 31 in January 2020. Totals as expected are lower than those from surveys or the City of Toronto's directory (though we note that these sources do not incorporate activity information).

Nevertheless, what is most striking about Figures 3 and 4 is the trends: both data sources show a steady decline in the number of active venues. On Just Shows, the decline starts around 2014; on Exclaim!, in 2018. In both cases, the drop is steepest in Toronto. By contrast, active venues in other Ontario cities remained relatively steady throughout. Looking outside Ontario, active venues in Montreal grew after 2016 (on Just Shows) and remained stable from 2016 in Vancouver. These results give a first indication that the challenges faced by Ontario music venues are strongly concentrated in Toronto.

Figures 5 and 6 add information about trends in the total number of monthly shows listed on these platforms.

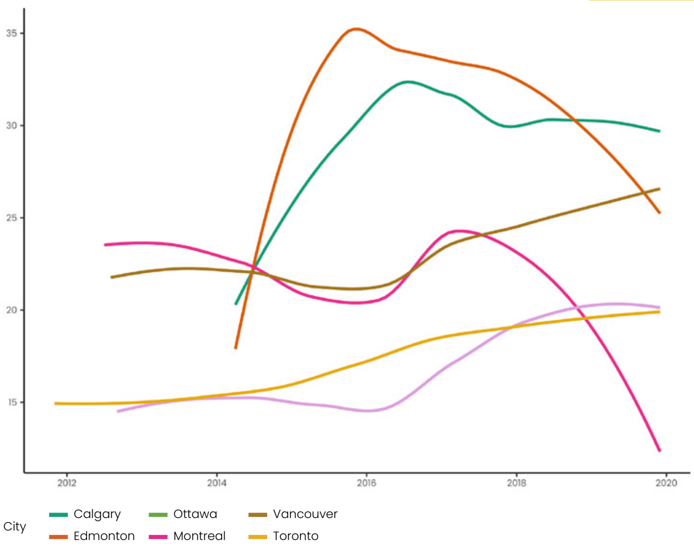
Total shows peaked around 2018, and then declined. Total shows reveal similar patterns. *Exclaim!* saw a peak of 683 shows listed in November 2018; Just Shows peaked at 490 in November 2017. Both saw declines from those peaks, and those declines were largely localized in Toronto. Calgary and Edmonton (as well as Vancouver) also experienced some declines in Just Shows listings during the tail end of this period. At the same time, Montreal's listings grew along with their growth in active venues.

In Ontario, ticket prices increased while sold-out shows decreased. While the number of venues and shows in Ontario declined in recent years, Figure 7 shows that average ticket prices grew (at least on Just Shows, where this information is parsable). Notably, this growth was restricted to Ontario cities: ticket prices declined in all cities outside of Ontario, especially Montreal. At the same time, as shown in Figure 8, the percentage of shows selling out also declined markedly in Toronto, though Ottawa saw a recent rebound.

While these results are not definitive due to the data limitations noted above, they do align with much anecdotal experience, as well as sentiments expressed by our survey respondents (see below). Overall, we find that both in terms of venues and shows, prior to COVID the live music sector in Ontario was already contracting, and that contraction was strongest in Toronto. Moreover, ticket prices are increasing even as it becomes more difficult to fill venues. Given that Toronto had been showing strong growth in its arts and cultural offerings and industries from the 2000s, these recent trends show a reversal of fortune for the music sector, one that demands serious attention.

Monthly average ticket price (Just Shows)

Figure 7



☛ *Note: This figure shows smoothed trends in monthly average ticket prices for shows listed on Just Shows. The blue line shows trends in Toronto, which had average ticket prices around $15 through 2014 before increasing to around $20 by 2020. Even so, ticket prices in Toronto (among shows listed in Just Shows) are considerably lower than those in Calgary (teal line), Edmonton (rust line) and Vancouver (brown line).*

What are the types of music venues that Toronto offers, as revealed by Yelp user reviews?

"Tell us how you *really* feel!" Most studies of music venues do not distinguish types of venues, or rely on gross indicators such as size. While useful, these measures do not really capture the typical audience experience of the specific qualities that venues offer. To provide a richer view of the live music landscape in Toronto, we turned to Yelp. Yelp reviews give us a read on how the public views venues, by way of how reviewers talk about venues on the platform. Using a technique called topic modelling, we extracted 12 typical "topics" in reviews. The "topics" are common clusters or combinations of words, which represent underlying styles of speaking about music venues in Toronto.

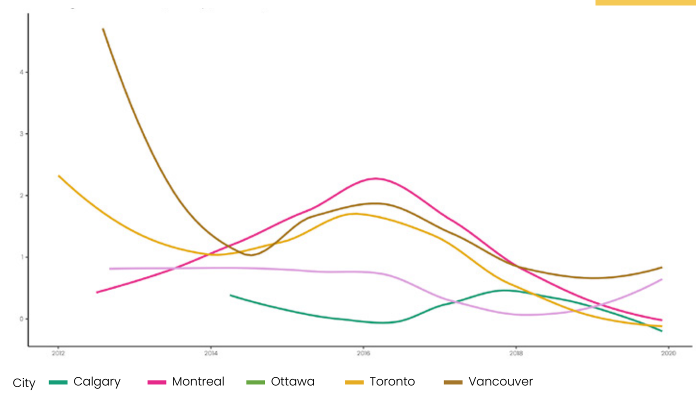
Figure 9 (following page) shows the 12 topics.

Looking at the topics, we see that businesses listed as "music venues" in Yelp fall into a handful of different types. Some are focused on other activities, such as eating, drinking, dancing, or socializing, where music plays a supportive role in creating a good atmosphere. Yelp-reviewed venues do not exclusively feature live music, and can include karaoke bars or pubs with background music. Still, many familiar players on Toronto's main circuit of live venues are reviewed for their sound, sightlines, service, and other qualities.

For example, "Good Show Place" is, as the name implies, simply a great place to hear live music, and includes such examples as the Tranzac, the Horseshoe Tavern, and Roy Thomson Hall, with keywords including "live," "music," "amazing," "night," "friendly," and "venue." Another topic,

Percentage of shows sold out, monthly (Just Shows)

Figure 8



☛ *Note: This figure shows trends in the monthly percentage of total shows listed on Just Shows that sold out. For example, the tan line (representing Toronto) shows that after peaking in 2016 fewer shows sold out.*

"Nice Venue," groups together halls with fantastic sound quality, seating and sightlines, such as Massey Hall, Trinity St. Paul's United Church, and the Danforth Music Hall ("stage," "acoustics," "pretty," "view"). Meanwhile, "Fun Times, Dancing" was a collection of clubs where attendees loved to go out dancing to various styles of music, e.g., Lula Lounge, Bassline, and Clinton's Tavern ("fun," "night," "dance," "drinks," "crowd"). Since Yelp is a user-generated review site, there will inevitably be bad reviews, and the three topics conveying negative experiences were related to poor treatment by servers or security staff — or simply a "bad vibe" from the crowd.

To what extent do Yelp user reviews predict music venue resiliency in the face of the pandemic shutdowns?

So far, our analysis has focused on the state of live music prior to the pandemic. While live music was already facing challenges, COVID-19 posed an existential threat. Government support allowed many venues and musicians to weather the storm, but not all. Why did some venues survive the pandemic and others not? Answering this question gives some indication about sources of venue sustainability and resiliency, and could guide thinking about the direction of the sector as it reshapes itself in a post-COVID world.

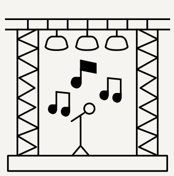
Yelp data turns out to be a surprisingly powerful source of insight with respect to these questions. By assessing the current status of the businesses, based on Google Business Profile listings and venue websites, we can determine if venues are active or defunct as of 2023 (compared to the pre-COVID time of Yelp data collection).[8]

Too "nice" to fail?: Most interestingly, almost all of the Top 20 businesses in the "Nice Venue" list are extant, as of this writing. The majority of these spaces are well-established, either not-for-profit institutions (the Music Gallery, Massey Hall, Roy Thomson Hall, Royal Conservatory of Music, Harbourfront Centre) or major commercial clubs or stadia (the Danforth

8 Some spaces are still in business but no longer booking live music (e.g. Whippersnapper Gallery) while the status of others is uncertain (e.g. Lola's Mississauga).

12 types of Toronto music venues, by Yelp topic modelling

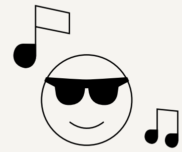
Figure 9



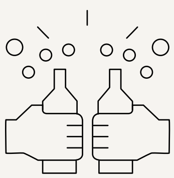
Good Show Place
(top keywords: music, Toronto, staff, live, time; also: amazing, night, space, venue, stage, friendly)

Nice Venue
(top keywords: venue, sound, concert, stage, seats; also: hall, music, acoustics, view, pretty)

Fun Times, Dancing
(top keywords: night, dance, music, fun, people; also: band, crowd, drinks, live, DJ)

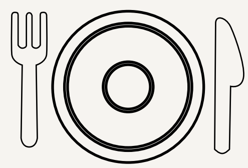


Good Show Place, Chill Edition
(top keywords: bar, music, tequila, live, night; also: patio, jazz, friendly, nice, awesome)



Fun/Chill Hangout
(top keywords: pool, music, bar, night, time; also: patio, drinks, live, hall, cool)

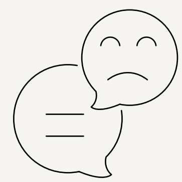
Good Night Out
(top keywords: beer, food, selection, menu, service; also: pub, atmosphere, nice, friendly, decent)



Good Show and Food Pairing
(top keywords: brunch, food, jazz, music, service; also: Sunday, friendly, bluegrass, people, coffee)

Good Drinking Place
(top keywords: bar, drinks, service, bartender, cheap)

Good Place to Eat
(top keywords: food, chicken, cheese, menu, service)



Negative Experience
(top keywords: service, review, terms, removed, venue; also: violating, security, experience, line, check)

Bad Vibes
(top keywords: people, don't, friend, rude, told; also: bouncer, security, wouldn't, didn't, card)

Bad Service (top keywords: table, food, time, minutes, people)

Music Hall, the Opera House, Budweiser Stage, Lee's Palace). Only one club under 500 capacity can be found on this list (the Baby G). The only venue that did close was jazz and classical performance space Gallery 345, which was run as a passion project and whose operator made the decision to shut down in 2019 once its building went on the market.[9]

What does this tell us? Is it simply that some halls are "too big to fail"? A likely factor is that arts institutions and entertainment companies of a certain size were more likely to qualify for and access COVID emergency funding and subsidies than smaller businesses or DIY ventures, giving them the necessary financial cushion to weather the pandemic. Since venues reopened at full capacity in spring 2022, we have seen increased market capitalization within the live music sector, with a trend toward larger-capacity new venues opening or reopening in Toronto, such as History (the new, state-of-the-art 2,500-capacity club run by Live Nation) and the multi-million dollar renovations of Massey Hall and the El Mocambo.

"Good" may not be good enough — for bars. The topics with the highest number of closures in the top 20 were "Good Show Place, Chill Edition" and "Fun Times, Dancing" (tied for 45% each) and "Good Show Place" and "Good Drinking Place" (tied for 35% each). The vast majority of this concentration of closures were among bars and nightclubs. A handful were small galleries that either closed their doors or stopped hosting concerts.

9 Wassenberg, Anya. "The Scoop: Community devastated as Toronto loses an essential venue." *Ludwig Van Toronto*. July 6, 2019. Available online: https://www.ludwig-van.com/toronto/2019/07/06/the-scoop-community-devastated-as-toronto-loses-an-essential-classical-music-venue/

Massey Hall, Toronto. Photo: Nephron

Many of these closures were directly related to COVID, notably Kensington Market dance club the Boat (#1 on the “Fun Times, Dancing” list) and its next-door neighbour, 2SLGBTQ+ club Round Venue. 2SLGBTQ+ community spaces were among the hardest-hit during the pandemic. Many of these spaces were already operating on thin profit margins and among those under the greatest rent pressures. Some experienced difficulties with unsympathetic landlords or insurance providers during the pandemic — with some Ontario operators seeing insurance rates rise by as much as 4,000%[10] — as well as being ineligible for government funding or unsuccessful in accessing emergency subsidies. Many bar operators are also passion-driven, and the pandemic motivated some to make life changes and get out of the business.

These results underscore the fragility of the model by which music venues depend upon bar sales for their existence and the importance of imagining alternatives.

10 CBC News. “‘Untenable’ insurance policies could silence live music venues.” Nov. 28, 2021. Available online: https://www.cbc.ca/news/canada/ottawa/ottawa-ontario-music-industry-insurance-live-shows-1.6264269

“Bad” may just be “good enough.” It’s also worth noting that in the “bad” or “negative” review topics, a surprising number of venues survived: these categories saw only a 20-30% closure rate; still high, but not as severe as other categories. Many of the establishments rated poorly — for negative experiences with hostile security staff or long coat-check lines, for example — are larger, 2,500+ capacity venues. Audience members may enter with higher expectations and leave with more antipathy if they have a bad experience — especially if they’re more likely to see exclusively bigger-name artists and the pool of venues they are thus likely to attend is smaller. Since Toronto has only a small number of high-capacity halls — many of which we have noted are too big to fail — fans of more-established artists often have no choice but to endure unpleasant concert-going experiences in order to see their favourite artists perform live. This is one indicator of a “market mismatch” with live music in Ontario: a failure of the market to deliver an optimal experience for both consumers (audiences) and producers (artists and presenters).

The Matador Club, Toronto (now defunct). Photo: Francis Mariani

DOORS CLOSED:

COVID-19 AS A CRITICAL JUNCTURE FOR LIVE MUSIC IN ONTARIO

Pulling the above together, there is a clear pattern. Medium-to-large established venues could survive COVID regardless of their perceived quality. By contrast, smaller venues without public support were already operating on the edge, and COVID was often the push over the cliff — regardless of their quality. These are indications of an ecosystem where the pieces do not fully fit: competition at the top (large) end is not great enough for consumer feedback to promote quality, and margins at the low (small) end are too small for producers to operate much beyond survival mode. Fresh models are needed.

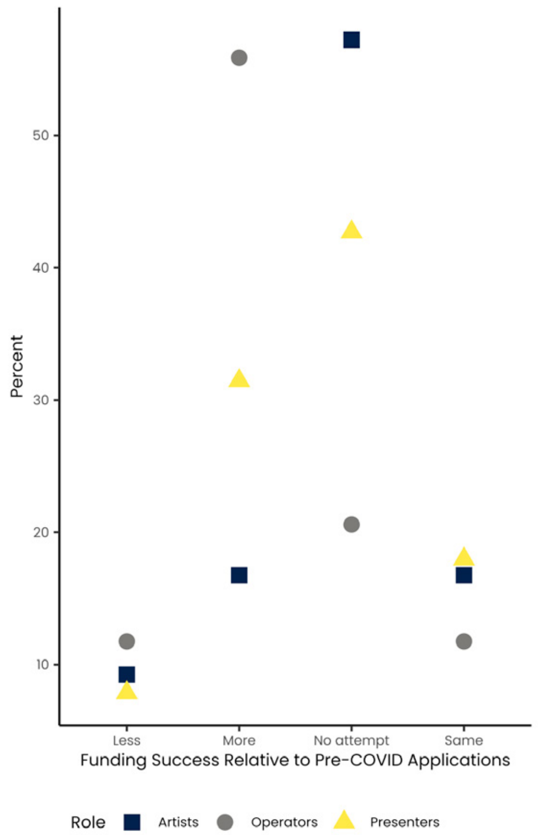
COVID-19 was a critical juncture for reimagining music venues. Our survey asked several questions to probe how musicians, presenters, operators, and audience members experienced the pandemic.

PUBLIC FUNDING FOR VENUE OPERATORS AND PROMOTERS

Perhaps one of the most significant aspects of the pandemic response was that it provided substantial public funds to venue operators and promoters, many of whom operate as for-profit businesses and therefore do not qualify for traditional Canadian arts funding. In addition to emergency subsidies such as CEWS (Canada Emergency Wage Subsidy) and CERB (Canada Emergency Response Benefit), new programs were rolled out, such as the Canada Arts and Culture Recovery Program (CACRP)'s Support to Music Venues and Concert Promoters component, which was administered through FACTOR and the Canada Music Fund (CMF) in 2022/23.

Grant funding success during COVID, by role

Figure 10



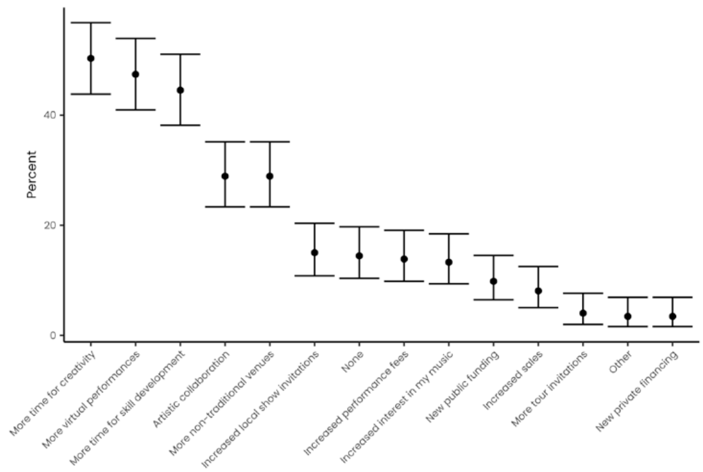
☛ *Note: This figure shows respondents grant funding success relative to pre-COVID applications, by role. For example, over 50% of artists did not apply for grants, whereas over 80% of owner/operators did.*

Strikingly, over 50% of venue owners/operators and 30% of presenters enjoyed more success in accessing public funds than in the past. Owners/operators were also much less likely than the other roles to have made no attempt. As far as emergency subsidies (CERB, CEWS), about 50% of all respondents received them, compared to 90% of responding owners/operators. Just as notable is the diversity of sources that respondents accessed. Among presenters that applied for funds, over 45% received support from FACTOR, 40% from the Canada Council for the Arts, 40% from the Ontario Arts Council, and 30% from the Department of Canadian Heritage.

Success rates among artists were lower (30% successful) and their funding came largely from FACTOR and the arts councils. Among owner/operators, over 50% received support funding from FACTOR, 40% from Canadian Heritage, 30% from the Ontario Arts Council, and 20% from the Ontario Ministry of Heritage, Sport, Tourism, and Cultural Industries. In the past, funding from programs such as FACTOR has largely flowed to artists for the purposes of recording and to some extent touring, so 2022–23's expansion of grant access to live music directly — and in particular, for-profit businesses such as grassroots venues — marks a watershed moment in the history of public funding of music in Ontario.

Top three new opportunities for artists during COVID

Figure 11



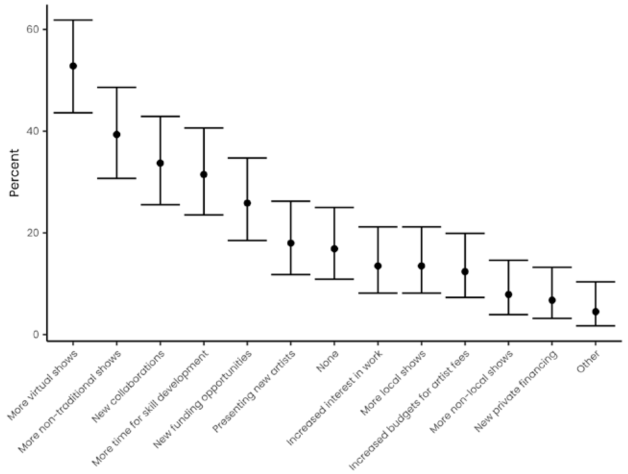
☛ *Note: this figure shows what artists considered to be the most important opportunities opened up during COVID. Respondents were shown the full set of categories listed on the x-axis, and were invited to select the top 3 most important to them (with an option to write in others). For each opportunity, the dot shows the percentage of respondents who placed it among their top 3 choices. The whiskers around the dots show 90% confidence intervals, indicating a 90% chance that the true value lies in that interval.*

Opportunities out of crisis. The pandemic was a time of great hardship. But it also provided time for many respondents to explore creative opportunities.

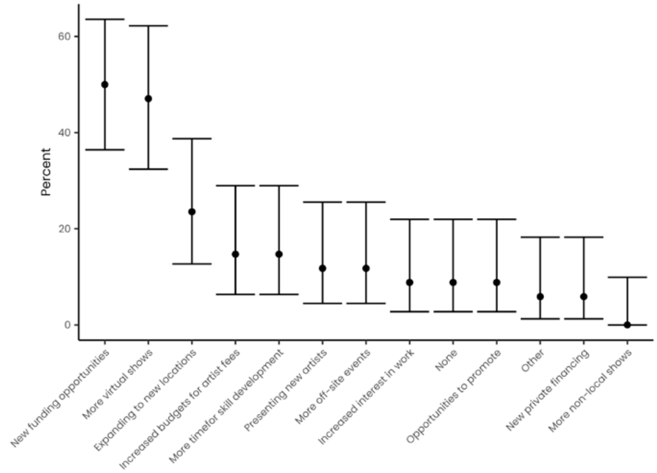
For artists (Figure 11), many (around 50%) had more time for creativity, to develop skills (around 45%), and to perform virtually (around 45%) compared to before the pandemic. About 30% found opportunities for new collaborations, and to perform outdoors or in non traditional spaces (e.g., parks). Presenters (Figure 12) also often found opportunities in virtual shows, but many also pursued non-traditional spaces (40%), new collaborations (35%), and new skills development (30%). While owners/operators (Figure 13) also pivoted to virtual shows, they stood out again for accessing new funding opportunities (50%), as well as by expanding to new locations.

Taken as a whole, these results illuminate the mood among respondents in the early days of reopening when we conducted our survey. The live music sector had been in a protracted period of adjustment and challenge, and the pandemic offered the chance to rethink and redirect energies. Parts of the sector gained access to new funding sources, and after a period of gaining new skills, pursuing new collaborations, and exploring the possibilities (and limits) of virtual engagement, there was a hunger to reimagine music venues.

Top three new opportunities for presenters during COVID *Figure 12*



Top three new opportunities for owner/operators during COVID *Figure 13*



Note: these figures show what presenters and owner/operators considered to be the most important opportunities opened up during COVID. Respondents were shown the full set of categories listed on the x-axis, and were invited to select the top 3 most important to them (with an option to write in others). For each opportunity, the dot shows the percentage of respondents who placed it amount their top 3 choices. The whiskers around the dots show 90% confidence intervals, indicating a 90% chance that the true value lies in that interval.

BEYOND THE BOXES:
MORE THOUGHTS ON COVID + FUNDING

Survey respondents had a lot to say about their experiences with the pandemic and applying for funding or emergency support. Topic modelling revealed common themes emerging from write-in comments related to these survey questions:

1. **Accessing funding was still a challenge**
20% of survey respondents who provided write-in commentary (about 6% of total respondents) shared that they were unsuccessful in receiving grants or subsidies, or simply did not apply at all. Reasons cited for not engaging included ineligibility, competition, time-consuming forms and reporting requirements, and feeling intimidated by the process. "I gave up on trying to secure financial support," said one respondent, "because I couldn't handle the paperwork and bureaucracy."

2. **CERB provided stability**
10% of commenters (about 3% of respondents) across various roles shared that CERB (the Canada Emergency Response Benefit) provided a previously unknown level of financial stability, and the ongoing support improved their well-being and gave them free time to pursue creative projects and upgrade skills, reinforcing survey findings.

3. **"The funding helped, but…"**
7% of commenters (about 2% of respondents) acknowledged the financial assistance was beneficial, but with caveats. "Many of the applications were deployed extremely fast with very little notice, sometimes less than four weeks," shared one presenter. A mid-career artist recognized that they were successful, but they "understand how the system works. I think that if I was younger and less experienced, it would be a very different story."

4. **Not all silver linings**
COVID was still a tough time for many people, a feeling shared by 5% of commenters (about 1.5% of respondents). "I felt a bit baited on the question asking what good things came out of the pandemic closures," observed one artist.

Barrymore's, Ottawa. Photo: Jean Gagnon

SETTING THE SCENE:
TAKING THE TEMPERATURE OF ONTARIO'S MUSIC CITIES

Ontario is much more than just Toronto. For this province-wide study, we compared and contrasted Ontario's major "music cities" — urban areas with significant local music scenes, economies and ecosystems. Using survey data, mapping data and insights gleaned from field research and stakeholder interviews, we were able to highlight the comparative challenges and opportunities within these six cities.

We aimed for diverse geographical representation by including most of Ontario's major regions: the GTHA (Toronto and Hamilton), Southwestern Ontario (London and Guelph), Eastern Ontario (Ottawa) and Northern Ontario (Greater Sudbury). Despite the province's large area, these cities are all located less than a day's drive apart. For musicians, Ontario offers one of the country's most economical touring networks — rivalled only by its neighbour Quebec. Yet, our six cities show a great disparity in terms of the respective health of their local music ecosystems. For detailed "scene reports" from our six cities, please visit pg. 66.

KEY TAKEAWAYS FROM ONTARIO MUSIC CITIES' TEMPERATURE CHECKS:

1. **Venues are usually clustered downtown — but one city shows the potential of neighbourhood dispersal.**

   Mapping data indicates that across the province, venues and shows are clustered in the downtown areas of cities, which are generally more walkable or transit-accessible, creating an interconnected network of venues — in other words, a "scene." In Toronto, this follows the city's east-west grid pattern and, for mostly historical reasons, favours the west end. The City of Guelph's venue network is almost entirely located within its small, historic downtown. This indicates the potential for more geographically dispersed concert activity in Ontario cities.

   But one city bucks this trend: Ottawa sees its music venues distributed more evenly across the map, with many located in neighbourhoods such as the Glebe, Centretown or Nepean. This distinction is likely due to a more commuter-based, civil-servant culture. Our survey results reflect Ottawa's distinctiveness: stakeholders value the vitality that venues bring to their neighbourhoods more than their counterparts in other cities, and most felt its stages reflected the diversity of its community. Ottawa's artists and presenters are also more engaged with equity issues such as fair pay and all-ages accessibility.

2. **Reluctant audiences, underpaid artists.**

   Across the province, city-specific survey data reflects our primary finding: a dysfunctional market for live music, where artists feel they are underpaid, yet audiences think ticket prices are too high — and an artist's "market value" is directly related to how many tickets they can sell. High ticket prices were audiences' #1 barrier in both Toronto and Hamilton. Venue operators in Hamilton confirmed a reluctant paying audience in their market, and a preference for free events. In Ottawa, audiences' top barrier was not hearing the styles of music they like programmed in their area, indicating a sense of alienation somewhat shared by the city's artists.

   Artists identified payment-related issues as their top concern in all three aforementioned cities, pointing to inadequate compensation in Ottawa, and in Toronto and Hamilton through worries about expectation of draw, as lacklustre attendance negatively impacts both payout and attaining repeat bookings. A shrinking audience for live music was identified as the top concern by venue operators everywhere except Toronto, where a suite of "big-city" concerns (rent, insurance, noise) were paramount. Across Ontario and across roles, the long-entrenched system of artist compensation being directly proportional to paid attendance is perceived as broken.

El Mocambo, Toronto. Photo: Vlad Podvorny

3. **Vanishing venues affect local scene morale.**

   Smaller cities outside Toronto have seen varying effects of the pandemic and gentrification on their venue infrastructure. Some have seen their networks of grassroots venues decimated, such as Guelph and London, hollowing out their pools of local talent. As stakeholder interviews showed, this has resulted in low morale and burnout amongst DIY presenters and organizers. The Guelph community in particular feels abandoned by an indifferent local government, and though London has a Music Office and UNESCO City of Music designation, it's unclear what impact this has made on its grassroots music scene.

   By contrast, Ottawa and Hamilton have maintained healthier venue networks, in spite of some key closures pre- and post-pandemic. Stakeholders in both cities expressed a spirit of "can-do" optimism about the future of their local music scenes. In Toronto, meanwhile, excitement about new or renewed venues such as History, Massey Hall or El Mocambo is tempered with concerns over a shift toward the dominance of larger, corporate or institutional spaces — a trend backed up by our Yelp data indicating halls of a certain size were "too big to fail" during the pandemic.

National Arts Centre, Ottawa. Photo: Taxiarchos228 aka Wladyslaw

4. **Partnerships are key: supportive yet hands-off municipalities can empower local artistic communities.**

   Ottawa and Hamilton stand out as examples of the value of partnerships, either between community members or between municipalities and music scenes. In Hamilton, a partnership between the City and Sonic Unyon Records resulted in animating a vacant building to create a new venue, Bridgeworks.

   Ottawa is exemplary for a city acting as a hands-off, supportive institution: successful civic arts partnerships include Arts Court, home of artist-run Club SAW; the National Arts Centre's Fourth Stage; and the outdoor City Sounds, organized by OMIC (Ottawa Music Industry Coalition) and local BIAs. Ottawa survey respondents were most enthusiastic about seeing events in publicly owned spaces such as libraries or museums, perhaps related to the success of such public institutions. Yet Ottawa was also the most open to private business partnerships, such as venues sharing space with micro-breweries or tech companies, displaying a sense of civic entrepreneurship.

   And in Toronto, the It's Ok* Studios, a Black-run multi-arts space, is a promising example of a creative partnership between the City and a DIY arts group. Toronto also stands out with the highest survey interest in seeing live music in private outdoor spaces such as parking lots or commercial squares, and in seeing the development of a "music centre" — a building with multiple, exclusively music-focused uses, such as venues, rehearsal spaces, recording studios, workshops, and networking spaces — reflecting big-city specialization and the city's rehearsal-space crisis.

5. **Music Office? The jury is out.**

   Music Offices are official city departments that act as intermediaries between the music scene and the municipality, and aim to support the local music industry as a whole. Their existence is a relatively new development within the last decade, with Toronto leading the way by hiring a Music Sector Development Officer in 2013, and London following suit in 2015. There are still only three such positions across the province, the third being part of CION (Cultural Industries Ontario North) in Sudbury.

   As these offices are all understaffed, it is difficult to ascertain their efficacy, and more study is needed to assess their impacts on their respective communities. Music Sector Development Officers also typically act as staff lead to volunteer councils, such as the Toronto Music Advisory Committee. Ottawa has demonstrated the value of an alternative, community-based approach through OMIC, which is an artist-driven, member-based association that fulfills many of the objectives of a city-run Music Office.

Pique @ Club SAW, Ottawa. Photo: Ming Wu

THE ONTARIO LIVE MUSIC ECOSYSTEM:

PERCEPTIONS, BARRIERS, AND ALTERNATIVES

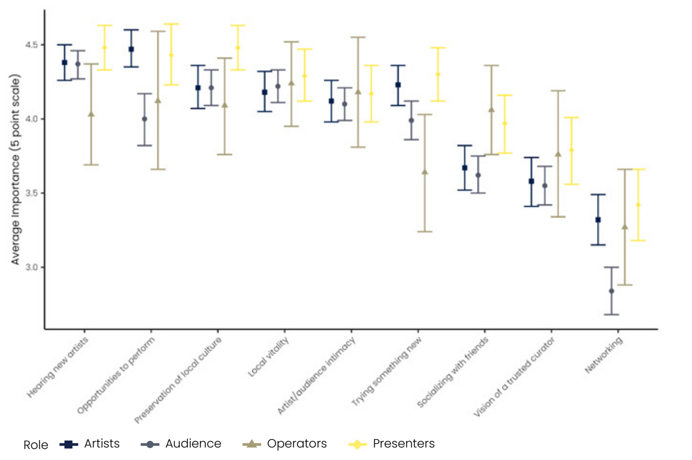
Conducted in the wake of the critical juncture opened up by COVID-19, our survey aimed to probe Ontario live music participants about the present and possible futures of the sector. In this section, we report on their responses to three key types of questions. (See Appendix pg. 90 for the full list of survey questions.)

1. Perceptions about the current state and value of live music in Ontario.
2. Barriers or challenges faced by audiences, artists, presenters, and owner/operators.
3. Views about emerging or alternative venue spaces, models, and features.

PERCEPTIONS ABOUT THE CURRENT STATE AND VALUE OF LIVE MUSIC IN ONTARIO

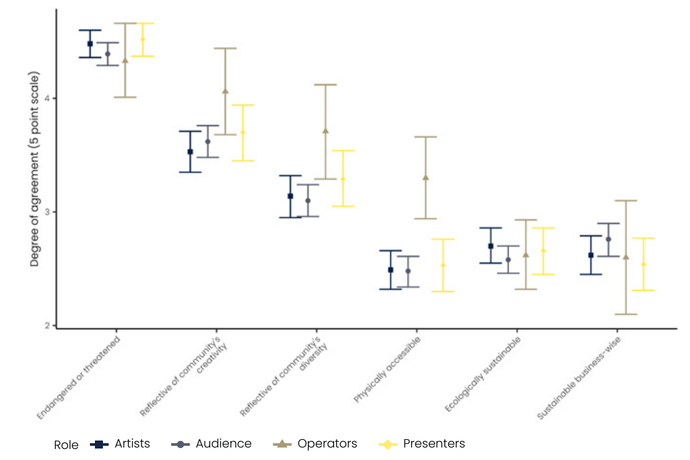
Venues are valued for new music and their contributions to communities.
Figure 14 shows the aspects of music venues most valued by respondents. Results are averages for each role, on a five-point scale. Values rated 3 and above indicate the average respondent (for that group) found a given feature to be "important" or "extremely important," whereas values below 3 indicate the average response tended toward being "slightly important" or "not at all important."

How important are these aspects of live music to you...? *Figure 14*



☛ *Note: this figure shows how important various aspects of live music are to respondents, by role, on a five-point scale, where 1 indicates the least and 5 indicates the most important. Dots show average values, meaning that for example a value over 4 indicates that the average respondent found that aspect of live music to be very important. The whiskers around the dots show 90% confidence intervals.*

Do you perceive live music in your community or local area to be...? *Figure 15*



☛ *Note: this figure shows how respondents perceive live music in their communities, by role, on a five-point scale, where 1 indicates the least and 5 indicates the most important. Dots show average values, meaning that for example a value over 4 indicates that the average respondent found that aspect of live music to be very important. The whiskers around the dots show 90% confidence intervals.*

The overall pattern in Figure 14 is clear: respondents highly value live music across a range of attributes. More interesting is the fact that venues are valued both for their direct musical offerings and their broader community significance. In terms of musical experience, artists, audiences, and presenters all rank “hearing new artists/musicians perform” as the most important feature. They also agree in highly valuing (average >4) smaller spaces that offer the chance to establish close intimate relationships between audience and performer, in ways that likely go beyond what is possible in digital formats or at larger venues. Artists and promoters in particular value them both for performance opportunities and to experiment with new styles. Presenters and operators are more likely to see venues as important places for professional networking and socializing with friends. These results speak to the **central role that a thriving venue ecosystem plays in incubating and disseminating new musical talent and ideas.**

Music venues as quasi-public goods. Beyond their value for musical experimentation and talent incubation, music venues are valued for their place in local communities. Specifically, respondents gave high marks (average ~4.25) to music venues for bringing vitality to neighbourhoods and cities, and for preserving local cultural memory. Presenters in particular view music venues as key repositories for local histories. Respondents agree that venues are crucial for hearing new music in a special setting that connects audiences and performers, but also that such settings mean more than the music alone. While music venues are not pure public goods, similar to the R&D and education sectors, they generate positive spillovers that have great value for the wider public. The challenges faced by the live music ecosystem in Ontario are therefore a threat not only to that ecosystem itself but to the positive benefits it generates for others.

Ontario venues reflect the creativity of local communities, but their diversity is contested. Most respondents saw their local venues as being reflective of the creativity and talent that resides in their communities. On average, they also agreed that venues reflected their communities’ diversity. Still, respondents showed a lack of consensus on the question of diversity, with more than 30% agreeing and nearly 30% disagreeing that venues reflect their communities’ diversity. Moreover, owner/operators were generally more positive about how much their venues reflect community creativity and diversity than audiences, artists or presenters. These differences speak to ongoing challenges and debates in the musical community about whether music venues represent and include a diversity of styles, genres, and identities.

Ontario venues are threatened, inaccessible, and unsustainable. While respondents see great cultural and social value in music venues, they indicated a great deal of concern when asked about the current situation in their own Ontario communities. Here, respondents spoke in nearly one voice. **Over 75% agreed that music venues are endangered or threatened, and only about 5% disagreed.** Moreover, substantial majorities of respondents agreed that *Ontario’s music venues are neither sustainable from an economic (~15%) or ecological (<10%) point of view nor that they are physically accessible enough* (~15%). Owner/operators were the only group that tended to agree with the statement that their venues are physically accessible. This disconnect between how owner/operators perceive the accessibility of their venues versus how audiences, performers, and presenters do represents a significant issue for the sector in terms of establishing a common and shared perception of its challenges. Even so, the strong agreement on the sense of danger and the problems of sustainability indicate a widespread sense of urgency and need for concerted action.

BEYOND THE BOXES: THE VALUE OF VENUES

> "Youth showcases, all-ages venues, and DIY spaces are the most vital to setting up long-term development of the music and arts culture. Youth are on the cutting edge and predict the pulse of the culture."

Write-in commentary was very enthusiastic and generous throughout the survey. In addition to the options presented, respondents identified other valued aspects of live music venues which they expanded upon in the "other" box and optional additional comments. Through the use of topic modelling, we identified the following five additional qualities valued by community members:

1. **Accessibility**
   Accessibility was mentioned by some 45% of commenters (about 11% of respondents) as being of high importance, and used in several different contexts: physical accessibility or AODA compliance, accessibility to all ages, financial accessibility, and creating a safe environment for a diversity of ethnicities, genders and sexual orientations. This was summarized by one respondent as "Accessible space and programming for various needs and ages." Of the presented options, another wrote, "These aspects are an important part of live music, certainly, however as a disabled musician, I find most venues in [my] city inaccessible and downright unwelcoming."

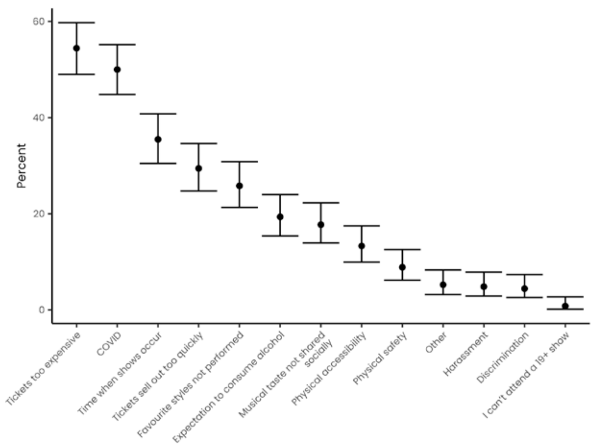
2. **Creating Community**
   Building upon the vitality that venues bring to community, around 15% of commenters (about 4% of respondents) valued the sense of community nurtured in performance spaces, citing specific examples such as the "opportunity to learn via workshops and talks."

3. **Everything Local**
   Promoting local culture was important to about 13% of commenters (about 3% of respondents), referring not just to local musicians but also local food, vendors, and ownership: "Showcasing local musicians and providing local opportunities in local communities!"

4. **Sound and Other Amenities**
   Good-quality sound, sufficient power, letting artists sell their own merch, access to water and "adequate" bathrooms, and backstage/crew hospitality were mentioned by around 11% of commenters (about 3% of respondents).

5. **Supporting a Living Wage**
   A handful (around 5% of commenters, 1.5% of respondents) prioritized "fair pay" or better pay for musicians as being of high importance. Or, as one boiled it down, "making a living."

Top three issues in attending music venues (audience) *Figure 16*



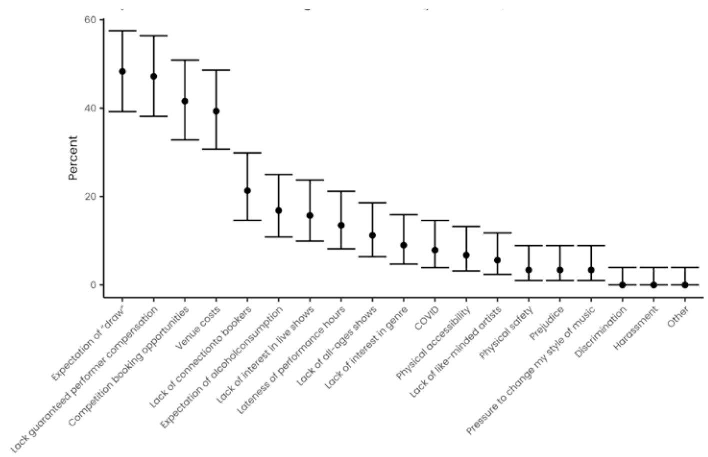
- *Note: Figures 16 show the most important issues faced by audience members when accessing music venues, based upon respondents' top three choices from a list (with an option to write in others). Dots show the percentage that show each option. The whiskers around the dots show 90% confidence intervals. Options have been condensed to save space; for example "Favourite styles not performed" was presented in the survey as "The styles of music I like are not performed live in my community." For the full list of survey questions,* *please see Appendix III, page 90.*

BARRIERS OR CHALLENGES FACED BY AUDIENCES, ARTISTS, PRESENTERS, AND OWNER/OPERATORS

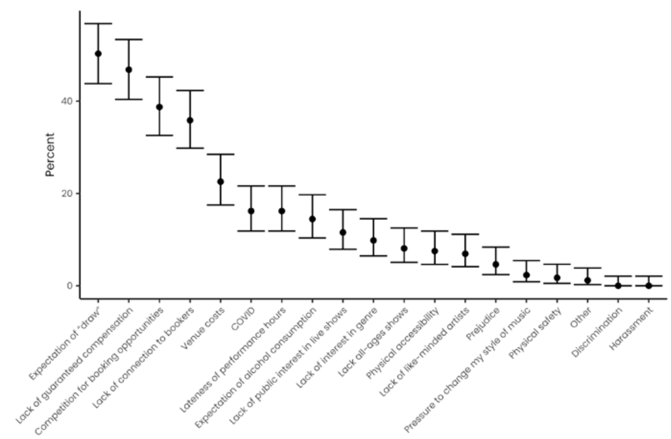
Market misalignment. While the sense of urgency is widely shared, diagnoses of the underlying issues differ across roles. These differences are most evident on economic matters. Almost 60% of audience members saw high ticket costs as a top barrier to attending live music events. At the same time, nearly 50% of artists and promoters/presenters alike saw lack of guaranteed compensation for performers to be their biggest challenge in accessing venues. Owner/operators for their part tended to cite high costs (from insurance, rent, inflation, or noise complaints) as well as shrinking audiences. Moreover, while artists and presenters felt a scarcity of booking opportunities was one of their largest challenges, owner/operators expressed concern about facing too much competition from other venues. Nearly 30% of audience members felt that a top issue was that the styles of music they enjoy are not offered in their community.

Taken together, these responses indicate a **fairly dysfunctional market for live music in Ontario**. Audiences feel they are paying too much, and many feel they are not seeing the kinds of music they wish to hear. Musicians feel they are paid too little, and owner/operators feel their costs are too high. Consumers worry about shows selling out too quickly, but producers worry they cannot draw audiences. *The sector generates value to the broader public, but is not in a position to capture that value itself in the form of adequate ticket sales or artist compensation.* Some 20% of artists, presenters, and audiences saw the current revenue model (relying on alcohol to cover venue costs) as a top 3 problem.

Top three issues in accessing music venues (presenters) *Figure 17*



Top three issues in accessing music venues (artist) *Figure 18*



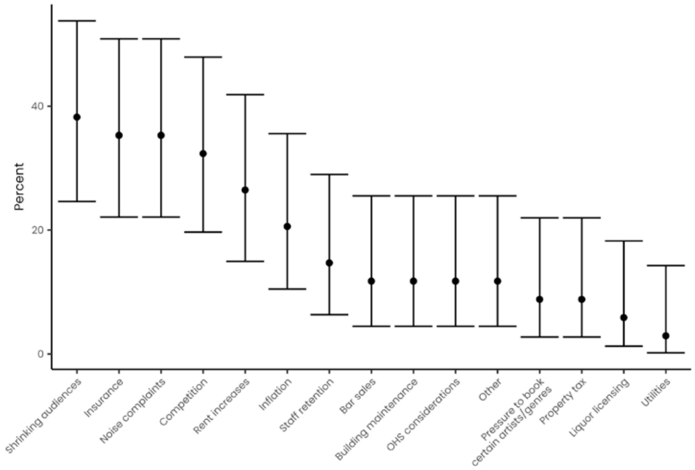
- *Note: the above two figures show the most important issues faced by artists and presenters when accessing music venues, based upon respondents' top three choices from a list (with an option to write in others). Dots show the percentage that show each option. The whiskers around the dots show 90% confidence intervals. Options have been condensed to save space; for example "Prejudice" was presented in the survey as "Prejudice against people from my community."*

  In these types of survey questions, issues such as physical safety, accessibility, prejudice, or harassment, are often not ranked as being of high importance as others, in that most respondents are speaking from their own experience. Most people are not disabled, and although many people will be disabled at some point in their lives, they may not yet have experienced disability. This, however, does not mean that physical accessibility is unimportant. The same goes for freedom from prejudice or harassment. Indeed, as we saw in Figure 15, respondents tend to perceive venues as physically inaccessible.

There are no quick fixes for these challenges. Many of the issues go well beyond this specific sector, most acutely rent/property affordability, insurance costs, and inflation. Some may reflect difficulties in updating public funding models in the wake of changes to the music economy produced by digital technologies. The shift we observed during COVID toward making public funding more accessible to live music may point toward a new direction of emergent trends. Our recommendations discuss possible ways to build on these trends, and for how more general land-use policy reforms would also invigorate the live music market.

Top three issues as a venue operator

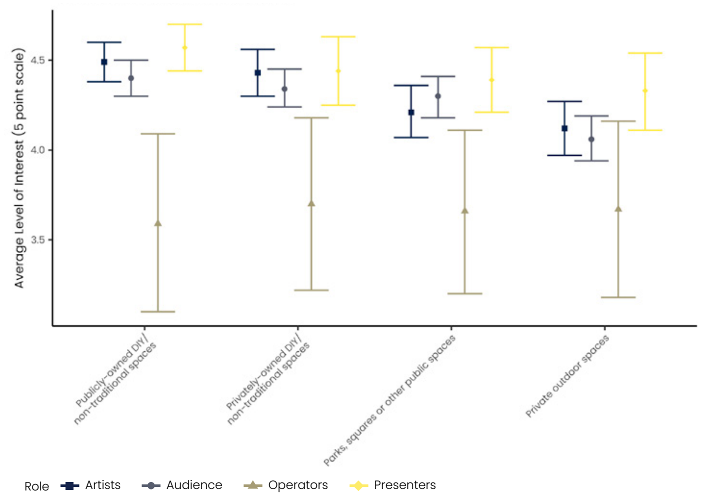
Figure 19



- *Note: this figure shows the most important issues faced by venue operators when accessing music venues, based upon respondents' top three choices from a list (with an option to write in others). Dots show the percentage that show each option. The whiskers around the dots show 90% confidence intervals. Options have been condensed to save space; for example "Competition" was presented in the survey as "Competition with other venues or promoters." For the full list of survey questions, please see Appendix III, page 90.*

How interested would you be in seeing more of the following types of spaces used for live music presentation?

Figure 20



- *Note: This figure shows levels of interest among respondents (by role) in seeing more of various types of spaces used for live music presentation, on a five point scale, where 1 indicates the least and 5 indicates the most important. Dots show average values, meaning that for example a value over 4 indicates that the average respondent found that aspect of live music to be very important. The whiskers around the dots show 90% confidence intervals. Options have been condensed to save space; for example "Publicly owned DIY/non-traditional spaces" was expanded upon in the survey, "(e.g. community centres, libraries, museums)." For the full list of survey questions, please see Appendix III, page 90.*

VIEWS ABOUT EMERGING OR ALTERNATIVE VENUE SPACES, MODELS, AND FEATURES

A key goal of our survey was to go beyond recounting the challenges of the present toward imagining new possibilities for the future. To this end, we asked respondents about their feelings regarding possible new spaces for live music performances, new venue models, and features of venues. Overall, **we find considerable appetite for experimentation**

Toronto Transit: Photo: booledozer

BEYOND THE BOXES: BARRIERS TO ACCESS

Respondents shared less write-in commentary regarding barriers and challenges than in other questions. Notably, 65% of comments came from audience members.

1. **Cost**
   Cost was mentioned as a barrier by the largest number of people, across all roles (about 15% of commenters, 1.5% of respondents). Operators worried about "rising talent costs" and operational expenses, artists/presenters expressed concern about "audience cost barriers" — indicating the impact of the affordability crisis on perceived attendance potential — while audience members viewed ticket prices as too high.

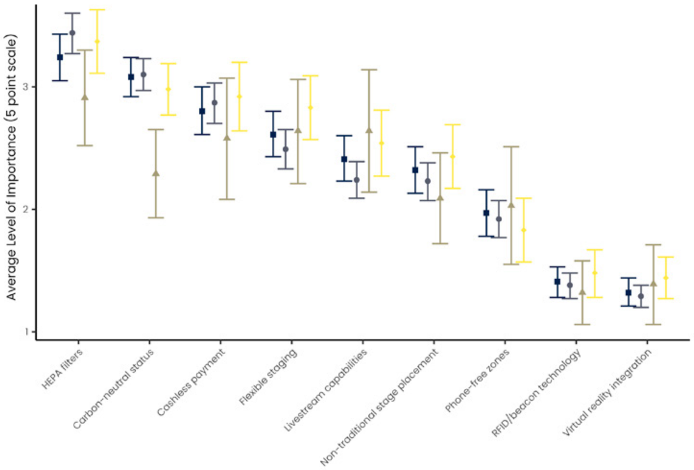
2. **Availability**
   Availability of venues was also a highly ranked concern (about 15% of commenters, 1.5% of respondents), with audience members particularly perceiving them as scarce or endangered. "Disappearing venues for underground music," wrote one attendee. "Remaining venues are very genre-specific, not diverse enough."

Transportation
Transportation was a challenge specifically for audience members, who mentioned the need to travel large distances to attend their nearest venues, or between cities to see specific acts (about 15% of commenters, 1% of respondents).

3. **Poor Sound**
   Poor sound in venues was cited as an ongoing issue by both artists and audience members (about 10% of commenters, 1% of respondents).

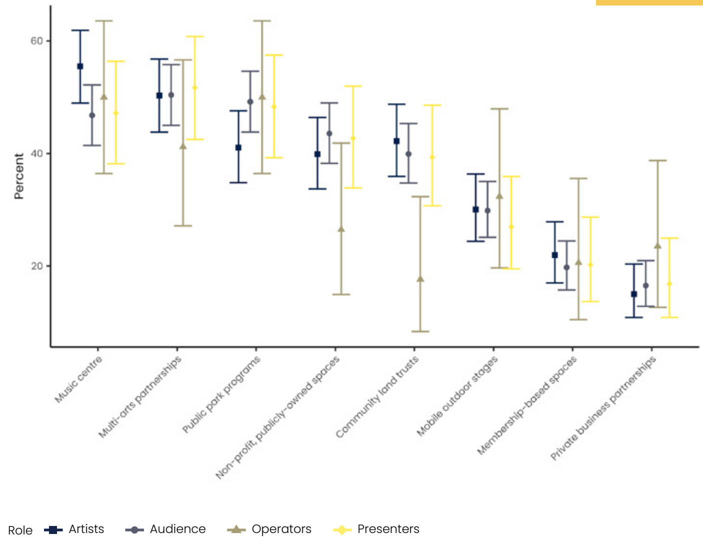
4. **Substandard Bathrooms**
   Substandard bathrooms were mentioned as a detraction to the enjoyment of concerts by a few audience members (about 5% of commenters, <1% of respondents).

How important is it to you that a venue has...? *Figure 21*



Note: This figure shows importance to respondents (by role) of various features of venues, on a five-point scale, where 1 indicates the least and 5 indicates the most important. Dots show average values, meaning that for example a value over 4 indicates that the average respondent found that aspect of live music to be very important. The whiskers around the dots show 90% confidence intervals. Options have been condensed to save space; for example "HEPA filters" was expanded upon in the survey to include "Air purification systems/HEPA filters." For the full list of survey questions, please see *Appendix III page 90*.

Top three Alternative Venue Models *Figure 22*



Note: this figure shows the alternative venue models of highest interest across roles, based upon respondents' top three choices from a list (with an option to write in others). Dots show the percentage that show each option. The whiskers around the dots show 90% confidence intervals. Options have been condensed to save space; for example "Music centre" was presented in the survey as "Music centre (e.g. a venue as part of a music-focused building including rehearsal spaces, recording studios, workshop space, bar/restaurant, etc.)." For the full list of survey questions, please see *Appendix III page 90*.

with new spaces and models, but much hesitancy about incorporating digital and virtual technologies into the live music experience.

Artists, presenters, and audiences want music in new spaces. Entrepreneurship is needed. Across all roles other than owner/operators, we found a strong desire to see live music happen more in contexts outside of its traditional spaces. Public and private DIY spaces received nearly unanimous enthusiasm, while support for public and private outdoor spaces was also very strong. Owner/operators, however, were more skeptical about such spaces. While it is understandable that incumbents are not supportive of competition, it does suggest the need for entrepreneurship from emergent players to experiment with presenting music in non-traditional spaces.

As far as innovations inside venues, there was more agreement across roles. High-tech venue features (e.g., virtual, augmented or extended reality [VR/AR/XR] integration, RFID/beacon technology) were not of high interest to respondents. **VR/AR/XR was deemed "not at all important" by a resounding 79% of survey respondents.** Few respondents expressed strong interest in making venues phone-free, nor was there consistent support for livestreaming or cashless operations.

Owner/operators were most skeptical of pursuing green/carbon-neutral status for their venues, and this goal did not receive strong support from other roles either (averaging 3 on a 5-point scale). One venue feature that did receive significant support was air-purification systems and HEPA filters, which were rated as "very or extremely important" by 46% of respondents. Of the various participant roles, audience members were most likely to prioritize improved ventilation in buildings. While these responses are certainly connected to concerns about COVID remaining high at the time of the survey, they also suggest investments in air quality could improve the audience experience and constitute a competitive advantage for venues that can provide them.

Overall, it seems participants enjoy the traditional venue experience; they just want more of it, at a more reasonable price, and in a healthy and clean environment.

To probe appetite for possible venue models that could deliver the traditional live music experience in new modes, we asked respondents to rank the **top three new models** that interested them the most.

The overall picture that emerges is one of widespread openness to experimentation in this arena. About 50% ranked Music Centres, Multi-Arts Partnerships, or Public Parks in their top 3. Publicly-owned non-profits and land trusts received strong support (about 40% in top 3) from audiences, musicians, and presenters. However, owner/operators again showed more skepticism about these models. Mobile outdoor stages were ranked in the top 3 by about 30% of respondents. The central message of these results is not necessarily that any one of these models is the best, but that in contrast to technological fixes, **respondents seem willing to consider many novel ways of delivering the live music experience.** We therefore explored in more detail a range of these models, with a view toward evaluating their potential as workable models in Ontario.

BEYOND THE BOXES: NEW MODELS

Write-in commentary regarding new and alternative venue models expands upon and reinforces our survey findings: the Ontario music ecosystem is looking for innovation, but is not interested in techno-utopian solutions to the sector's challenges. In many ways, what is needed is a "remixing" of familiar elements, such as hearing music outdoors, offering all-ages shows, and increasing affordability and accessibility. The top five topics that emerged from discussions in the comments are:

1. **New ideas need old buildings (and empty lots)**
Inspired by cities like Berlin, 40% of commenters (about 9% of respondents) were also eager to see and hear music happen in vacant, abandoned or simply underutilized spaces — both indoor and outdoor — such as warehouses, churches, storefronts, parks, parking lots, stairwells, rooftops, beaches or power plants. And some just wanted to experience a different atmosphere from the usual concert experience: "I'd like to see more small-space venues that weren't just the grungy upstairs or basement of a bar. Something clean and bright would be so refreshing!"

2. **Accessible, safe, inclusive, all-ages spaces**
Over 10% of commenters (about 3% of respondents) again stressed the importance of accessibility in creating new venue models, including making venues open to all-ages shows and considering questions such as better sightlines for shorter people: "Venues where accessibility is a priority, not an afterthought."

3. **Multi-functional, multi-purpose**
Others (about 10% of commenters, 2% of respondents) wanted to see venues used for multiple functions, such as doubling as rehearsal spaces for bands, or incorporating more multidisciplinary programming, e.g., theatre, performance art or community arts.

4. **Good sound a must**
Demanding more venues with "excellent sound system(s) and skilled soundpeople" was a common thread in several responses (approximately 10% of commenters, 2% of respondents), a topic that inspired some passionate responses. For instance: "If building a venue for people to attend concerts is important, then the sound should be excellent, not an afterthought. Too many clubs have inadequate setups, broken equipment, poor dynamics, bad room design, inadequate or unskilled staff."

5. **Don't lose the booze**
In spite of concerns about the reliance on alcohol, a handful (5% of commenters, about 1% of respondents) wished to see Ontario liberalize its liquor laws and reduce costs to make it easier to access drink sales as a revenue stream. Others wished to see events go later or overnight, e.g., "We need legal after-hours spaces like every other world-class city."


Axis Club, Toronto. Photo: SimonP.

THE ACCESSIBILITY CHALLENGE

Though less than 10% of artists or presenters identified the lack of accessible spaces as a challenge for *themselves directly*, write-in commentary indicates accessibility remains a high priority, with nearly half of commenters mentioning it as one of their most valued elements of live music venues. This indicates a high degree of empathy and concern for others within the Ontario music community.

Many Ontario cities have challenges in that their supply of buildings is aging, thus making concert spaces located on main floors a rarity — downtown Guelph in particular is notorious for its predominance of second-floor clubs that require egress up and down a flight of stairs[11]. It is often a costly, multi-million dollar obstacle for arts facilities located in old buildings to make the necessary upgrades to become AODA compliant, such as installing accessibility elevators or ramps. There may be the opportunity for more purpose-built design of new music venues, but since most arts groups are financially constrained by the affordability of existing building stock, often it is simply a matter of luck when it comes to finding a performance space that is viable at ground level. Even then, in cities like Toronto, bar or restaurant washrooms are likely to be located down a flight of stairs, in the basement. Yet making bathrooms all-gender and inclusive for trans people is a low-cost way for venues in older buildings to improve their accessibility, as often it is only a matter of updating signage.

11 Beedham, Tom. "Kazoo! Fest makes its 'long-overdue goodbye' by doing what it's always done." *Exclaim!*. July 18, 2022. Available online: https://exclaim.ca/music/article/kazoofest_2022_review_interview


Pancake breakfast @ Kazoo! Fest, Guelph. Photo: Sean McCabe and Nicolette Hoang

MUSIC IS FOR ALL AGES?

A small but vocal minority of respondents identified the scarcity of all-ages concerts as a challenge to the ecosystem. Though it could encompass the entire age spectrum, “All Ages” is traditionally aimed at youth: those under the legal drinking age (in Ontario, 19). As with physical accessibility, there are systemic challenges to all-ages events becoming commonplace. The majority of small venues are licensed clubs or bars that depend on alcohol sales to stay in business. Serving alcohol to a minor is a serious infraction that can result in fines or the suspension or revocation of a liquor license[12]. As a result, many small venues are wary of risking their licenses by allowing underaged people on their premises. As a result, youth are often excluded from participation in grassroots local music scenes.

Economic alternatives to the dominant bar model do not come easily. Without food and drink sales, venues’ revenue options are limited: they may be forced to charge additional facility fees to users who wish to present all-ages concerts, which negatively impacts artist fees and/or results in higher ticket prices for concert-goers. The value of all-ages concerts to music ecosystems is worthy of further consideration and study. Ontario’s heyday for indie music in the 2000s, characterized by the rise of bands like Broken Social Scene and F***ed Up, was arguably incubated in the ’90s, when all-ages shows were commonplace. When Toronto’s main all-ages club, the Big Bop, closed in 2010, it cut off a key pipeline for youth performances, resulting in a comparative deficit of young bands in following years.

12 Government of Ontario. Ontario Liquor License and Control Act. 2019. Available online: https://www.ontario.ca/laws/statute/19l15b

THE NEED FOR SAFER SPACES

In the space provided for additional commentary, some respondents emphasized the need for safety within an IDEA (Inclusion, Diversity, Equity and Accessibility) framework. It remains a challenge to ensure that music venues are “safer spaces,” in particular with regard to sexual assault, harassment, discrimination, and gender-based violence. Though many venues and presenters do regularly post codes of conduct and anti-harassment/violence policies, enforcement remains at the discretion of the venue and its staff or hired security personnel.

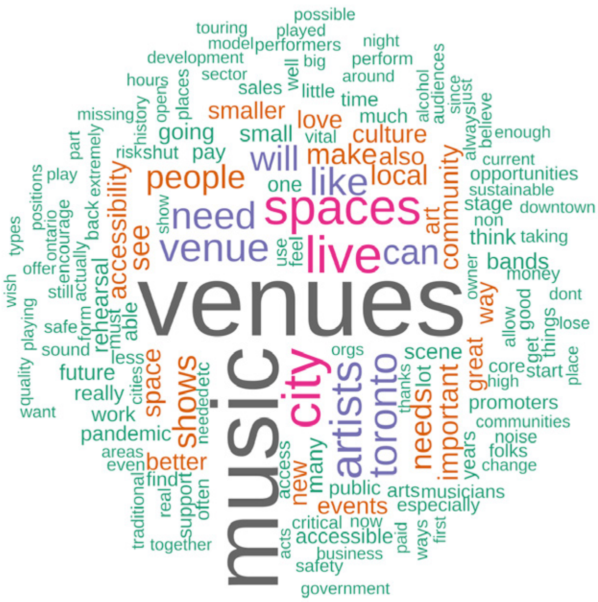
Grassroots venues and art spaces in the Toronto area benefited from the affordable training provided by the Dandelion Initiative’s Now Serving: Safer Bars & Spaces, a program “created in response to the normalized patterns of sexism, harassment, and violence experienced by women and trans people in hospitality and creative arts spaces[13].” Now that the program has been discontinued, it is unclear what will fill its void. Presenters who receive arts council funding are usually required to sign or provide respectful workplace policies[14].

In the wake of the #MeToo movement’s formation in 2017–18, industry stakeholders established the Canadian Creative Industries Code of Conduct while the Canadian Arts Coalition (CAC) and the Cultural Human Resources Council launched the Respectful Workplaces in the Arts campaign. Presenters and companies could publicly sign their commitment to both codes. Many grassroots venues do not receive public funding and are often “out of the loop” when it comes to receiving such sectoral information or initiatives. It thus remains an ongoing challenge to normalize music venues as safer spaces.

13 Safer Spaces Training. Dandelion Initiative. 2022. Available online: https://dandelioninitiative.ca/safer-spaces-training

14 Terms and conditions — receipt of OAC operating grant funds. Ontario Arts Council. 2023. Available online: https://www.arts.on.ca/grants/general-granting-information/guide-to-operating-programs/terms-and-conditions-receipt-of-oac-operating-grants

BEYOND THE BOXES: ADDITIONAL COMMENTS



Survey respondents were given the opportunity to close out the survey by providing additional thoughts on their experiences in live music venues and their future. These were the major themes emerging from this wrap-up commentary:

1. **Venues must be accessible, safe and inclusive**
   33% of commenters (about 14% of respondents) again stressed the importance of keeping IDEA (inclusivity, diversity, equity and accessibility) in mind.

   - *"Accessibility should be the number one priority; for all ages and abilities."*

   - *"I wish I felt safer going to shows at night alone. Or there was a way to pair up with other women going alone."*

   - *"Live music spaces, especially in the now traditional spaces such as bars, are still gatekept by cis white males. This lack of diversity in leadership tends to overlook initiatives to 'do better.'"*

2. **Fears for the future**
   Across roles, 15% of commenters (about 7% of respondents) expressed worries about the many existential threats to live music venues, such as increasing costs of rent and insurance, noise bylaws, and NIMBYism, and frustration with perceived political inaction.

   - *"I am very sad about how Toronto loves to erase its history and doesn't value what it has. I also believe City Hall wastes copious amounts of time and money 'consulting' and 'planning' and 'envisioning the future', and that independent artists actually have very little to show for this."*

GREENING THE SCENE?

"I would like to see more green venues, but it is not top of mind when thinking about the live music scene, to be honest. I hadn't considered it to be a factor before this point."
— Survey respondent

The question of ecological sustainability was not ranked as a high priority by survey respondents, despite the recognition of music venues' deficiencies in this area (less than 10% viewed venues as sufficiently green). Considering the enormity of the challenge of climate change, it is still worth discussing. Since the pandemic, most live music venues and presenters are still operating in "survival mode," more preoccupied with keeping their businesses running from day to day than planning for the expensive, time-consuming and long-term investments required to go carbon neutral or carbon negative.

Organizations such as non-profit Music Declares Emergency — founded in the UK in 2019, with the Canadian chapter[15] established in 2021 — are currently working to bridge the gap between talk and action within the domestic music industry and get the sector more fully engaged with climate issues, through educational efforts such as the Music Climate Summit.

UK non-profit Julie's Bicycle reported in 2007[16] that audience travel — the movement of concert-goers to and from venues and festivals — is actually the largest carbon emitter in the UK music industry, making up 43% of all emissions. Emissions from venues were the sector's third-largest emitter, and have since likely moved into second place following the collapse of the physical recorded music market. More up-to-date data in a North American context is required, but these studies indicate the importance of public transit and human-powered transit to venues — as well as the potential for creative interventions such as the Stage Truck to bring live music closer to audiences that live outside city centres.

15 Disclosure: Study co-author Jonathan Bunce is also a founding Board member of Music Declares Emergency (MDE) Canada.

16 Bottrill, Catherine, Lye, Geoff, Boykoff, Max, & Liverman, Diana. *First Step: UK Music Industry Greenhouse Gas Emissions for 2007.* Julie's Bicycle. 2007. Available online: https://juliesbicycle.com/wp-content/uploads/2022/01/Summary_First_Step_UK_Music_GHG_Report_2008-1.pdf

3. **Venues create community — through mixed uses**
This was shared by 11% of commenters, 7% of respondents.

    - *"Multi-use venues are my favourite: ones that can program music of all kinds, performance art, comedy, theatre, and community/youth clubs."*

    - *"Music and art are only tools for us to gather and connect with each other. How can we use this opportunity to give back to the space, environment and community?"*

4. **Small + local is beautiful**
This was shared by 10% of commenters, 6% of respondents.

    - *"We need small spaces, mid-sized spaces, and big spaces. Toronto feels very dominated by big and mid-sized spaces at the moment. Smaller venues for emerging acts are severely lacking."*

    - *"A lot of people don't realize that smaller venues with local talent can be as entertaining, if not more entertaining, than seeing a superstar in a stadium."*

5. **Pay the artist**
This was shared by 7% of commenters, 4% of respondents.

    - *"Artists and presenters need to be paid. If a performer is good enough to grace your venue, then they are good enough to be paid without having to rely on 'pass the hat' economics."*

6. **Love and cautious optimism**
This was shared by 7% of commenters, 4% of respondents.

    - *"I am hopeful for this city but it needs concerted effort or we will lose this rich history and culture that exists, not just in the people but in the places. These spaces have stories to tell. We need to preserve them as well as find new spaces to tell the stories of all that live here."*

Cots @ Kazoo! Fest, Royal City Mission, Guelph. Photo: Sean McCabe and Nicolette Hoang

NEW VENUE MODELS

CASE STUDIES

Our survey, echoing sentiments found in other recent studies, suggests there is a desire for new venue models that combine conservation and innovation. On the side of conservation, there is widespread recognition that existing venues anchor musical ecosystems and local economies, nurture talent, store memories, draw visitors, and contribute to cultural and social innovation. The venue experience itself involves a package of features that have evolved in ways that audiences and musicians value. The conservation challenge is to creatively preserve these valuable features in changing circumstances; the innovation challenge is to incrementally improve them while making them accessible to more individuals and communities — and ensure their long-term sustainability.

This section considers in more depth five possible new venue models that have the potential to meet these challenges in different ways. These five models speak to three dimensions of the challenges the live music sector in Ontario faces:

1. **Increasing the availability of live music outside of its traditional spaces and areas** (The Stage Truck; Everywhere's a Venue)

2. **Offering affordable spaces for innovation and community-building** (Multidisciplinary Arts Centres; Music Centres)

3. **Protecting music venues from rapid rent and real estate market changes** (Cultural Land Trusts)

These five models are not the only ones that could play a role in responding to the challenges of the live music ecosystem in Ontario. Still, they have been raised enough times in our research — and that of many others — that warrant a deeper look into how they might function. Our goal is not necessarily to advocate for any one of these, but to present them as part of a suite of options to consider in collective efforts to reimagine Ontario's music venues. This section mostly presents case studies that illustrate successful examples of these models, though we also try to extract key elements from these cases that can help to identify the core components of more general models that could be adapted elsewhere.

We stress that these are new venue *models*. The question about how to fund and implement them from a policy or business point of view is a different one, though we do touch on aspects of funding models where relevant. However, we envision these as models that in many cases could be taken up by many types of actors, whether for-profit, non-profit, or government agencies. There is no one right answer as to who or how, and in a complex ecosystem, the same model may be pursued in different ways in different contexts. We review possible avenues for supporting such endeavors in the next section.

INCREASING THE AVAILABILITY OF LIVE MUSIC OUTSIDE OF ITS TRADITIONAL SPACES AND AREAS

THE STAGE TRUCK

The Stage Truck is, essentially, *a food truck for live music*. The idea of a mobile stage is not a new one, but nonetheless it is an intriguing, mostly unexplored concept. A common refrain in our survey was that many neighbourhoods, especially in Toronto and Hamilton, are underserved by live music.

Many pointed to parks, as well as spaces such as parking lots or vacant lots, as offering great potential for live music. Toronto's music and cultural policy community has been especially interested in exploring ways to deliver live music to neighbourhoods and communities outside the downtown core. Toronto's 2022 Music Industry Strategy recognizes that "space for music outside the downtown core will create more opportunities for artists and industry to develop in diverse communities while reducing barriers to access[17]."

The potential is there, as Toronto has a relatively high amount of parks and other open spaces. Yet live music is rarely heard in the city's parks, outside of a few approved locations. Considering its size, Toronto also has a very small number of dedicated outdoor stages with permanent performance infrastructure (e.g., sound and lighting). These are mostly controlled by large companies such as Live Nation (e.g., Budweiser Stage, RBC Echo Beach) and located downtown. There is no equivalent to a non-profit, professional stage such as New York City's SummerStage in Central Park — though the Dream in High Park did include an outdoor concert series in its 2022 season, featuring the likes of Jully Black, Dan Mangan, and Ron Sexsmith.

Given the rental and labour expenses of bringing in and building staging, equipment, fencing, toilets, and other amenities, the financial risks of producing outdoor events for smaller, community-based or independent promoters/presenters are very high. Combined with increasingly unpredictable weather and climate events, festivals in Ontario have become a risky prospect, both financially and safety-wise. Witness the storm-driven emergency evacuation at the 2022 Boots and Hearts Festival in Burl's Creek[18], the 2015–17 boom-and-bust of major new festivals WayHome and Bestival, and a promoter such as Collective Concerts' Jeff Cohen candidly admitting their event TURF (Toronto Urban Roots Festival) "lost hundreds of thousands of dollars[19]."

Likewise, permanent venues outside the downtown core is a risky proposition, financially. There is a reason that music and entertainment tends to cluster in central areas: they are at the heart of transit networks and can be reached by more people from more parts of the broader region; the potential audience goes well beyond the local residential community. Neighbourhood venues therefore tend to serve smaller audiences, and often are combined with restaurants and bars to cover their costs.

This does not mean that such communities do not want or value live music; far from it. It does mean, however, that the traditional model of a brick-and-mortar structure in a fixed location may not be the only or best way to deliver live music

17 Nordicity and City of Toronto Music Office. *Music Industry Strategy: 2022 - 2026*. 2022. Pg. 29. Available online: https://www.toronto.ca/wp-content/uploads/2022/07/8e4e-Toronto-Music-Industry-Strategy-2022-2026.pdf

18 OrilliaMatters Staff. "UPDATE: Shania Twain show at Boots and Hearts will go on." *Barrie Today*. August 7, 2022. Available online

19 Rayner, Ben. "Toronto's music-festival feast is over." *Toronto Star*. May 16, 2017. Available online: https://www.thestar.com/entertainment/music/2017/05/16/torontos-music-festival-feast-is-over.html

everywhere. Food trucks, for example, have brought wide-ranging innovative and traditional culinary options to diverse parts of many cities. They have also been a launching pad for new restaurateurs to hone their craft in a relatively low-stakes way, and a vehicle for entrepreneurs to learn about the market potential in neighbourhoods and communities before opening up a traditional restaurant there.

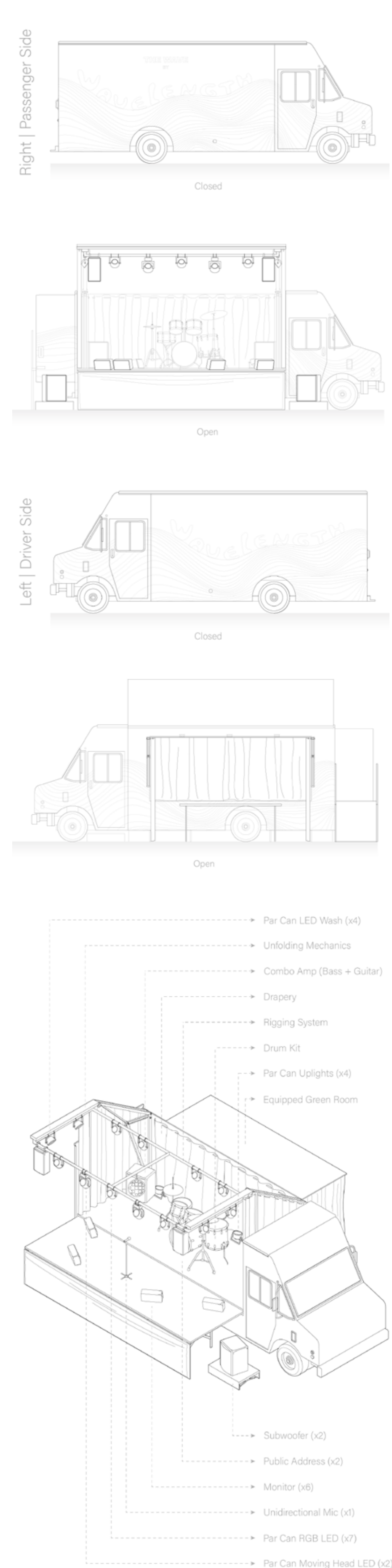
The Stage Truck is an experiment in bringing lessons from the food truck to the domain of music. Toronto's recent music policy studies have recommended the City's cultural and heritage sites and museums hosting more musical events. A Stage Truck could make this easier and more cost-effective. Likewise, parks and other spaces in neighbourhoods that might not be able to currently support a permanent venue could host temporary events. New and emerging musicians and promoters could hone their crafts, while also building audiences.

The Stage Truck's mobility would open up live music to parts of the city, particularly Toronto's inner suburbs such as Scarborough, Etobicoke and North York, which are underserved in terms of performance venues yet possess ample parkland. The Stage Truck could act as a small-scale intervention, animating parks and other public spaces outside the city's downtown core with performances by local artists. Toronto Arts Council already runs a funding program, Animating Toronto Parks, supporting multidisciplinary arts events in green space in the inner suburbs, which the Stage Truck could help enhance.

The idea behind the Stage Truck is therefore to propose building a technologically self-sufficient outdoor stage on wheels that would be low-cost and low-risk for grassroots and community groups to rent for festivals and events. Not just meant for use in parks, the Stage Truck could pop up in parking lots or street closures for community festivals. This "all-inclusive" solution would save DIY presenters on the time and costs of sourcing equipment and materials from multiple providers, while also allowing organizations with grant funding to devote more budget to paying artists.

To put these general ideas to the test, we engaged a group of talented University of Toronto students to conduct a feasibility study, as part of the School of Cities MUCP (Multidisciplinary Urban Capstone Project) program. In the words of the students, "A theme around 'adaptations in music venues in response to COVID-19' was determined to establish a lens of futurity and potential for timely, positive change." Though the feasibility study was Toronto-specific, Stage Trucks could be deployed in other Ontario communities, many of which also face disparities in urban form.

The full study is available here: wavelengthmusic.ca/reimaginingmusicvenues. The proposed Stage Truck is a converted Chevrolet P30 step van — the type of small truck typically used as a food truck — which folds open to offer a fully equipped stage, including sound, lighting, backline and a generator, which can be set up anywhere it can be safely parked. The feasibility study (appended to this report) includes a universal equity framework, administrative toolkit, business case and design renders. Though the proposed truck is a diesel vehicle (to reduce estimated costs), an electric, hybrid or other green vehicle would also ensure long-term sustainability. The potential proprietor of the Stage Truck could be a municipality, a provincial agency, a non-profit or charitable organization, or a social enterprise.



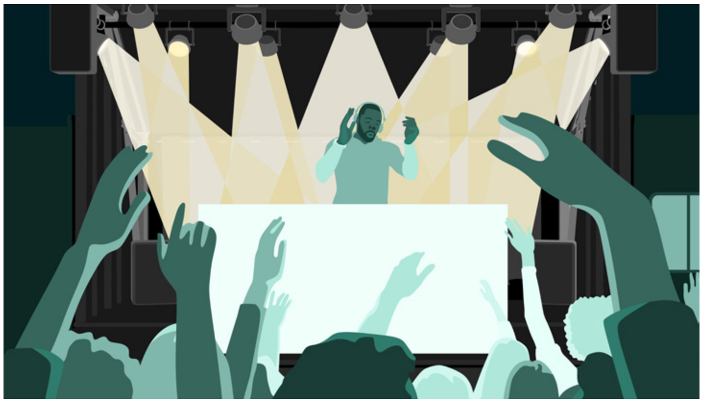
STAGE TRUCK DESIGN PROCESS:

1. The Stage Truck was "built" with a design matrix using the following criteria: operational excellence, DIY/non-profit friendly, capacity, long-term impact, accessibility, environmental sustainability, and innovation.

2. Stakeholders including promoters/presenters, venue owner/operators, musicians, and staff took part in a design review panel which affirmed the "proof of concept."

3. Comparative analysis with existing services/builds such as the Stageline SL series of hydraulic stages affirmed significant competitive advantage to existing outdoor staging options, while also acting as a flexible "production enhancement tool" for grassroots presenters.

4. A detailed business case and cost projections determined the Stage Truck could be built with an estimated upfront investment of **$200,000**, plus annual operating costs of **$36,500-$43,500** (range adjusted for inflation in 2023). The break-even per-use cost would be two-thirds the current market cost of comparable outdoor staging rentals in Toronto.



EVERYWHERE'S A VENUE

The Stage Truck, if actualized, may serve as a production enhancement tool to help free live music from its geographical confines. Performances can happen anywhere. In the words of one respondent, "Parks, backyards, parking lots, laneways, construction sites, highrise rooftops, fields, [and] beaches." Live music in the public realm provides an alternative to the licensed bar environment, and is likely to present the opportunity for more diverse, multigenerational audiences to enjoy performances together. In our survey, as in previous studies, there was much enthusiasm for exploring opportunities to present live music in underutilized public and private spaces.

However, once the topic turns from aspiration to implementation, a number of questions arise. How can live music be presented in public space professionally and legally, in front of an audience, with permits in hand, and with mechanisms for artists to be paid? And where?

Outdoor concerts are weather-dependent and, in the cold climate of Ontario, are limited to a short presentation of four to six months, usually from late May to early October. Indoor locations — churches, galleries, libraries, laundromats, stores, warehouses, shopping malls, office building lobbies, and anywhere else you can imagine — are also at once promising and challenging. The most significant challenges are cost-related, but there are also issues related to access, regulatory opacity and building safety or capacity concerns[21]. DIY presenters and artists can sometimes operate in a regulatory "grey area" where, for example, it is unclear if a building is zoned or approved for assembly occupancy. Indoor DIY events may also pose a range of barriers to physical accessibility, not just in terms of egress but also the condition and accessibility of washroom facilities.

All things considered, the concept of Everywhere's a Venue is so wide-ranging that it may seem to provoke more questions than answers. Therefore, rather than a detailed analysis of the challenges around producing indoor DIY events, we will mostly focus on outdoor live music.

21 As Neena Sethi wrote in the City of Toronto's 2018 study of the sub-sector, "DIY venues require self-sufficiency from event organizers: from bringing in sound equipment, to marketing, promoting and selling tickets, to securing talent, getting the appropriate one-time alcohol permit and arranging for security in addition to securing the venue itself." Sethi, Neena. *DIY Events in Toronto: Understanding Challenges to Access and Space*. August 2018. Available online: https://www.toronto.ca/legdocs/mmis/2019/ec/bgrd/backgroundfile-134956.pdf

THE STAGE TRUCK

INTERNATIONAL EXAMPLE:
OMAHA MOBILE STAGE. OMAHA, NE (USA)

After the MUCP study was completed in spring 2022, another mobile stage made its debut in the mid-sized, Midwestern US city of Omaha, Nebraska. Operated/programmed by Partners for Livable Omaha, a recently established 501(c)(3) non-profit organization dedicated to the educational and charitable support of the live performing arts, the Mobile Stage is its flagship project — one with an explicitly philanthropic mission and aims to use live arts and music to enhance quality of life.

The OMS is a repurposed 18-foot box truck built by architecture students at the University of Nebraska's FACTLab, with a similar concept as the MUCP Stage Truck: it is meant to support creative placemaking, and to be agile, fully serviced with sound/lighting, and affordable and accessible to the community. The project received $60,000 USD of in-kind contributions from its architecture, engineering, electrical, and university partners during the design/build team. An additional $75,000 USD was raised for the initial purchase and transformation of the truck[20].

Partners for Livable Omaha decided to focus their first year of programming on co-producing events in "historically disadvantaged communities" such as North 24th Street, considered the cultural heart of the city's Black community. The Mobile Stage was used for approximately a dozen events in its inaugural season, including blues and folk concerts, a hip-hop dance fest, a skateboarding fest, and several open-mic and youth talent shows. The mobile stage offers non-profit and sliding scale rentals, as well as a paid internship training program for aspiring technicians and arts workers.

20 Scheuerman, Jessica, & Kuhlman, Kaylea. "How mobile placemaking in Omaha, Nebraska is supporting the city's Black commercial corridors." Brookings. October 31, 2022. Available online: https://www.brookings.edu/blog/the-avenue/2022/10/31/how-mobile-placemaking-in-omaha-nebraska-is-supporting-the-citys-black-commercial-corridors/

Jared Both / Secret Hymns @ Fort Elgin's Music Raft, Bayfront Park, Hamilton. Photo: Matt Thompson

Neighbourhood concert series [deluxe edition].
Many municipalities across Ontario have provided funding or partnered with local BIAs or other neighbourhood organizations to present free outdoor summer concert series. These events consist of paid performance opportunities, often for local artists, programmed through an open-call application process, with production and marketing covered by the city, BIA, or neighbourhood organization (such as a "Friends of..." group).

This is a tried-and-true model. The main challenges involve frequency, scale, and organization. BIAs and neighbourhood groups are not often in a position to organize and produce concert series in more than one park in their catchment areas, leaving many others underutilized. Communities without BIAs or well-funded and organized neighbourhood groups can also be left out. Moreover, local groups generally lack expertise in artistic curation, leading to uneven quality.

Reviewing various attempts to mitigate these problems, we can identify models that could generate an expanded form of the traditional neighbourhood concert series.

1. **Cross-Community Coalition**
   BIAs can partner to pool resources and share costs. Such a coalition can:

   - Purchase PA equipment and flexible stages (such as small tents or sun coverings), which can be reserved or rented by members.

Ten Kills the Pack @ The Brockton, Toronto. Photo: Sara Hines

Sofar Sounds and **Side Door** are two international platforms that illustrate the promise of making "everywhere a venue." Sofar Sounds is a UK startup now located in 400 cities. It "transforms everyday spaces — like a rooftop or art gallery — into captivating, intimate venues for secret, live music performances." Vancouver start-up Side Door (co-founded by musician Dan Mangan) uses an online, AirBnB-style platform to connect artists with hosts who wish to present concerts in their own (quite often literal) backyard. With a decentralized business model that allows for paid, ticketed concerts in private or unusual spaces, Side Door successfully pitched CBC TV show *Dragons' Den*, with $500,000 in financing offered by Arlene Dickinson.

- Hire professional curators to program events, to maximize quality, originality and diversity.

- Survey the entire suite of offerings in order to identify gaps and opportunities, both in time and space. Some locations are best animated on a Sunday afternoon, others on a Wednesday early evening, or late on a Friday.

- Promote musical community building and professional development. Performers can receive automatic membership in city-wide coalitions and be listed in directories that other localities can draw on. This can connect performers to both local community groups and broader city-wide networks so that organizers learn about musicians and musicians learn about opportunities.

2. **Independent Non-Profit**
   Form an independent non-profit to deliver live music both at centrally accessible locations and in local parks city-wide. Some components of this model include:

   - **Public-private partnership**. Such an organization can partner with city governments to secure a long-term lease of space for the summer in exchange for presenting free programs that the organization raises funds to produce. In Toronto, parks such as Humber Bay Park, Trillium Park, Garrison Common, or Riverdale Park could work for this purpose.

   - **Use ticketing to pay for free shows**. A few high-profile ticketed or benefit shows, as well as renting out a successful stage to outside promoters and sponsorship, can generate enough revenue to pay for many more shows to be provided for free.

   - **Centre and periphery.** A non-profit that generates enough funds through a popular central city location can use those funds and its own organizational infrastructure to support live music throughout the rest of the city.

   - **Fundraising and membership.** A non-profit can constitute itself as a charity to receive donations to support its mission to bring free live music to as many residents as possible. It can also offer memberships and host gala events.

3. **Space-Granting Strategy**
   A more proactive model in which community stakeholders and staff work to create grants that allow performers to apply to rent underused and unconventional city-owned spaces at low to no cost, as proposed by Matt Thompson of Hamilton.

EVERYWHERE'S A VENUE

PROVINCIAL EXAMPLE: CITY SOUNDS. OTTAWA, ON

Jakean @ City Sounds, Ogilvie Square, Ottawa. Photo: Quest.

One of the most effective of Ontario's free, paid-performance summer concert series is City Sounds, presented by the Ottawa Music Industry Coalition (OMIC), in partnership with various Ottawa-area BIAs. In 2022, the series presented 35 concerts featuring 75 artists, to whom they collectively paid $42,000 in artist fees[23]. A diverse lineup including EDM, folk, hip-hop, jazz and Indigenous artists performed at a range of locations, from famous downtown sites like the Byward Market and the National Gallery to urban neighbourhoods including Westboro and the Glebe, suburbs such as Barrhaven and Orléans, and rural areas such as Manotick. Embracing a DIY philosophy, there was no stage set-up — artists performed under a small 10'x10' tent or sun covering, with a basic PA supplied by the series.

The City Sounds concerts also took place at various different times of day. OMIC executive director Melanie Brulée said, "It can be a Sunday afternoon, it can be an evening because it's summer. There's no rules. We're working really closely with the BIAs and what works for them. So if they think that filling up this square on a Sunday afternoon works, then that's what we do." Additionally, the program has professional development benefits for participants, as all artists accepted to perform at City Sounds in 2022 received a free OMIC membership.[24]

23 "City sounds: Sons de la ville." Ottawa Music Industry Coalition | Coalition de l'industrie de la musique d'Ottawa. Retrieved 2023. Available online

24 "Membership: Adhésion." Ottawa Music Industry Coalition | Coalition de l'industrie de la musique d'Ottawa. Retrieved 2023. Available online

- Many cities in Ontario are well-suited for this kind of initiative, in that they have ample available municipal cultural infrastructure but lack organization to mount a co-ordinated response to the ongoing loss of cultural and performance spaces.

- A Space-Granting Strategy serves the purpose of creating a low-cost method of engaging underused spaces in the city while increasing opportunities for small or DIY performers to draw audiences to unique lower-barrier spaces. The call for applicants could be done through current city grant processes.

- The use of underused and unique city-owned spaces provides an opportunity for performers to engage new audiences while at the same time providing spaces to be seen in ways that are unexpected. This could work by involving the City or arms-length non-profits such as local arts councils during the application, coordination and awarding of Space Grants through four phases:

    1. A pilot project in which stakeholders identify city-owned spaces that may be of potential interest to performers, including both spaces that are currently available for rent and also spaces that are of interest but not currently available to rent.
    2. A call to performers to apply to use these spaces via the Space Grants.
    3. The events themselves, including city support.
    4. The collection of performer and staff feedback, including program evaluation.

The City of Toronto also runs a program called Community Space Tenancy[22], which leases City-owned or City-managed spaces to eligible non-profits at below-market rates. This program is intended for longer-term occupancy, however, and could be made more nimble and flexible to increase access by more emerging, DIY or grassroots presenters.

22 "Community Space Tenancy." City of Toronto. Retrieved 2023. Available online: https://www.toronto.ca/community-people/get-involved/community/community-space-tenancy/

EVERYWHERE'S A VENUE

INTERNATIONAL EXAMPLE: CITY PARKS FOUNDATION. NEW YORK, NY (USA)

Central Park SummerStage. Photo: Emily Goncalves

SummerStage in Central Park is a must-do for any visit to New York City — especially for live music lovers. Its iconic circular stage looks a bit like a flying saucer has landed in one of the world's most storied urban attractions. And its leafy green surroundings are especially envy-inducing for Torontonians — Ontario's capital lacks an equivalent. Though parks like Downsview, Fort York, and Woodbine often host live music, few have permanent staging infrastructure.

Run by the non-profit City Parks Foundation, SummerStage was established in 1986 by a group of citizens and artists concerned about the state of Manhattan's Central Park. It has since expanded to become NYC's largest free outdoor performing arts festival, presenting concerts in parks in all five boroughs annually from June to October.

When SummerStage was founded, "people did not go into Central Park after dark because it was a very unsafe place," says executive artistic director Erika Elliott. Arts and culture was seen as a way to get New Yorkers to re-engage with the park, and an independent non-profit was established to manage this new activity. "The City Parks Foundation works in conjunction with the Parks Department and has been overseeing the festival ever since. We have a partnership with the City of New York, where we get a long-term lease of the space in exchange for presenting free programs that we raise funds to produce."

2022's impressive slate of shows included jazz, funk, indie, electronic, hip-hop, opera, bhangra, Latin, salsa, and doo wop. The majority of SummerStage shows are free, plus some ticketed or benefit shows, and rentals to outside promoters (the foundation's largest sources of revenue, followed by sponsorship). Financial institution Capital One is a title sponsor. In archetypically American, roll-up-your-sleeves-and-pitch-in spirit, this public asset is mostly supported by private money. Though they do receive some government subsidies, that does not include the City of New York itself: "It's nice that we have a relationship, but we bring a lot to the city and don't get funded by them directly."

OFFERING AFFORDABLE SPACES FOR INNOVATION AND COMMUNITY-BUILDING

Our survey and interview findings reveal significant interest in dedicated yet flexible music-centric performance spaces that can also be used for multidisciplinary presentations and other mixed uses. We consider two models that received strong support in our survey: Multidisciplinary Space Partnerships and Music Centres.

THE VENUE IN THE ARTS CENTRE: MULTIDISCIPLINARY SPACE PARTNERSHIPS

A multidisciplinary space partnership involves a music presenter or venue partnering with arts groups working in other disciplines, e.g., visual art, dance, theatre, spoken word, comedy, film/video, digital/media arts — or even esports. While a number of funding models could support such a partnership, it is well-suited to non-profit arts organizations within the Canadian and Ontarian public funding structure. Such non-profits can gain access to public funding for capital costs in addition to programming, staffing, and marketing subsidies. They can also rent out their spaces for events and other programming to generate funds to support their own efforts. Given the wide array for funding across different arts disciplines and the large number of existing organizations with multidisciplinary mandates, this model indicates the potential for greater economic stability, viability and risk-taking than commercially driven bars and clubs.

EVERYWHERE'S A VENUE

PROVINCIAL PRESENTER PROFILE: FORT ELGIN. HAMILTON, ON

Drone Day concert @ Gage Park Greenhouse, Hamilton. Photo: Matt Thompson.

In the early 2000s, Matt Thompson hosted a radio show on McMaster University's campus station CFMU 93.3 FM. He found it easy to host live on-air performances by the local experimental electronic artists he was drawn to, as they could throw their gear in a backpack, plug directly into the soundboard, and play. A few years later, he began hosting concerts in his living room, starting with Toronto singer/songwriter/producer Sandro Perri. He got the word out via Internet message board Stillepost. This began a long Hamilton tradition of Thompson's house shows.

"I know there's a whole economic development side to creative industries, Richard Florida and all that stuff," says Thompson. "And that's cool. That's for other people. For me it's, 'Where can things resonate with people in a deep, meaningful way? What happens when we have 10, 15, 20 people in a room together?' And that's what's always driven me."

Thompson is a true community builder, passionate about his hometown and connecting his neighbours with deep experiences and each other. Today, he organizes events under the name Fort Elgin, via Instagram, purely as a passion project; he works by day for a social-service charity. Thompson and his wife host concerts at their house three or four times a year. COVID provoked a longstanding desire to present more live music outdoors.

"Music being outside just means it's better for people. You can have shows in the afternoon, shows where it feels different." In August 2020, Thompson and a friend built a small raft and floated it in the harbour, allowing local performers to play on the water for a socially distanced audience on the beach. It was the first time many had played or heard live music in half a year. Through the pandemic, Fort Elgin continued hosting shows on beaches, in backyards, and around campfires, all with the aim of cultivating community. He also began organizing non-musical social events, including making canoes available for neighbours to borrow[25].

Pre-pandemic, the City of Hamilton opened a gorgeous new tropical greenhouse at Gage Park. Fort Elgin wanted to be the first to put on a show there and did so, presenting an ambient music event in 2019. Even though it's technically inside, it's by definition "green space." "A greenhouse is a place that deeply resonates with people. That took a couple of months of wrangling back and forth because they didn't understand what I wanted to do." It was an education in working with the city, but one that left Thompson more hopeful than jaded about municipal partnerships. In fact, it made him scheme up an idea for a Space-Granting Strategy to help subsidize access to public spaces for arts events — at low cost to a municipality. (See page 42.)

25 Rankin, Christine. "Meet Matt Thompson, the spirit of Beasley." CBC News. November 26, 2019. Available online: https://www.cbc.ca/news/canada/hamilton/hero-hammer-matthew-thompson-1.5356179

Charles Spearin @ Wavelength, 918 Bathurst Centre, Toronto. Photo: Green Yang

Despite such an obvious advantage, music-embracing arts centres appear to be more common elsewhere in the world than in Ontario. The few outstanding examples of such successful centres within the province appear to be the exceptions that prove the rule. In addition to Club SAW / Arts Court in Ottawa, it's worth mentioning the Niagara Artists Centre (St. Catharines), Alton Mills Arts Centre (Caledon), and the Forest City Gallery (London) as art spaces with strong music/sound programming. A handful of new multidisciplinary spaces in Toronto aimed at representing the Black community are in the process of opening: Blackhurst Cultural Centre, It's Ok* Studios, the Nia Centre for the Arts, and the Wildseed Centre for Art & Activism[26].

Multidisciplinary space partnerships can potentially take many forms. However, there are two main approaches (many spaces offer both):

1. Arts centres that contain a dedicated live music or performance space alongside other purpose-driven rooms or facilities (e.g., gallery/exhibition, workshop/studio or admin/meeting space).
2. A single room that has the flexibility or modularity to be used for multiple purposes.

Music interfacing with other disciplines poses various opportunities and challenges, depending on the discipline. While multidisciplinary centres are in principle combinations of any and all artistic disciplines, in practice music tends to join more easily with film, video, and comedy than theatre/dance and visual art:

- Film and video groups are more likely to host one-off screenings, making them potentially more compatible with music use by eliminating such scheduling roadblocks, outside of festival runs. The Paradise Theatre in Toronto, for example, was designed with multifunctional staging and A/V to accommodate both concerts and film screenings.

- Comedy and music already made good bedfellows and have long shared nights on the calendar — if not the same bill — at long-running venues like the Rivoli in Toronto.

- Theatre/dance can pose scheduling challenges sharing a single space with music presentation, in spite of the superficial commonalities of being based in performance. Some venues can get creative to work around this, however — for example, Bridgeworks in Hamilton blocked off dates in the summer for the local Fringe Festival, at a time of year when they knew that fewer mid-level musical acts would be touring.

- Visual art is usually non-durational and can in theory inhabit the same space as a music venue, depending on the nature of the work and how it is intended to be viewed. The devil is in the details, however, and many gallery owners or curators are nervous about the prospect of artwork being damaged or disrespected by concert-goers or venue staff. Often, the only times galleries are open to outside event bookings is between exhibitions.

Multi-room arts centres that incorporate music also face another challenge: soundproofing. Music is *loud*, and the sound of pounding drums, subwoofer beats, woodwind warm-ups, and microphone checks can be disruptive to other users, especially those working in disciplines — or other musical genres — that require silence. Minimizing if not eliminating sound bleed is essential for multidisciplinary peacekeeping, especially when scheduling conflicts cannot be avoided. This can be very costly.

Lastly, multi-use or multifunctional spaces can potentially face zoning obstacles, especially if they are located in areas that are not zoned for entertainment use or public assembly. Usage permissions may be based around a primary use — a hypothetical arts centre may have to "decide" if it is an art gallery or a concert venue[27]. The City of Toronto, for example, is currently exploring "alternative solutions" for dual-use or temporary use of properties for live performance purposes under the Ontario Building Code[28].

26 Though Toronto's Artscape may in some ways offer an example of multi-arts centres, the agency evolved into a culturally oriented development company who leases space to qualifying tenants, and their buildings are home to a collection of divergent users who may have little connection with one another. The company going into receivership at press time in August 2023 is an indication that Artscape's real estate-oriented business model faced long-term viability challenges.

27 Tam, Jaclyn. Personal communication.

28 Blackman, Cheryl. *Emerging Entertainment Areas Outside the Downtown Core.* City of Toronto. September 3, 2021. Available online: https://www.toronto.ca/legdocs/mmis/2021/ec/bgrd/backgroundfile-170527.pdf

THE VENUE IN THE ARTS CENTRE

ONTARIO VENUE PROFILE: ARTS COURT / SAW CENTRE / CLUB SAW. OTTAWA, ON

Pique @ Arts Court, Ottawa. Photo: Serena Yang.

Like nested Russian dolls, Ottawa's 285-capacity Club SAW sits inside long-running artist-run centre SAW, which in turn occupies the western wing of Arts Court, a multi-arts facility occupying a former courthouse building just south of the Byward Market in the city centre.

With over 100 different user groups supporting 1,000 performing artists annually, Club SAW is recognized within the Ottawa-Gatineau music scene as one of the city's most active and diverse live venues. With the ability to literally flip its walls from art gallery to rock club, it is the definition of a flexible space. Its adjoining courtyard also allows for indoor/outdoor programming. And with an in-house programmer, Rachel Weldon, also an established curator and founder of non-profit Debaser, SAW benefits from their vision and connections — expanding to the whole Arts Court facility with their quarterly Pique events.

One of the original Artist-Run Centres (ARCs) in Canada, SAW is celebrating its 50th anniversary in 2023. The organization was deeply embedded with live music from the start, as explained to us by curator Jason St-Laurent:

"SAW was created in 1973 on Sussex Drive. That's where the *name comes from, Sussex Annex Works. It used to be on the second floor of a legendary folk café called Le Hibou. Joni Mitchell came through there and believe it or not, Jimi Hendrix*[29]*. So there's always been this natural relationship between SAW and the music scene. Like most Artist-Run Centres, SAW was created by people, especially women, queer, and racialized artists, who weren't seeing themselves represented in major institutions. ARCs were created to create spaces where people could see themselves reflected on gallery walls.*

In addition to a gallery space, there was a screenprinting studio where people were making punk show posters and that sort of thing. There was no Canada Council funding at that time. People were having parties to survive, and with parties you need music. It made sense that SAW was tied to the music scene in one way or another. As you see today, that's something we've kept up over the years, which makes SAW unique in the Artist-Run Centre world, where we've always had a music venue or a music presentation program. And we're always surprised that not more ARCs have taken on that model of breaking down the silos between disciplines."

In 1989, SAW moved into the historic former Carleton County Court House, which had been taken over by the City of Ottawa and designated as its central arts hub. Sixteen arts groups now share the Arts Court complex, including the Ottawa Art Gallery, Ottawa Arts Council, and Ottawa Fringe. In the early 2000s, Club SAW became more established as a music venue distinct from the gallery. "We formalized our music program in terms of building a dedicated space for screenings, performance, and music," explains St-Laurent, "which before was just an all-around flexible space where you would have bands performing in the middle of the gallery."

29 A recently released 1968 recording of Mitchell performing at Le Hibou Coffee House was captured on tape by Hendrix himself. Reilly, Nick. "Joni Mitchell to release early coffee shop performance recorded by Jimi Hendrix." *NME*. July 29, 2021. Available online: https://www.nme.com/news/music/joni-mitchell-to-release-early-coffee-shop-performance-recorded-by-jimi-hendrix-3005909

The City kicked off a major Arts Court Redevelopment project in 2015[30], for which SAW had to raise almost $1,000,000. They achieved their goal through both public grants and an affordably priced capital campaign, where community members could donate $50 and have their signature reproduced on a donor wall. In 2019, SAW's expansion and renovation quadrupled their space, with Club SAW tripling in size and including the adjoining outdoor courtyard area. St-Laurent credits a productive, positive relationship with the City as a big factor in this success: the municipality does not charge the organizations rent in their public exhibition or performance spaces — as these function effectively like community centres — but they are all responsible for the costs of their own admin offices.

Music programmer Rachel Weldon came on board to help program SAW's grand reopening in 2019[31]. A music blogger and campus radio programmer, Weldon founded independent music series Debaser in 2013, presenting events at various venues around Ottawa. She describes Debaser's mix of genres as "underrepresented, experimental, outsider, fringe, avant-garde, innovative, new" and the organization programs through a lens of equity, diversity and inclusion.

Through her partnership with SAW, in 2021 — as pandemic restrictions began to be lifted — Debaser launched Pique, a quarterly "multi-level building-wide music and arts event" that now takes over the entire Arts Court complex for a whole day each season, animated through partnerships with the other tenant groups. A wild success from the start, Pique became something like Nuit Blanche under one roof, giving Arts Court's galleries the opportunity to open after hours and Debaser the chance to program additional stages.

"The [June 2022] edition of Pique was probably the most diverse in terms of genre and style," says Weldon about the event's then-latest instalment. "We had a new classical work in one room, mutant disco dance-punk out in the courtyard and EDM in the club. My hope and dream for Pique is that people just trust the curation."

Cohesive events like Pique help solidify Arts Court as a civic arts hub while at the same time providing paid, high-profile performance opportunities for emerging or marginalized artists — and also helping to facilitate cross-disciplinary collaborations. Year-round, this "conversation" between art and music continues at Club SAW, which physically is designed with multidisciplinary modularity in mind: the walls of the club can fold out to hang artworks for daytime exhibitions, and then be closed in to protect the art. Weldon also lauds the space's enhanced accessibility features, such as automatic doors, wheelchair accessible bathrooms, and an elevator lift for the stage.

30 "City celebrates the official completion of the Arts Court Redevelopment project." City of Ottawa. September 26, 2022. Available online: https://ottawa.ca/en/news/city-celebrates-official-completion-arts-court-redevelopment-project

31 CBC News. "Revamped SAW Gallery to maintain edgy artistic spirit." CBC News. July 19, 2019. Available online: https://www.cbc.ca/news/canada/ottawa/saw-gallery-reopens-after-two-year-hiatus-1.5209980

☛ *Club Saw's moveable walls allow it to physically transform from club to art gallery.*

Photo: Ming Wu

SAW's business model also prevents the club's calendar from getting dominated by outside rentals. "Our venue has a strict cultural mandate," says St-Laurent. "We don't do private events, we don't do weddings. It's got to be culture. It can be punk, which is just as valuable to us as a hoity-toity experimental film program. Everyone who comes in here is subsidized in a way, because we use our bar profits to make our rental fees super affordable."

It's worth acknowledging that few aspiring arts centres will have the 50-year head start that a long-running institution like SAW has, and their present-day success is rooted in five decades of close collaboration between live music and other art forms. But it's also never too late to begin.

THE VENUE IN THE ARTS CENTRE

NATIONAL VENUE PROFILE: PHI CENTRE. MONTREAL, QC

Tucked away among the historic stone buildings of Old Montreal is a handsome, four-story square edifice. This is the home of the PHI Centre (*en français, Centre PHI*), a contemporary arts centre that's also home to performance spaces, exhibition galleries, and meeting rooms. As PHI's website states, "the PHI Centre is at the intersection of art, film, music, design and technology."

PHI's 180-capacity ground floor performance venue, Espace 1, is equipped with state-of-the-art sound, lighting, and projection facilities — and fully soundproofed from the rest of the centre. The space hosts the centre's own musical programming as well as co-productions with local music organizations such as OK Là, Pop Montreal, and Suoni per il Popolo. Director of Programming Renelle Desjardins says of the centre's musical vision, "there is a contemporary feel, but it also has to be accessible." Recent bookings include Debby Friday, Pierre Kwenders, and U.S. Girls.

The building's other rooms and spaces — including a rooftop patio or terrace which can also be used for performances — feature exhibitions of multimedia, installations, VR, sound art, and other contemporary work. Art stars from Jenny Holzer to Yoko Ono have shown at PHI.

As musical programming does not happen at PHI every week and its front-facing image is that of a gallery, Desjardins says, "It took a while for the community in Montreal to understand that we had a venue. And we treated it not as a rental space for any promoter to come in. We program things that are within our parameters of what we like; the DNA of PHI, so to speak."

PHI also wishes to present live music in unconventional, flexible ways. "*Ils sont de la marge*. They're underground," says Desjardins of the musicians they work with. "They do it all DIY and they have a vision of their show. Collis Browne [wanted] the piano in the middle of the room where people can just walk around. It's timely because there's this shift in artists' minds that they don't want to go and do the bar run again, they want to reduce their traveling. They want to present their shows in a meaningful way. And that's what we try to support."

What gives PHI the autonomy to program such a pristine space with total artistic freedom? A unique financial position and history. It was founded by a visionary benefactor, Phoebe Greenberg. Coming from a well-known Ottawa real estate family[32], Greenberg produced film and theatre before choosing arts philanthropy. In 2005, she purchased the Art Deco building and made it the home of the PHI Foundation for Contemporary Art. Admission to PHI's gallery exhibitions is usually free, the result of a commitment to accessibility.

Unlike nearby contemporaries such as SAT (*Sociéte des arts technologiques*), PHI does not receive any public funding. "Phoebe Greenberg is our funding," says Desjardins, "and she funds it privately. She wanted to give back to Montreal." Nevertheless, Desjardins says the Centre is working toward financial self-sustainability and finding the right business model to reduce its dependence on Greenberg's beneficence. Meanwhile, the foundation is in the final stages of an international design competition[33] to build a new, more art-focused space, PHI Contemporary, in 2026, which will complement the existing Old Montreal building nearby.

32 Everett-Green, Robert. "Montreal's Phoebe Greenberg: She's not your everyday arts maven." *The Globe and Mail*. March 23, 2013. Available online: www.theglobeandmail.com/arts/art-and-architecture/montreals-phoebe-greenberg-shes-not-your-everyday-arts-maven/article10171879/

33 "The Architects." PHI Contemporary | A new space for arts and culture | Old Montreal. Retrieved 2023. Available online: https://phi.ca/en/phi-contemporary/#architects

THE VENUE IN THE ARTS CENTRE

INTERNATIONAL EXAMPLE: TRANS EUROPE HALLES (VARIOUS LOCATIONS AROUND THE EU, UK & ELSEWHERE)

Basis Vingschau Venosta: an old military barracks in northern Italy, now a multipurpose community hub with an event space called the Kasino. Moritzbastei: a historic, partially underground fortification in Leipzig, Germany, that now hosts concerts, theatre, parties, and readings. La Station — Gare des Mines: a disused '50s coal station in the north end of Paris, where crowds gather to dance to electronic artists both indoors and outdoors. Village Underground: a music venue in a Victorian-era East London warehouse, topped with two shipping containers and four greenhouse-like Tube carriages that are used as artists' workspaces.

These are just four of the 126 members of Trans Europe Halles, a network of independent cultural centres across Europe and the United Kingdom, with recent expansion in other continents. Two-thirds (84) of these centres include either a concert venue or outdoor stage[34]. Founded in 1983 by a group of seven arts centres across Western Europe, TEH has spent the last 40 years fighting to reclaim abandoned or under-used spaces — many left behind by the political changes related to the fall of the Iron Curtain and the establishment of the European Union — and repurpose them for arts, culture, activism, social justice and ecological sustainability.

The availability of such spaces, combined with generous public funding, makes the model of a multi-arts centre commonplace in Europe. It is not unexpected for both cities

34 "Members." Trans Europe Halles. Retrieved 2023. Available online: https://teh.net/members/

BASIS Vinschgau Venosta, Silandro IT. Photo: Samuel Holzner.

and rural areas to host cultural centres that could include a dizzying range of facilities and activities: not just concert stages but also bakeries, classrooms, gardens, dance studios, wind turbines, recycling centres, apartments, and childcare facilities (these are all included in just one centre, ufaFabrik in Berlin). Not to mention, of course, relaxed cafe patios, which fulfill a vital socializing and networking component. Visiting such spaces can be envy-inducing for visitors from overseas.

TEH defines "independent" as non-governmental organisations, and it's important to note that, though there is public support that ensures their ongoing viability, their member spaces are all rooted in the community and the desire among artists and citizens to claim space that increases their overall quality of life. There is also strong internal and mutual support within the network, which meets twice annually for a conference, which includes a general assembly in which all full members can vote democratically on major decisions. It's a model, both of space-use and community organization, that provides endless inspiration for Ontario and Canada.

THE MUSIC CENTRE

Similar to the multidisciplinary arts centre, but involving a clustering of music-centric uses, the Music Centre is a venue model that has the potential to speak to issues around affordability, innovation, and community. A Music Centre would include a venue (or multiple venues) at the heart of a building that could also incorporate rehearsal space, recording studios, workshop/educational space, cafe/socializing space, office space for music businesses or companies, and more.

This idea was well-received by survey respondents, especially in Toronto, as the availability of rehearsal spaces in the city has significantly decreased in recent years[35]. The need for rehearsal spaces could make a business case for a music centre that also permits live performance alongside other music-related activities and services. It would also help to green the music scene and reduce transportation costs for local musicians, who could perform, record and rehearse under one roof.

Central challenges to a Music Centre are architectural and financial. Architectural challenges would be posed by the need for soundproofing so that diverse musical activities could be conducted in different rooms simultaneously. Financial challenges come from rising land value and rental costs, plus a relatively fixed ceiling on rates for rehearsal rooms given the limited income of many artists.

The City of Toronto previously expressed interest in supporting the creation of a "physical music hub" which would "act as the epicentre of the city's music community" in its 2016 Music Strategy[36]. Such a venture could potentially take the form of a for-profit/non-profit partnership — for example, a non-profit presenter or charitable organization could partner with a record label or management company to share space. It would be a forward-thinking move for one of Canada's major label record companies to provide rehearsal and/or recording studio space to support the artist development pipeline. Similarly, a number of the case studies (see sidebars) involve non-profits supported by philanthropic giving.

35 Blackman, Cheryl. *Music Rehearsal Spaces in the City of Toronto.* City of Toronto. January 6, 2022. Available online: https://www.toronto.ca/legdocs/mmis/2022/ec/bgrd/backgroundfile-174917.pdf

36 Toronto Music Advisory Council. *Toronto Music Strategy: Supporting and Growing the City's Music Sector*. February 2016. City of Toronto. Available online: https://www.toronto.ca/legdocs/mmis/2016/ed/bgrd/backgroundfile-90615.pdf. It's worth noting that the follow-up 2022-26 Music Strategy did not mention the goal of a central, physical hub but rather recommended the City help "facilitate varied, accessible space" for the music community.

Another idea would be something like the Toronto-based Akin Collective, who offer affordable studio space for visual artists, and have shown interest in providing rehearsal space for musicians — though it must be acknowledged that painters and sculptors do not have the costly demands of soundproofing. The City of Toronto report recommends that potential operators access the Economic Development and Culture division's Commercial Space Rehabilitation Grant Program (launched November 2021) to help cover soundproofing expenses, as well as exploring the possibility of Section 37 Community Benefit Charge funding.

Leaving aside the question of rehearsal facilities, many concert venues now offer recording options, either within the performance space or in an adjoining studio. Board mixes have long been standard and nowadays, high-quality, multitrack live recordings are easily accomplished with laptops and DAWs (digital audio workstations). Such capabilities became of vital importance during COVID-19, when concerts were shut down and livestreams or pre-recorded online performances were the only option, with venues like Bridgeworks in Hamilton investing in high-definition audio and video capture.

Long-running Toronto new-music spaces such as the Music Gallery and Arraymusic's Array Space are also available for both recording and rehearsals on nights when they are not hosting concerts. Other examples of spaces around Ontario that offer both performance and recording facilities include Aeolian Hall (London), Royal City Music Studio (Guelph), and Sessions on the River (Fort Erie).

But beyond offering a space to play or lay down tracks and a place to socialize with other musicians, what may make a venue a Music Centre is taking an active role in the growth of artists and their careers, whether it be through mentorship, residencies, workshops, commissioning, or other professional development opportunities.

THE MUSIC CENTRE

PROVINCIAL EXAMPLE: ALLIED MUSIC CENTRE. TORONTO, ON

Deerhoof @ Wavelengh Winter Festival, TD Music Hall, Toronto. Photo: Danielle Burton.

To call Massey Hall "historic" would be an understatement. One of the country's longest-running live music venues, opening in 1894, Canada's equivalent to Carnegie Hall has been home to the Toronto Symphony Orchestra as well as legendary shows by Gordon Lightfoot, Neil Young, Rush, and "the Quintet" (Dizzy Gillespie, Charlie Parker, Bud Powell, Charles Mingus, and Max Roach, as immortalized in the 1953 recording *Jazz at Massey Hall*).

It was just as monumental when Massey reopened its doors in November 2021 following a three-year, $184 million redevelopment. Though it might have been fortuitous that the hall missed most of the pain of lockdowns, the pandemic still caused construction and fundraising delays, made more challenging by the 2019 death of their president and CEO, Deane Cameron[37].

The redevelopment project saw the 2,500- to 2,800-capacity[38] auditorium lovingly restored and renovated, including the additions of an accessibility elevator and a folding seating system allowing for a general admission area on the floor. But all that was in addition to an expansion that saw Massey Hall become a part of the Allied Music Centre. This partnership with developers Allied Properties is envisioned as a "multi-purpose performance facility."

Consisting of a seven-storey glass tower adjoining the original hall, AMC will include two new venues, a recording studio, and rehearsal space. The first of the new venues, TD Music Hall, opened its doors in February 2023 — a fourth-floor, 500-capacity club space of comparable size to Toronto's Axis Club or Lee's Palace, but with floor-to-ceiling windows behind the stage.

The second venue is a 100-capacity space on the sixth floor with an unrevealed name and opening date, to be used for emerging artist concerts, student recitals, and panel discussions[39]." A forthcoming lounge on the same floor is intended to be a networking or co-working space. The seventh floor will offer a recording/rehearsal studio "with artist development in mind."

37 Bliss, Karen. "Massey Hall Pulls Off 'Minor Miracle' to Reopen After 3-Year, $146 Million Revamp." *Billboard*. November 29, 2021. Available online: https://www.billboard.com/pro/massey-hall-reopening-renovations-toronto-venue/

38 Gregory, Allie. "Take a Look Inside Toronto's Newly Revitalized Massey Hall." *Exclaim!*. November 25, 2021. Available online: https://exclaim.ca/music/article/massey_hall_to_open_its_doors_for_the_first_time_since_2018

39 "Revitalization." Massey Hall. Retrieved 2023. Available online: https://masseyhall.mhrth.com/revitalization

THE MUSIC CENTRE

INTERNATIONAL VENUE PROFILE: NATIONAL SAWDUST. BROOKLYN, NY (USA)

Photo: Vicente Munoz

National Sawdust occupies a modest brick building in Williamsburg, Brooklyn, whose outside walls are brought to life by a splashy, colourful, abstract mural. Inside, visitors will discover an architecturally miraculous, pristine performance hall — with a distinct, duochromatic design pattern and flexible seating that can be configured for an intimate audience of various sizes[40] — that is one of New York City's premiere stages for iconoclastic, emerging artists from the world of classical or notated music.

Opened in 2015, National Sawdust took its name from a previous occupant, an early 20th-century factory which indeed manufactured sawdust. The hall was the brainchild of Kevin Dolan, an amateur musician and professional tax lawyer[41], who partnered with composer Paola Prestini, who came on board as founding Artistic Director. Prestini is part of a younger generation of new-music composers and connected to elder statesmen like Steve Reich and Philip Glass[42]. NYC has been the global centre of what could be called "indie classical," home to labels like Brassland and New Amsterdam; in 2008, it saw the opening of (Le) Poisson Rouge, a licensed club that booked contemporary ensembles next to rock bands and DJs, a provocative alternative to the stuffiness of the concert hall.

Incorporated as a non-profit, National Sawdust offers a "third way," combining institutional stability and financial innovation with multigenerational, cross-genre accessibility. Its three-year renovation cost $15 million USD. Pristine sound separation was accomplished by suspending the entire concrete performance room on shock-absorbent springs — essentially a "box within a box[43]" that seals the audience in silence[44]. The hall programs close to 100 concerts per year[45]. Past performers include Yo-Yo Ma, Yo La Tengo, Pussy Riot, Tanya Tagaq, and Laurie Anderson.

In addition to its performance space, National Sawdust includes a basement recording studio, but the main hall doubles as rehearsal or recording facility during the daytime. An in-house non-profit label also named National Sawdust releases music digitally through Bandcamp and other DSPs. But what truly makes it a "Music Centre" is its commitment to being an artistic incubator through a robust mentorship program that includes an equity-focused Artist-in-Residence program.

With a state-of-the-art performance environment supporting such innovative, high-calibre musicians and composers, one might wonder how the institution covers all the expenses on its balance sheet. Dolan founded the venue with long-term sustainability in mind, ensuring it would not pay rent for its first five years of operation, persuading patrons to buy shares in the building and later "donate the venue to the nonprofit that runs it — and write off more than they invested.[46]"

The organization now has an annual budget of over $4 million USD and in 2020 supported 76 employees[47]. Outgoing[48] managing director Brian Berkopec was candid about the organization's financial strategy in an interview. "The organization is on a contributed basis doing anywhere from $2.5 to $3 million [USD] a year of essentially donations," he explains. "That could be individuals, Board members, foundations, and government. Sawdust's contributed revenue benefits from a very supportive in-Board leadership. The organization has about 30% of its funding coming from the Board, which is really strong." Though the United States has a longer tradition of private philanthropy, this solid base of community support is sobering to consider in grant-dependent Canada.

40 Woolfe, Zachary. "National Sawdust, a Music Space Years in the Making, Opens in Brooklyn." *The New York Times*. October 2, 2015. Available online: https://www.nytimes.com/2015/10/03/arts/music/national-sawdust-a-music-space-years-in-the-making-opens-in-brooklyn.html

41 Disser, Nicole. "Inside Williamsburg's Ambitious New-Music Venue, National Sawdust." *Bedford + Bowery*. October 1, 2015. Available online: https://bedfordandbowery.com/2015/10/inside-williamsburgs-ambitious-new-music-venue-national-sawdust/

42 Davidson, Justin. "Can This Start-up With Cellos Shake Up Classical Music's Business-As-Usual?" *Vulture*. September 9, 2015. Available online: https://www.vulture.com/2015/09/national-sawdust-new-carnegie-hall.html

43 Baird, Robert. "National Sawdust: An Artistic Incubator." *Stereophile*. May 8, 2018. Available online: https://www.stereophile.com/content/national-sawdust-artistic-incubator

44 Bryce, Emma. "This innovative auditorium is sealed in perfect silence." *Wired*. February 16, 2016. Available online: https://www.wired.co.uk/article/national-sawdust-new-york

45 "National Sawdust | Brooklyn, NY." *Cause IQ*. Retrieved 2023. Available online: https://www.causeiq.com/organizations/national-sawdust,272974840/

46 Davidson, Justin. "Can This Start-up With Cellos Shake Up Classical Music's Business-As-Usual?" *Vulture*. September 9, 2015. Available online: https://www.vulture.com/2015/09/national-sawdust-new-carnegie-hall.html

47 "National Sawdust | Brooklyn, NY." *Cause IQ*. Retrieved 2023. Available online: https://www.causeiq.com/organizations/national-sawdust,272974840/

48 In December 2022, Ana De Archuleta, previously the organization's Director of Artistic Operations, took over as Managing Director from Berkopec, who moved on to other opportunities. This makes National Sawdust "the rare New York cultural institution to be led by women." Cristi, A.A. "National Sawdust Names Ana De Archuleta Managing Director." *Broadway World*. December 19, 2022. Available online: https://www.broadwayworld.com/off-broadway/article/National-Sawdust-Names-Ana-De-Archuleta-Managing-Director-20221219

PROTECTING MUSIC VENUES FROM RAPID RENT AND REAL ESTATE MARKET CHANGES

How can small venues be protected from the threat of displacement? Long-term, the solution is obviously ownership of their own properties. But with property values still overheated in the Ontario market, an outright purchase is in the realm of fantasy for most venue operators. Property values in Toronto's coveted downtown west end are much higher, and because of the benefits of clustering, many venues are hesitant to move to lower-cost options in the east end.

As the residential real estate market becomes even more deeply unaffordable, many who seek spatial justice are turning to alternative models of community ownership for homes. Can the same concept be applied to cultural spaces such as music venues?

Community Land Trusts are one solution to this issue. CLTs are co-operative ventures that require members of a community to work together to raise funds or otherwise gain ownership of property by a non-profit trust, which then sells or leases buildings or space to community members at perpetually affordable rates. Removing land from the market also gets rid of the threats of unjust evictions and — venue operators' worst nightmares — landlords selling buildings to condo developers.

COMMUNITY OWNERSHIP? COMMUNITY OR CULTURAL LAND TRUSTS (CLTS)

A cultural land trust is essentially a community land trust with a cultural focus. Creating such a space that might include a music venue is admittedly a long-term solution, as establishing a CLT is not an easy task. It is a complicated venture involving challenges related to community organization, legal frameworks, fundraising, research, location scouting, site remediation, construction, management, and much, much more.

The three main feature of the "classic" CLT[52] are:

1. **Ownership**
   Land title is held by a non-profit organization, and buildings on that land are sold to homeowners, non-profits, or other corporations or individuals, who typically sign a long-term (typically 99-year) ground lease.

2. **Organization**
   The non-profit that runs the CLT has a membership structure open to anyone within its service area, and the governing board has a tripartite structure equally representing leaseholders, area residents, and elected officials.

52 "What Is a Community Land Trust?" Center for Community Land Trust Innovation. Retrieved 2023. Available online:: https://cltweb.org/what-is-a-community-land-trust/

THE MUSIC CENTRE

INTERNATIONAL EXAMPLE: P60. AMSTELVEEN(NETHERLANDS)

Rehearsal room @ P60

The Music Centre Music centres that include rehearsal spaces alongside a central venue are rare worldwide, especially those with affordable rehearsal rooms for local or emerging artists. P60 is an exception. Located in Amstelveen, in suburban Amsterdam just east of Schiphol Airport, P60 was opened in 2001 by Gerard Lohuis, who is still acting as the venue's managing director. Amsterdam has had a vibrant DIY indie music scene going back to the '70s, producing groups such as the Ex and Altin Gün, as well as Dutch rap ("Nederhop") artists like Ali Bouali and Def Rhymz.

The 22,000 ft^2 complex includes a 600-capacity venue — booking local and touring rock, pop, indie, metal, punk, blues, and EDM artists as well as comedians — a bar/restaurant and three rehearsal spaces. Two of the rooms feature backline (drums and amps) for bands, while the third offers DJ equipment such as turntables, CDJs, and a mixer, with rates starting at 10 euros an hour. P60 also contributes to artist development by offering workshops including lessons in drumming, singing, and DJing, as well as participation in the "pop choir," Popkoor Amstelveen[49].

What also sets P60 apart from other cultural centres is its explicitly pop-focused programming and youth-oriented mandate, targeting audiences aged 12–30. "Young adults are living a delicate moment of unemployment, lack of opportunities, and disorientation," says Lohuis. "We try to [motivate them] with passion and creativity. We provide them the feeling of being at home."[50]

With events attracting 45,000 people annually, managed by a team of eight full-time employees and four volunteers from European Voluntary Service, as well as over 70 local volunteers, P60 keeps the lights on with municipal funding from Amstelveen and sponsorships, as well as ticketing/facility fees, bar revenue, and limited external rentals, hosting just nine outside events in 2021[51].

49 "Info." P60. Retrieved 2023. Available online: https://p60.nl/en/info

50 "P60." Creative Lenses. Retrieved 2023. Available online: https://creativelenses.eu/page/catalysts-p60/

51 "Jaarverslag P60 2021." P60. 2021. Available online: https://p60.nl/sites/default/files/inline-files/Jaarverslag%20P60%202021.pdf

3. **Operation**
   An organizational commitment to equity, community care, preserving permanent affordability of housing and other buildings, and maintaining those structures in good repair.

Close to half of the currently active land trusts in Canada have been established since 2014[53]. Canadian CLTs receive a degree of political support, and often receive grant funding or other financial assistance. Ontario members of the CNCLT (Canadian Network Community Land Trust) are located in Chatham-Kent, Hamilton, Muskoka, Owen Sound, Ottawa, Toronto, and Waterloo.

CULTURAL LAND TRUSTS (IN CANADA AND ABROAD)

Applying the principles of the community land trust model to arts and culture spaces is the basis of the cultural land trust concept. CLTs offer several promising features:

- **Security**: CLTs offer long-term security and perpetual affordability.
- **Autonomy**: A venue would likely be a leaseholder but would still maintain autonomy in terms of programming decisions.

53 ibid.

- **IDEA**: A CLT's governing structure may require more accountability and resources in terms of safety, physical accessibility or equitable representation.

Nevertheless, CLTs face significant hurdles. Some include:

- **Untested in the Canadian environment.** CLTs are currently mostly in the research phase in Canada's cultural sector, likely due to the capital fundraising requirements, the significant level of community engagement and organization entailed, and unfamiliarity with the model outside of urban planning or social justice networks.
- **Live music sector organizational culture.** The live music sector is also notoriously driven by "lone wolf" operators that are often resistant to intra-sectoral co-operation efforts. The Canadian Live Music Association was only established in 2014 and did not reach a critical mass of membership and engagement until the COVID lockdowns of 2020 — which by necessity forced more information-sharing and support within the sector. By contrast, the Canadian Independent Music Association, which represents the country's recording industry, has a history going back to 1971, while equivalents in other performing arts disciplines were founded in the '70s and '80s. The generalized threat of rising real estate and insurance prices may precipitate more collective action in the live music sector.

HOW TO START A CLT (TORONTO STYLE)

The Parkdale Neighbourhood Land Trust (PNLT) in Toronto offers comprehensive resources for anyone looking to start a community land trust, with their website effectively operating as an open-source how-to guide. Research and mapping exercises resulted in the PLNT incorporating as a non-profit in 2014. Within five years, it purchased its first building, a 15-unit, at-risk, low-rent property on Maynard Avenue. The City of Toronto contributed $1.5 million to the sale and the province put in $600K toward building improvements[58]. This was followed by the purchase of a 36-unit building in 2021, and 153 single-family homes across Toronto's west end the following year[59].

58 Ngan, Jadine. "Community land trusts could help provide affordable housing we so desperately need." *Broadview Magazine*. May 17, 2022. Available online: https://broadview.org/community-land-trusts/

59 "Starting a CLT." Parkdale Neighbourhood Land Trust. Retrieved 2023. Available online: http://www.pnlt.ca/clt-tool-kit/starting-a-clt/

Kensington Market Community Land Trust @ 54-56 Kensington Ave. Photo: Ryan Rubin.

The Kensington Market Community Land Trust evolved out of a neighbourhood group, Friends of Kensington Market, founded in 2013, who were also concerned about gentrification's impacts on the diverse, mixed-use district's unique character. The KMCLT incorporated in 2017, and four years later they purchased their first building, at 54–56 Kensington Avenue[60], with the help of Councillor Mike Layton and neighbourhood donors[61]. In addition to apartments upstairs, the three-storey building is well-known in the area for housing a long-running variety store on its ground floor — demonstrating that CLTs can also accommodate small-business uses — as well as its sidewalk and "the Stoop," the adjoining, mural-adorned alleyway that has long-been a daily hangout for punk rockers[62]. Protecting such intangible usage became a priority for the land trust. The KMCLT is currently working to develop proposals for new uses for the surface Green P parking lot at 25 Bellevue Avenue, with the aim of developing a mixed-use building incorporating affordable housing[63].

60 "History and Governance." Kensington Market Community Land Trust. Retrieved 2023. Available online: https://kmclt.ca/HISTORY-GOVERNANCE

61 "Our Sites." Kensington Market Community Land Trust. Retrieved 2023. Available online: https://kmclt.ca/OUR-SITES-1

62 Ngan, Jadine. "Community land trusts could help provide affordable housing we so desperately need." *Broadview Magazine*. May 17, 2022. Available online: https://broadview.org/community-land-trusts/

63 Bunce, S. & Barndt, J. (2020). Origins and Evolution of Urban Community Land Trusts in Canada | In: John E. Davis, L. Algeod, & M. Hernandez (Eds.). On Common Ground: International Perspectives on Community Land Trusts. Terra Nostra Press, Madison. pp. 89-108.

CULTURAL LAND TRUSTS

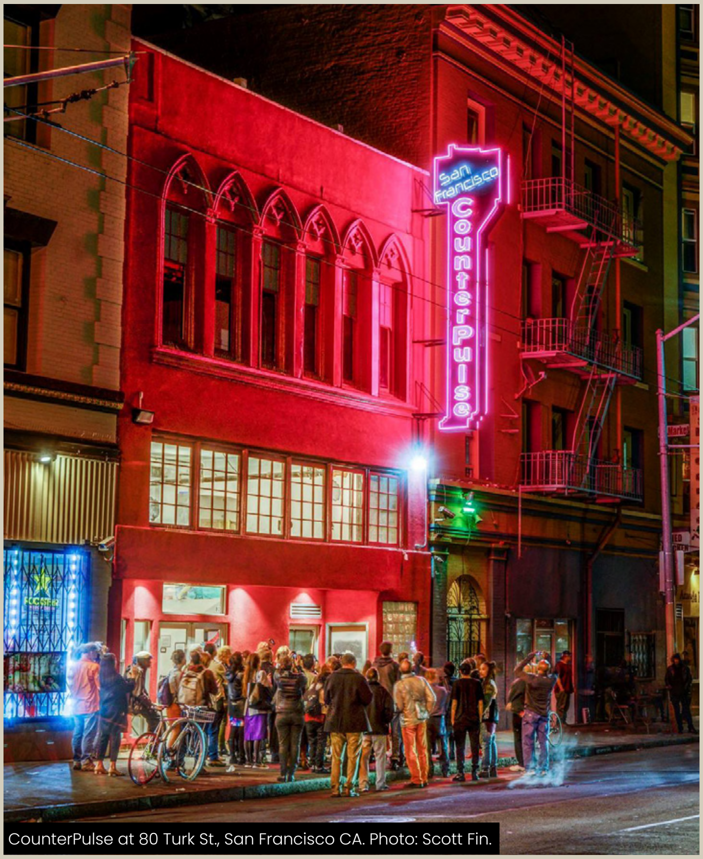
INTERNATIONAL EXAMPLE: CAST (COMMUNITY ARTS STABILIZATION TRUST). SAN FRANCISCO, OAKLAND AND SAN JOSE, CA (USA)

A non-profit organization established in 2013 with a $5 million USD grant from the Kenneth Rainin Foundation[64], CAST develops partnerships to purchase real estate property and secure it permanently for arts and culture organizations through various mechanisms including a lease-to-own model. Operating in the San Francisco Bay Area, one of the US's least affordable urban areas, CAST currently owns four properties, including CounterPulse (a multidisciplinary performance space with a 30+ year history that moved into a building in SF's Tenderloin district in 2015 as part of a pilot partnership with CAST[65]) and 447 Minna (a 10,200 ft^2 hub launched in 2022 featuring live music, experimental theatre by resident companies like the SF Neo-Futurists, and dedicated support for its SoMa neighbourhood's longstanding Filipino and LGBTQIA+ communities[66]).

64 Ionescu, Diana. "Arts-Oriented Land Trusts Preserve Affordable Cultural Spaces." *Planetizen*. December 14, 2020. Available online: https://www.planetizen.com/news/2020/12/111514-arts-oriented-land-trusts-preserve-affordable-cultural-spaces

65 Mission & History." CounterPulse. Retrieved 2023. Available online: https://counterpulse.org/mission-history/

66 "About." 447 Minna. Retrieved 2023. Available online: https://www.447minna.com/about-447-minna



CounterPulse at 80 Turk St., San Francisco CA. Photo: Scott Fin.

- **Reputational dynamics.** Other intangible, interpersonal factors may be a deterrent, as some urban planners share that CLTs "can get a 'bad rap' for infighting or neighbourhood drama[54]". Considering the time investment required and the need for trust and consensus-building, it may not be something every venue operator would have the patience for.

Organizations currently engaged in research on cultural land trusts in Canada include 221A (Vancouver, BC) and digitally-oriented arts service organization Artspond (Toronto). 221A, a non-profit artist-run centre and cultural space provider based in Vancouver's Chinatown district with a mission of "connecting artists with infrastructure," has been conducting a "sector R&D" project since 2018, "supporting the creation of an independent Cultural Land Trust." The CLT was incorporated in 2021 and completed a business planning phase in 2022. Its long-term vision is to secure 30 properties in British Columbia by the year 2050, to ensure both secure tenancy and building "shared equity" for artists and arts organizations.

221A's work aligns with *Culture|Shift*, the 10-year (2020-29) Vancouver Culture Plan, which also includes the Vancouver Music Strategy. The plan included a target of 800,000 ft^2 of "new, repurposed or expanded cultural space" over 10 years with a goal of "no net loss" of cultural spaces[55], and also recommended that Vancouver should support community ownership and community-led projects, such as the establishment of a cultural land trust.[56] This was echoed in Vancouver's 2019 Music Strategy.[57]

Though cultural land trusts remain conceptual in Canada, there are already existing public funding programs that are potential candidates to support such initiatives, such as the Department of Canadian Heritage's Cultural Spaces Canada Fund and the Ontario Trillium Foundation's Community Building Fund.

54 Ngan, Jadine. "Community land trusts could help provide affordable housing we so desperately need." *Broadview Magazine*. May 17, 2022. Available online: https://broadview.org/community-land-trusts/

55 "Making Space for Arts and Culture: Draft Vancouver Cultural Infrastructure Plan." City of Vancouver. September 3, 2019. Available online: https://council.vancouver.ca/20190910/documents/ACCS-RTS13175-AppendixD-MakingSpaceforArtsandCulture.PDF p. 2

56 ibid. p. 33

57 "Vancouver Music Strategy: Draft Final Report." City of Vancouver Cultural Services. September 10, 2019. Available online: https://council.vancouver.ca/20190910/documents/ACCS-RTS13175-AppendixE-VancouverMusicStrategy.PDF p. 40

CULTURAL LAND TRUSTS

INTERNATIONAL EXAMPLE: AUSTIN CULTURAL TRUST. AUSTIN, TX (USA)

In 2018, the City of Austin, via the AECD (Austin Economic Development Corporation), established its own community arts stabilization trust to "create, through purchase and long-term lease, affordable spaces that support artists and arts organizations, [preserve] historic and iconic cultural buildings and spaces for creative and cultural uses, and [function] in a way that provides for cultural assets to exist in all parts of the city[67]."

With a $16.9 million USD investment of funding from the city, the trust issued an RFP (Request for Proposals) in 2021, with 45 submissions narrowed down to a shortlist of 14 proposals. There are two fund sources, each requiring unique criteria for selection. The Creative Spaces fund ($12M) looked for projects that aligned with the recommendations put forth by the City's Music and Arts Commissions (essentially volunteer advisory boards similar to the Toronto Music Advisory Committee). These recommendations considered geography within the city, amenities (which include performance and rehearsal space), and equity — for example, operational leadership of organizations should include 33% of people

Photo: Faith Davis

from "underserved/marginalized groups or communities of colour." The Iconic Venue fund ($7.4M) is supporting historic independent live music venues to stay in their current locations, often in very high-rent locations. At the time of this writing, one iconic venue is about to be announced, and two others are in negotiations and two creative space projects have been announced, and two are still being negotiated.

67 "Austin Cultural Trust." Austin Economic Development Corporation. Retrieved 2023. Available online: https://www.austinedc.org/cultural-trust

CULTURAL LAND TRUSTS

INTERNATIONAL PROFILE: MUSIC VENUE TRUST / MUSIC VENUE PROPERTIES. LONDON (UK)

Photo: Samuel Regan-Asante

The National Trust is an iconic piece of British culture, and in 2014, longtime venue owner Mark Davyd aimed to start his own version, but for live music venues rather than castles or countryside. Addressing the issue of community ownership was a long-term goal of Davyd's Music Venue Trust from the start, but it was an element of their mission they were only able to address very recently — the community that the trust aimed to serve had more urgent fires to put out.

"We quickly discovered that we had to do a whole load of work stabilizing the sector in the first place," says MVT venue support manager Clara Cullen. "Between 2006 and 2016, 35% of all grassroots music venues in the UK closed. So we said, 'Let's try and tackle that issue first. Let's try and stem the closure of music venues. And then, once we feel we've achieved that, we'll come back to this bigger idea of moving the ownership of grassroots music venues into a more public, community-focused model.'"

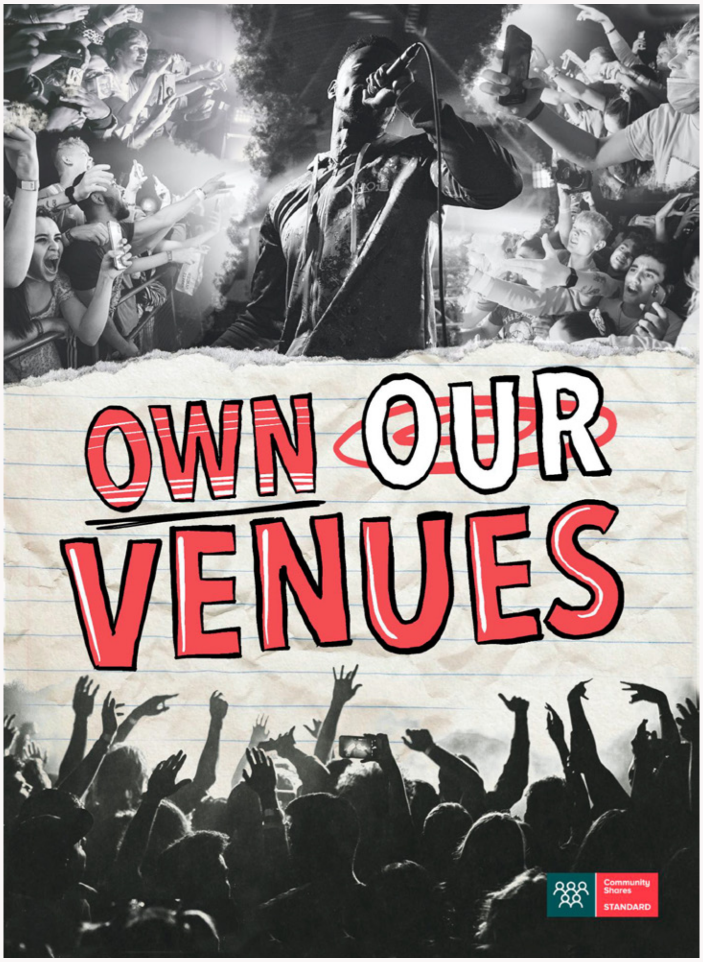
After incorporating as a charity, the Music Venue Trust acted as an advocacy group with a mission to "protect, secure and improve" the UK's grassroots music venues, while these spaces were under threat from gentrification, noise complaints, and other pre-COVID threats. They found that there was also a crucial lack of knowledge, data, and networking within the sector, and in 2015 they established the Music Venue Alliance (MVA), a national membership-based association that currently has 950 members.[68]

Founder/CEO Davyd is a co-owner of the Tunbridge Wells Forum, a 250-capacity venue in Kent, and with many team members possessing firsthand experience in the sector, the trust's activities are quite hands-on and practical, such as their Emergency Response Service, which assists spaces that may be in crisis or in imminent threat of shutdown. MVT has also recognized some of the sector's internal challenges, such as lack of investment and a shaky economic model[69].

Crucially, the Music Venue Trust is a publicity magnet, having garnered plenty of sympathetic media coverage in major publications like the *Guardian*, *BBC News*, and *NME* thanks to high-profile supporters like pop star Ed Sheeran.

68 "Join the Music Venues Alliance." Music Venue Trust. Retrieved 2023. Available online: https://www.musicvenuetrust.com/music-venues-alliance/

69 "Annual Report 2022." Music Venue Trust. 2022. Available online: https://www.musicvenuetrust.com/wp-content/uploads/2023/01/MVT_Annual-Report_FINAL_web-enabled_Single-Page-version.pdf.pagespeed.ce.9aZNccFsbl.pdf



In some ways, Music Venue Trust's purpose is similar in scope to that of the Canadian Live Music Association, albeit with a focus on smaller venues; the average size of an MVT member is approximately 300-capacity, with 26% of members having non-profit-status — an increase by nearly a factor of 10 (from 3-4%) since the trust was established in 2014.

All their efforts in the last half of the 2010s did pay off. Cullen recalls, "In January 2020, we were very excited. Because for the first time since 2006, more grassroots music venues were opening in the UK than closing. So we thought, 'Oh my God, we've done it, guys. We've got to the stage where we've stabilized the sector.' And then obviously along comes COVID and scuppers that entire thing."

But nonetheless, MVT was prepared to help venues weather the pandemic storm — thanks to aiding their members in accessing the Culture Recovery Fund — and change the usual narrative on venue closures.

Music Venue Properties: a Community Benefit Society (CBS)

As it did for so many in the live music sector worldwide, COVID gave the Music Venue Trust's members and leadership the time to stop, reflect, and reimagine themselves. And it gave the trust the chance to, at last, begin to realize one its original objectives: community ownership of venues.

Registered in 2021 and launched in 2022, Music Venue Properties (MVP) is a Community Benefit Society (CBS), a model that Co-operatives UK says is designed "to serve the broader interests of the community, in contrast to co-operative societies that serve the interests of members."

Unlike a straightforward charity, a CBS can raise money via Community Shares. Through the Own Our Venues campaign — or "share offer" — members of the music community can buy community shares in amounts ranging from £200 to £100,000. But though it may look like a crowd-funding campaign, it's not a donation — it's an investment, as stakeholders receive a 3% APR[70]. Unlike shares in a for-profit company, community shares cannot be sold or transferred, no extra dividends are received, and all members are entitled to one vote regardless of the number of shares they hold — meaning the structure is more democratic than wealth-driven.

The campaign's aim is to raise £3.5M (approximately $5.7M CAD) to purchase nine freehold properties that are home to grassroots music venues around the UK. In this pilot project, the society would buy these buildings from the landlord and rent them back to the operator at reduced rent in perpetuity. Rents will be calculated based on 6% of the amount spent purchasing each of these properties.

"It doesn't aim to create a profit, it can only create a surplus," says MVT ownership coordinator Matt Otridge. "And any surpluses will go back into buying more venues, because we can continue raising money through shares for as long as we want. The idea is to rent it back at a lower rate, to make contributions toward insurance and repairs, things that most landlords at the moment aren't doing. And most fundamentally, to give that kind of long-term assurance that they're going to be there."

Cullen affirms that the Our Own Venues campaign fulfills one of the Music Venue Trust's core objectives: "All of these issues that we're fighting, whether it's noise complaints or rising rents, it all goes back to the fact that the intentions of the venue operator, which is to program new and emerging talent, generally sits in almost direct opposition to the landlord who would much rather just turn the place into a Pret [à Manger] or a coffee shop."

The catch with such an initiative is that the landlords have to be willing to sell. Thankfully, the nine venues scouted for the pilot project are in amenable arrangements. Another challenge is the cost of real estate: none of the nine are located in London or anywhere in the southeast of England, as the property values are simply too high in those areas.

70 Music Venues Trust. "Own Our Venues." Crowdfunder. Retrieved 2023. Available online: https://www.crowdfunder.co.uk/uploads/projects/1342190/mvt_sod_(3).pdf

Do Make Say Think @ Wavelength Winter Festival, Danforth Music Hall, Toronto. Photo: Green Yang

POLICY RECOMMENDATIONS:

FROM IDEATION TO IMPLEMENTATION

International reviews of cultural policy often find that Ontario in general and Toronto in particular stand out in producing a large number of studies, reports, and other types of planning documents[71]. While this can understandably lead to cynicism among local stakeholders as the number of words and consultations grow relative to the amount of action and results, the expanding library of music policy documents does serve an important capacity-building function. It helps to consolidate disparate groups and actors into a more cohesive advocacy group with shared goals and convergent set of key policy levers. The process of creating and sharing policy documents plays a critical role in creating a consensus around what to do and who can do it[72].

71 Keidar, Noga, and Daniel Silver. "The space of ideas: Public art policy and the concept of urban model spaces." Journal of Urban Affairs (2022): 1-24.

72 Patterson, Matt, and Daniel Silver. "Turning the post-industrial city into the cultural city: The case of toronto's waterfront." *The Routledge Companion to the Cultural Industries* (2015): 284-296.

The past decade has produced a great deal of new cultural policy-making ideas in Ontario. Since 2014, at least 15 policy reports or studies have directly addressed live music in Ontario. Two others by the CLMA have had a national focus with clear implications for Ontario. There is no lack of ideas and recommendations.

Given this existing work, the current moment calls for consolidation, evaluation, and implementation:

- **Consolidation.** We review and synthesize the key recurrent recommendations found in past recent studies about live music in Ontario. We highlight points of consensus while also indicating gaps.

- **Evaluation.** One key gap we find concerns evaluation. As in many policy areas, there are a number of common policy ideas but very little by way of program and policy evaluation. A first set of recommendations is that the live music policy consensus can be strengthened by evaluating its policy suggestions and building evaluation frameworks into its forward-looking work, through the establishment of an LMEO (Live Music Ecosystem Observatory).

- **Implementation.** A major gap concerns implementation. Many recommendations become vague when it comes to discussing how an idea will be put into practice. While this report is ultimately no exception on this score, we suggest four general directions that may have promise for creating a stronger platform to implement a broad suite of common goals: building the Stage Truck, creating an Ontario Space for Music Foundation, expanding federal funding to live music, and advocating for a Cultural Renaissance 2.0.

Cadence Weapon @ Wavelength Summer Thing, Lithuanian House, Toronto.
Photo: Alex Carre

ONTARIO LIVE MUSIC POLICY REPORTS 2014–22

- London Music Strategy (City of London, 2014)
- Live Music Measures Up: An Economic Impact Analysis of Live Music in Ontario (Music Canada + Nordicity, 2015)
- Toronto Music Strategy (City of Toronto, 2016)
- Ottawa Music Strategy (City of Ottawa + Ottawa Music Industry Coalition, 2018)
- DIY Events in Toronto (City of Toronto, 2018)
- Vision for Ontario's Live Music Industry (Canadian Live Music Association, 2018)
- Toronto Nightlife Action Plan (City of Toronto, 2019)
- City-owned Spaces for DIY (Do-It-Yourself) Music Organizations (City of Toronto, 2020)
- Re: Venues: A Case and Path Forward for Toronto's Live Music Industry (Nordicity + Canadian Live Music Association, 2020)
- Re: Venues: A Case for Hamilton's Live Music Industry (Nordicity, 2020)
- Hamilton Music Industry Study (Sound Diplomacy, 2021)
- Emerging Entertainment Areas Outside the Downtown Core (City of Toronto, 2021)
- Closing the Gap: Impact & Representation of Indigenous, Black and People of Colour Live Music Workers in Canada (Canadian Live Music Association, 2022)
- Live Music: Public Perceptions (Canadian Live Music Association, 2022)
- Toronto Music Strategy: 2022-2026 (Nordicity + City of Toronto, 2022)


Moonbean @ Kazoo! Fest, Onyx, Guelph. Photo: Photo: Sean McCabe and Nicolette Hoang

CONSOLIDATION

A number of themes and recommendations recur across the Ontario music studies and reports that have appeared in the past decade. These represent what we might call an emerging "music ecosystem consensus." This consensus touches on a range of subjects.

- **Utilize underused spaces.** All 12 Ontario reports recommended increased use of underutilized spaces in one form or another. This is clearly an area of strong consensus, though there are diverse mechanisms suggested. Common suggestions include:
    - Making available public schools and community centres for performance and rehearsal.
    - Improving access to city-owned venues and spaces for performance and rehearsal. Toronto, for example, permits low-cost access to city-owned space to community-oriented or grassroots/DIY music organizations such as the It's Ok* Studios, in which the non-profit organization benefits from well below market-rent occupancy, only being responsible for monthly utilities, insurance and property tax. Similar municipal partnerships involving low-cost access include Bridgeworks in Hamilton and Arts Court in Ottawa.
    - Creating temporary permits for arts events, along with modernized licensing and zoning, to allow for pop-up and other shows in unconventional spaces.
- **Live music sector organizing.** Besides utilizing underused space, the most common recommendation is to build connections and cohesion among musicians, venue owner/operators, presenters, and other stakeholders such as city governments, BIAs, community groups, industry associations, and local politicians.
- **Municipal music officers.** Toronto and London have already created official music officers within their municipal governments, and Hamilton is considering one. This is a clear initiative that may appeal to other municipalities, with a view toward coordinating local stakeholders, advocating within local municipalities, and advancing a live music agenda to higher levels of government.
- **Support music education in public schools.** Music makers become music lovers, and public music education is a central mechanism in sustaining live music audiences and producing new talent.
- **Zoning, licensing, by-law, and other initiatives to create a more music-friendly business environment.** Common suggestions include tax subsidies for live music venues, group insurance plans, business licence reform to allow for categories beyond restaurants and nightclubs, zoning reform that permits venues to operate outside of downtown cores, and dedicated parking and loading zones. Successful reforms such as Toronto's Creative Co-Location Facilities Property Tax Subclass Designation can be a model for other municipalities.
- **Data collection.** Studies routinely call for the creation of inventories, maps, and directories of venues, promoters, and musicians, as well as more reliable measurements of the live music economy, its participants, and its audiences. Research into gaps and demand for new venues is another common refrain.

Mixto Fest @ Lynx Music, Toronto. Photo: Joshua Best

- **Marketing and tourism.** Many recommendations point toward better integration with municipal and provincial tourism initiatives, as well as branding efforts to foster musical tourism.

- **Musician compensation.** Making musician compensation transparent and fair, especially for city-sponsored initiatives, is another common topic. Suggestions include creating public listings of pay scales from venues and promoters, or requiring performers at city-run events to be remunerated to the Canadian Federation of Musicians union scale.

- **Safer spaces.** Recommendations in this arena include offering and perhaps requiring safer-space certification to receive public funding, developing and promulgating safe venue industry guides, and amplifying existing mental health and addiction supports.

- **Public funding.** Reports often call for increased public funding for live music. Increased grants are a common request, along with business credits for hiring local artists, or dedicated funds for small business loans and professional development. New taxes are also a common proposal, sometimes on the model of Toronto's billboard tax, which taxes activities that are thought to detract from the public realm to support artistic and cultural activities that enhance it.

- **Diversity and inclusion.** Many reports suggest avenues for increasing the diversity and inclusivity of the live music sector. In Toronto, this often focuses on expanding opportunities outside the downtown core, while more generally there is great interest in supporting professional development for members of underrepresented groups, encouraging a wider range of genres to be performed so as to feature a more diverse pool of performers, operators, and promoters.

- **Business and professional support.** Because producing live music in Ontario invariably involves accessing grant funding, dealing with city officials and by-laws, or forming business ventures, a number of reports recommend offering business and professional support and education.

- **Infrastructure.** Especially in larger cities, studies highlight the close connection between live music and public infrastructure. Expanding transit options to cultural events — especially at peak hours or late at night — is a common recommendation, along with improving lighting in high-traffic areas. Some suggest creating purpose-built infrastructure such as a music hub.

- **Good neighbour policies.** As downtowns intensify with more residents and live music gets pushed outside of the core into formerly residential areas, opportunities for conflict and complaint grow. Several studies suggest adopting an Agent of Change policy, whereby newcomers to a neighbourhood — whether that is new residential construction in an entertainment zone or new music venues in a residential zone — are required to bear most of the cost of sound dampening.

The central message that comes from consolidating these recommendations is that there exists a strong consensus among stakeholders as to the problems and solutions. Some are very specific, like creating a music officer, designating parking and loading zones, offering property tax subsidies, or defining new business licenses or zoning categories. Others are more general, such as increasing grant funding or using underused spaces. Overall, however, an Ontario policymaker interested in expanding live music in their city will have no shortage of ideas and recommendations about how to do so.

EVALUATION

Where a policymaker *will* find the existing research lacking, however, concerns which of these recommendations actually work. This is not an unusual situation when it comes to policy proposals. For example, cultural district designation has been a very popular recommendation to encourage clustering, preserve cultural communities, spark innovation, and promote tourism. Studies can now compile dozens of examples from other studies recommending them to justify recommending them again. However, when social scientists examine the effect of cultural district designation with rigorous methods, they find no consistent effect, and often observe consequences directly contrary to the stated intentions of the policies[73]. Social life is complex, and unintended consequences of seemingly straightforward policy interventions are the rule[74].

73 Noonan, Douglas S. "How US cultural districts reshape neighbourhoods." Cultural Trends 22, no. 3-4 (2013): 203-212.

74 Calderón-Figueroa, Fernando A., Daniel Silver, and Olimpia Bidian. "The dilemmas of spatializing social issues." Socius 8 (2022): 23780231221103059.


Supercrawl Festival, Hamilton. Photo: Ivan Sorenson

With this in mind, a first set of recommendations concern moving the live music policy conversation in Ontario from ideation and capacity-building to evidence and evaluation:

1. **Create a Live Music Ecosystem Observatory (LMEO)** by partnering with industry stakeholders and universities. The foundation of policy evaluation is spatially fine-grained longitudinal data. Our report illustrates the potential of concert listing (e.g,. Exclaim! and Just Shows) and user-generated (e.g., Yelp) data. Establishing an ongoing partnership with event listing sites (e.g., Destination Toronto's comprehensive arts listings portal Now Playing Toronto) and other live music industry organizations would make it possible to "nowcast" the live music sector. This would provide near real-time observations of live music activity and perceptions at highly local levels going forward, plus a record of past activity. It would also help address some of the data limitations in charting live music trends we identified at the outset. An example is Brail et al.'s ongoing observations of the Toronto restaurant sector by repeatedly downloading data from Yelp[75]. To achieve the full potential of this sort of data, a similar project could be undertaken for music venues, over a larger area and in combination with other local amenities. Research Data Centres now make available extremely rich individual and business data based on annual tax filings; these could provide an unprecedented look into the detailed operations of the live music economy as a whole. If successful, this model could be extended to other arts disciplines.

2. **Evaluate the effectiveness of common recommendations.** The LMEO would allow stakeholders to evaluate the effectiveness of common past recommendations and their future implementation. Candidates include:

    a. **Music Office creation.** A handful of municipalities in Ontario and beyond have created Music Offices on the promise of issuing tangible benefits for musicians, audiences, and the broader community. Has this actually occurred? If this can be rigorously demonstrated, it would constitute a strong case for other municipalities to follow suit. This scope of this analysis would not be restricted to Ontario, but would ideally be global, with a view toward determining the extent to which factors such as the presence or absence of a Music Office, as well as their size (in terms of budget and personnel), organizational structure, and position within the city bureaucracy impact its effectiveness.

    b. **Agent of Change policies.** Many municipalities have adopted Agent of Change policies in order to preserve live music venues in areas experiencing residential growth, and to provide a pathway for live music venues to enter into previously residential areas. Has this been effective? Testing the effects of these policies could provide evidence as to whether they merit expansion to more cities and neighbourhoods. Similarly, the LMEO could track in real-time the impact of new Agent of Change policies.

    c. **Zoning and infrastructure changes.** A growing body of social science research examines the effect of changing zoning rules and building new infrastructure, such as transit stations. This research typically investigates the causal effects of such interventions on housing prices[76], new housing construction[77], and residential mobility patterns[78]. Little is known about the impact on cultural activity in general or live music in particular. Data in the LMEO could establish whether zoning reform or new transit construction consistently expand cultural vitality, and provide real-time updates about the consequences of new changes.

3. **Conduct formal cost benefit analyses to guide public expenditures on cultural infrastructure.** Cost benefit analysis (CBA) is a fundamental and flexible tool used by civil services to impartially evaluate proposed public expenditures[79]. For example, CBAs are often used to determine where there is sufficient unmet demand to justify constructing a public park. Common techniques include willingness-to-pay surveys[80] or hedonic price

75 "Restaurants." Toronto After the First Wave. Retrieved 2023. Available online: https://torontoafterthefirstwave.com/dashboards/restaurants/

76 Greenaway-McGrevy, Ryan, Gail Pacheco, and Kade Sorensen. "The effect of upzoning on house prices and redevelopment premiums in Auckland, New Zealand." *Urban studies* 58, no. 5 (2021): 959-976.

77 Freemark, Yonah. "Upzoning Chicago: Impacts of a zoning reform on property values and housing construction." *Urban affairs review* 56, no. 3 (2020): 758-789.

78 Nilsson, Isabelle, and Elizabeth Delmelle. "Transit investments and neighborhood change: On the likelihood of change." *Journal of Transport Geography* 66 (2018): 167-179.

79 Heath, Joseph. *The machinery of government: Public administration and the liberal state*. Oxford University Press, USA, 2020.

80 Price, Colin. "Cost–benefit analysis and willingness to pay for landscape." *Landscape Economics* (2017): 133-149.


Mixto Fest @ Lynx Music, Toronto. Photo: Joshua Best

methods[81]. Coupled with innovations such as the Stage Truck, these techniques could reveal promising sites for more permanent investment.

IMPLEMENTATION

Building a Live Music Ecosystem Observatory and using it to evaluate existing and future recommendations will place live music policy on a sound evidence base and further sectoral consensus around effective programs. At the same time, our review points toward four significant initiatives that could consolidate existing efforts into more effective platforms for supporting live music in Ontario and indeed in Canada as a whole.

1. **Build the Stage Truck — or a fleet of Stage Trucks — and make park event permitting easier in municipalities.** Cities such as Toronto have —for several years now — identified the need to create more arts programming, including live music, outside the traditional downtown cores where venues are mostly located. Our mapping of live music activity backs up the assertion that suburban neighbourhoods lack such options for live arts and entertainment within their own backyards, especially within Toronto and the GTHA. And change is slow to come.

81 Gjestland, Arnstein & McArthur, David Philip & Osland, Liv & Thorsen, Inge, 2014. "The suitability of hedonic models for cost-benefit analysis: Evidence from commuting flows," *Transportation Research Part A: Policy and Practice*, Elsevier, vol. 61(C), pages 136-151. Available online: https://core.ac.uk/download/pdf/6580343.pdf

The Stage Truck is a "shovel-ready" solution to this disparity. The feasibility study drafted by University of Toronto School of Cities students calculated that getting such a truck operational would require an estimated upfront investment of **$200,000**, plus annual operating costs of **$36,500-$43,500** (range adjusted for inflation in 2023). These are modest costs for a municipality to take on, and could be potentially funded through private sponsorships or business partnerships.

As many newcomer communities tend to settle in suburban areas, bringing live music and arts programming to these underserved areas will help further diversity and inclusion. Furthermore, these neighbourhoods are blessed with ample green space that could host festivals or events whose production the Stage Truck would make more cost-effective. Toronto Arts Foundation already runs a summer program of free programming called Arts in the Parks, wherein participating groups receive grants of $25,000 through a Toronto Arts Council program, Animating Toronto Parks, to produce an event in a designated park in the inner suburbs (e.g., Etobicoke, North York, or Scarborough). Access to the Stage Truck could allow producers to allocate more funding to artist fees, and make it more feasible for grassroots music presenters to participate in this program.

The Stage Truck would also help facilitate the Everywhere's a Venue idea across the province. With a small investment, municipalities from Windsor to


Bambii @ Geary Art Crawl, Toronto. Photo: Joshua Best

Hamilton to Ottawa to Sudbury could animate different corners of their cities, stimulating both economic and cultural vitality in these neighbourhoods through live music programming in parks, plazas, and parking lots. Larger festivals could also act as partners by renting the truck to provide a stage for local, emerging artists. Local BIAs could also pool resources to purchase a Stage Truck to service the province's many summer street festivals.

A complementary policy change that would make Stage Trucks more effective would be to liberalize and streamline permitting processes for events in public parks, as suggested in several aforementioned Ontario cities' music strategy documents. Toronto's park permit process, for example, is notoriously byzantine, and amplified music falls under the category of "Special Events," for which only non-profit or charitable organizations are eligible, with the exception of just 10 parks (out of the city's 1,500) that are approved for "Commercial Special Events."[82]

2. **Create a new provincial charitable organization: the Ontario Space for Music Foundation.** Our study shows a hunger for new operating models within the Ontario music ecosystem, though the new economic models, or resources required to cultivate these initiatives, remain elusive. The notion behind the Ontario Space for Music Foundation is to establish a centralized body that can provide both financial and operational support to a network of new spaces or platforms.

   Modelled on organizations like the Toronto Arts Foundation but operating at a provincial level, the OSMF could serve as a central clearing house to pursue philanthropic donations with a view toward preserving and expanding Ontario's grassroots music organizations. While major classical and high-art organizations already tap into considerable philanthropic support, the OSMF could work to cultivate relationships with financially successful Canadians whose tastes tend toward the independent and offbeat, and wish to preserve the ecosystem in which such music thrives.

   Many financially successful Ontarians, particularly members of Generation X, grew up on and in grassroots independent music venues. For them, this is their "classical" music. While they might not see much benefit in donating to a new symphony hall, supporting smaller venues and larger endeavours such as a Music Centre or Multidisciplinary Arts Centre could be an attractive proposition — if somebody asks, and in the right way.

   An OSMF, constituted as a charitable organization, could employ dedicated development staff with the core goal of cultivating and growing philanthropic giving to support innovative live music venue models in Ontario. Alternatively, it could be established as a division of an appropriate industry association.

   Rather than supporting one gleaming new hall in one city, as traditional company-driven arts fundraising has to date, the OSMF could support the development and management of a network of smaller, adaptively repurposed DIY spaces across the province. As the City of Toronto has set the example of donating municipally owned space to DIY groups such as the It's Ok* Studios, the OSMF could provide support to a network of such organizations to assist with the operational cost and management of these facilities. Or, it could assist in the establishment of a Cultural Land Trust that includes a music venue — or venues. The foundation could also work to ensure that old buildings are retrofitted to green standards of sustainability.

3. **Examine new funding models for live music, building on the success of pandemic recovery programs.** For some background, organizations such as FACTOR, the Foundation Assisting Canadian Talent on Recordings, have long played a crucial role in building the capacity of the domestic music industry by advancing the careers and livelihoods of Canadian recording artists.

   Created by a consortium of radio broadcasters, record producers, and music publishers, FACTOR, as the name suggests, has been primarily dedicated to supporting Canadian record production and music dissemination. FACTOR was founded in 1982 at a time when recording and production costs were high, studio time was scarce, music distribution was tightly controlled by a few labels and communication networks, space was affordable, and "gentrification" was a word known only to a few academics. It has grown the Canadian recorded

82 "Booking Special Events in Parks & Recreation Centres." City of Toronto. Retrieved 2023. Available online: https://www.toronto.ca/services-payments/venues-facilities-bookings/booking-park-recreation-facilities/special-events-permit-booking/

Terra Lightfoot @ Supercrawl Festival, Hamilton. Photo: Ivan Sorenson

music sector — with crucial support from the Department of Canadian Heritage — while providing significant opportunities for new and emerging artists, especially against the cultural power exerted by their southern neighbour.

This role remains critical well into the 21st century. At the same time, the economics of the music industry have changed considerably since the '80s. Recording and production costs have dramatically decreased, while physical distribution costs have fallen to historical lows. At the same time, touring and live music have become correspondingly more important and often more costly. While in the early days of the Internet, many observers heralded "the death of distance," in fact the opposite occurred[83]. The value of proximity increased as central city real estate prices dramatically grew worldwide, especially in culturally vibrant, amenity-rich areas. The pressures faced by live music venues in Toronto and other major cities are endemic to this global transformation, and thus, just as FACTOR emerged in response to broader market forces in 1982, the time is right to consider new funding models to respond to the present situation in which the greatest economic threats to Canadian music have to do with the costs of live music presentation.

Our suggestion is simple, but far-reaching: *Examine new funding models for live music, building on the success of pandemic recovery programs.*

During the pandemic, many previous ineligible entities were given the opportunity to access public funding for the first time thanks to the Canada Arts and Culture Recovery Program (CACRP)'s Support to Music Venues and Concert Promoters component, which in 2022–23 delivered $14 million via FACTOR and the Canada Music Fund (CMF). This was positioned as the for-profit sister program to the Department of Canadian Heritage's Canada Arts Presentation Fund aimed at non-profit and charitable organizations. The CACRP/FACTOR program's eligibility required that companies be Canadian owned/controlled, support the career development of Canadian artists, and pay fees and salaries to artists, technicians, and cultural workers. Venues were required to have permanent staging/ production, and minimums of 25% original music programing and 50% Canadian content.[84]

Our survey and interviews revealed how effective this funding was, with operators saying it not only "literally saved [their] business" but made their post-reopening 2022 one of their strongest years on record, while also offering artists and gig workers paid opportunities that helped rebuild careers.

Exactly what kind of programs would best meet this goal goes beyond the scope of this report. An example of an agency moving in this direction can be found in Quebec. Les SMAQ (*Les Scènes de Musique Alternatives du Quebec*), a coalition of 15–20 independent venues, successfully lobbied the provincial government to create a new funding program, administered through SODEC (Société de développement des entreprises culturelles) and offering $1M annually across the sector to help cover operating costs for venues, programming and travel costs, and the financial risks of supporting emerging artists. Though Quebec is a "distinct society" with its own culture and self-contained touring network for live music, the province's commitment to championing its homegrown culture is a model to examine in Ontario and the rest of Canada. Similarly, in the United States, the establishment of NIVA (National Independent Venues Association) during COVID-19 helped gain previously unheard-of government support for 148 independent venues across the USA.

4. **Advocate for a Cultural Renaissance 2.0.** Toronto's "Cultural Renaissance" refers to a set of ambitious cultural infrastructure projects undertaken in the early 2000s as part of Ontario's SuperBuild program[85]. Governments contributed over $250M to build or renovate major cultural venues such as the Royal Ontario Museum, the Art Gallery of Ontario, the Canadian Opera Company, the Royal Conservatory of Music, the National Ballet of Canada, and Roy Thomson Hall. This government investment sparked even higher levels of philanthropic support, justified on the grounds that developing these venues would increase tourism, stimulate economic

83 Silver, D. A., & Clark, T. N. (2016). *Scenescapes: How qualities of place shape social life.* University of Chicago Press.

84 "Support to Music Venues and Concert Promoters (via Canada Arts and Culture Recovery Program, CACRP) Program Guidelines, Glossary, and FAQ." FACTOR. June 27, 2022. Available online: https://factorportalprod.blob.core.windows.net/portal/Documents/Emergency_Support_Fund/Support%20for%20Venues%20and%20Promoters/FACTOR_Support_to_Music_Venues_and_Concert_Promoters_CACRP_Program_Guidelines.pdf

85 Jenkins, Barbara. "Toronto's cultural renaissance." *Canadian Journal of Communication* 30, no. 2 (2005): 169-186.

development, and serve as iconic landmarks to anchor Toronto's status as a world-class city. The Cultural Renaissance has left a lasting mark on the city and province. Along with the City's ongoing funding commitment to operating costs for many of these high arts organizations (over $8 million in 2019), the Cultural Renaissance[86] represented the consolidation and realization of a vision of Toronto as a "cultural Camelot."[87]

While this vision of iconic architecture and high culture may have had an important place in Toronto's ascent up the global urban hierarchy, nearly a generation has passed since the Cultural Renaissance.

It is time for a new renaissance for a new generation. Cultural Renaissance 2.0 would democratize cultural infrastructure.

If Cultural Renaissance 1.0 was defined by large iconic architecture by starchitects, Cultural Renaissance 2.0 would be defined by repurposing and animating existing spaces, or integrating culture into new mixed-use projects. If Cultural Renaissance 1.0 was geared toward attracting international tourism, Cultural Renaissance 2.0 would encourage residents to explore their own cities and discover the variety of distinctive local cultural scenes it has to offer — even as it provides tourists with unique neighbourhood- and street-level experiences that differ from the standardized fare of major cultural attractions. If Cultural Renaissance 1.0 infused the traditional high European arts with new energy and resources, Cultural Renaissance 2.0 would give voice to independent, popular, diverse, and emerging artists, genres and traditions that have been traditionally marginalized by cultural infrastructure spending — particularly cultural scenes driven by Ontario's many vibrant immigrant communities, Indigenous artists and people of colour.

Under the banner of Cultural Renaissance 2.0, many of the specific ideas contained in the many arts policy plans could be joined in a more ambitious and integrated vision of a dynamic cultural ecosystem. Equally important would be the possibility of a galvanizing agenda to unite distinct stakeholders — including political leaders, governments, cultural producers, and philanthropists — around a common objective. Just as federal and provincial governments led the way in the early 2000s with major infrastructure investments, there is a chance now to move the ongoing cultural renaissance in Ontario to a new and more democratic level. Cultural Renaissance 2.0 will take place not in our museums or opera houses, but in the grassroots community spaces where emerging artists take their first crucial steps onto the stage.

Haviah Mighty @ Wavelength Winter Festival, Longboat Hall, Toronto.
Photo: Kate Mulvale

Oh, and don't forget to support your local music venues, attend shows by emerging artists, and buy merch!
As much as the Ontario music community may wish our cities and province would do more to support our venues and artists, change does lie within. The City is either an obstacle or a conduit to a healthier music ecosystem, but the DIY spirit is ultimately one of self-organization. There is no substitute for buying tickets to attend concerts at small and grassroots music venues, supporting local, emerging artists and presenters, and buying merch directly from our artists and arts workers. We have to dream bigger, but we also have to step up to make things happen. Join a Board, pitch in, and vote with your dollars. The future of music venues starts with us.

86 Williams, Mike. "Major Cultural Organizations - 2019 Grant Allocations." City of Toronto. Available online: https://www.toronto.ca/legdocs/mmis/2019/ec/bgrd/backgroundfile-132992.pdf

87 Goldberg-Miller, Shoshanah BD. *Planning for a city of culture: Creative urbanism in Toronto and New York*. Taylor & Francis, 2017.

SETTING THE SCENE, CONTINUED:

FIELD REPORTS FROM ONTARIO'S MUSIC CITIES

An in-depth look at our six Ontario music cities from our Setting the Scene section.

Photo: Conor Samuel

TORONTO

Brief Musical History: Canada's biggest city and Ontario's capital, Toronto is the nation's New York but with the sprawling scale and Great Lakes geography of Chicago — though its longtime rival for #1 status, Montreal, may take issue with "the Big Smoke" being viewed as the more cosmopolitan metropolis. Today a global finance and tech hub, Toronto's media and entertainment industries are very strong, particularly film and television production. But music is arguably Toronto's cultural export with the biggest international impact: it's home to two of the world's biggest pop artists, Drake and the Weeknd.

Toronto's homegrown, original music scene goes back to the jazz age of the '30s, and its proximity to the US border allowed early rock'n'roll and R&B to spread north in the '50s, supported by a string of nightclubs along Yonge Street. In the '60s, Yorkville Village was home to a vibrant folk coffeehouse counterculture scene, while members of the Afro-Caribbean diaspora launched the first Caribana festival. Canadian folk-rock icons Joni Mitchell and Neil Young spent time in Toronto before departing for the US. But the city's development-crazed bureaucrats have not had a good track record for supporting grassroots culture, and Yorkville was razed to become an upscale shopping district.

The '70s saw the evolution of reggae, punk and new wave scenes supported by small venues along Queen Street West and the nearby warehouse district, which became grounds zero for the city's burgeoning indie, roots, and electronic music scenes. Canadian hip-hop, meanwhile, was nurtured at the Concert Hall on Yonge Street. But Toronto didn't really develop much of a "cool factor" internationally until the indie music explosion of the 2000s, when the Internet propelled bands like Broken Social Scene onto worldwide stages, followed by rapper/singer Drake's breakout US chart success in 2010. Today, in spite of the ongoing pandemic and a raging affordability crisis — the city is in the top 10 *least* affordable cities globally, according to Demographia[88] — Toronto is still home to 18,000+ music-makers[89].

TORONTO /2.8M Population: 2,794,356 (2021 census)

Number of music venues

Number of Music Venues: 329 (via Exclaim!)
Number of Shows Annually: 3,465 (via Exclaim!)
[8.5K ppl / venue, 806 ppl / show]

Selected Musical Exports

Robbie Robertson (the Band), Rush, Martha and the Muffins, Cowboy Junkies, Barenaked Ladies, the Sadies, Broken Social Scene, F***ed Up, K'naan, Drake, the Weeknd, Zeds Dead, PUP, July Talk, Haviah Mighty, The Weather Station

Notable Arts Institutions

Art Gallery of Ontario, Royal Ontario Museum, Toronto International Film Festival, Canadian Opera Company, Harbourfront Centre, Massey Hall, Toronto Caribbean Carnival (f.k.a. Caribana), Pride Toronto, Luminato, R.I.S.E. Edutainment, Small World Music

Educational Institutions

The University of Toronto, York University, Toronto Metropolitan University, OCAD University, Centennial College, George Brown College, Humber College, Seneca College, The Royal Conservatory of Music

Survey results

- ↑ More interested in hearing new music at venues
- ↑ Also high interest in venues preserving local culture and neighbourhood vitality
- ↑ Higher perception of venues as under threat
- ↓ Lowest perception of venues as physically accessible
- ↑ Highest interest in privately owned non-traditional venues (stores, galleries) and outdoor spaces (parking lots)

Top issue for artists

Expectation of draw

Top issues for audiences

$$$ High ticket prices

Top issues for operators

Rent increases, rising insurance costs, noise complaints

Top alternative venue models

Music centre, community land trusts

88 Urban Reform Institute and Frontier Centre for Public Policy. "Demographia International Housing Affordability." 2022 edition. Pg. 15. Available online: http://www.demographia.com/dhi.pdf

89 Nordicity and City of Toronto Music Office. *Music Industry Strategy: 2022 - 2026*. 2022. Pg. 11. Available online: https://www.toronto.ca/wp-content/uploads/2022/07/8e4e-Toronto-Music-Industry-Strategy-2022-2026.pdf

The geography of live music venues in downtown Toronto (Exclaim) *Map 1*

☛ *Note: Maps 1-8 show the geography of live music venues in Toronto, among shows listed on Just Shows and Exclaim. Maps with equal size points indicate the presence of a venue at that point. Maps where the bubble sizes vary show the where more or less shows occur, with the bubble size corresponding to the number of shows at that location.*

The geography of live music shows in downtown Toronto (Exclaim) *Map 2*

Musical Geography: Toronto has somewhere between 200–500 music venues, according to various sources, and despite the vast area of the amalgamated megacity, the majority of its concert activity is located downtown, with the inner suburbs comparatively starved for entertainment options. Looking closer, as in Maps 1-4, venues are overwhelmingly clustered in the west end following the east-west grid pattern of major streets Bloor, College, Dundas, and Queen, all served by subway or streetcar lines[90]. 84% of Toronto venues and shows were located in the west end, according to Just Shows data, and 76% of venues and 84% of shows via Exclaim!

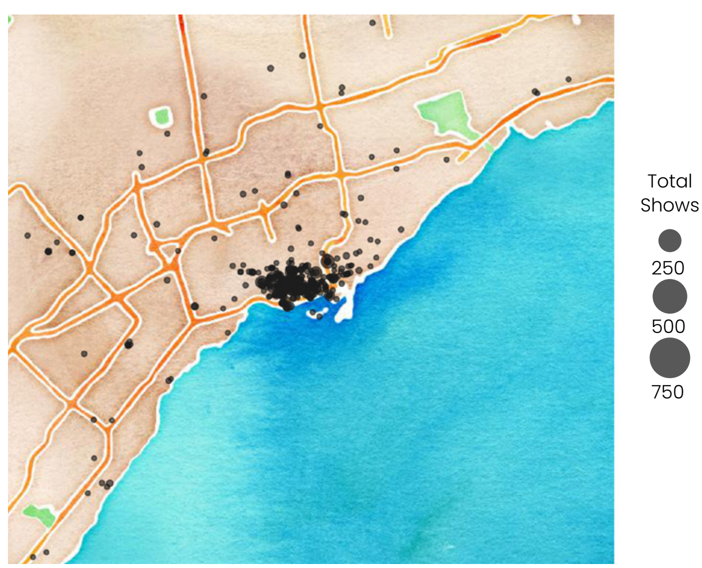
The reasons for this western concentration are mostly historical: Starting in the '70s, cultural attractors such as the Ontario College of Art (now OCAD University), the University of Toronto, Kensington Market/Chinatown and the warehouse spaces of the Garment District drew artists and venues to settle west of University Avenue. Today, the walkable, bikeable expanse of west-end Toronto easily connects neighbourhoods, enabling an uninterrupted network of venues from the Horseshoe Tavern on Queen West to Lee's Palace in the Annex to the Axis Club in Little Italy to Lula Lounge in Little Portugal.

The equally walkable east end of the old City of Toronto is no live music desert, but still sees far fewer entertainment options, with its two largest venues, the Danforth Music Hall and the Opera House, hugging the western banks of the Don River. But outside the core, dedicated music venues become

90 And following the tight constraints of commercial zoning, which keep venues out of Toronto's infamous "yellow belt" that places single-family houses on the doorstep of bustling entertainment strips.

The geography of live music shows in Toronto (Exclaim) *Map 3*

The geography of live music shows in Toronto (Exclaim) *Map 4*



Map 5

The geography of live music shows in downtown Toronto (Just Shows)

Map 6

The geography of live music shows in downtown Toronto (Just Shows)

scarce and scattered. This divide between the downtown core and the inner suburbs of Etobicoke, North York, and Scarborough, as well as the surrounding cities of "the 905" (e.g., Brampton, Markham, Mississauga, or Whitby) overlaps with a lack of cultural infrastructure, including live music venues; these cities are less walkable, more car-centric, and more poorly served by public transit and other amenities. Zoning is another factor: nightclub licences are not permitted outside the downtown core.

Survey results: As the biggest city in Ontario, Toronto has big-city concerns: its venue operators were most worried about rising rents, insurance premiums, and noise complaints — issues that were not experienced to the same degree in other jurisdictions (except for Hamilton, where insurance was a shared concern). Noise conflicts are unsurprising given the degree of residential development and infill in Toronto. Toronto operators were also the least concerned about shrinking audiences (18% listed shrinking audiences as a top concern, though it was the top priority elsewhere) though this may have been a factor of a larger population combined with worries about other more existential threats. Across the board, Toronto's music community values venues as places to hear new music, as well as sources of vitality and cultural preservation.

Artists and presenters both identified expectation of draw, and lack of financial compensation, as their top barriers, reflective of both metropolitan challenges (competition for audience attention and cost-of-living anxieties) and the historical dominance of the bar model. Though still a high concern, Toronto artists are comparatively *less* concerned about poor compensation than artists in other cities, indicating that some Toronto acts are just happy to have a place to play. Audiences were most put off by high ticket prices, again reflective of the disjunct between economic expectations of performers and attendees.

In terms of venue models, Toronto stands out with the highest interest in private outdoor spaces such as parking lots or commercial squares, likely reflective of the city's comparative surplus of such sites. Toronto was the most interested in seeing the development of a music centre, a logical outcome of big-city specialization, but also reflective of the city's recent rehearsal-space crisis. Toronto respondents also showed the most interest in community land trust models — likely the result of more education and awareness of the phenomenon and local successes in Parkdale and Kensington Market — as well as overall rent pressure. Toronto showed low interest in mobile stages, likely because most respondents were located downtown, where venue access is relatively plentiful.

Diversity, Strength to Strength: It is said that Toronto is one of the world's most culturally diverse cities, and in a Canadian context, 2021 census data indicates this to be true. Over 55% of Toronto's population is either a visible minority or a person born outside of Canada. Both figures are more than double the national average, and close to double the provincial average. In surrounding 905 suburbs such as Brampton, with its large South Asian community, the racialized population is closer to 80%.

It's impossible to sum up such a large, vibrant and diverse city as Toronto, but to choose just a few examples, the city's music scene shows the influence of the Caribbean communities in its hip-hop and reggae sound; it boasts a vibrant Latin music scene supported by Brazilian and Portuguese populations; and a large Filipino community is well represented in the city's indie and electronic music scenes. Organizations such as Small World Music, Batuki Music, BLOK and the Aga Khan Museum support a stunning range of global musics.

And like any big city, Toronto's live music scene runs the gamut from major classical, opera and jazz institutions to numerous clubs booking folk, hip-hop, indie, metal, punk, R&B, rock, and beyond. The city's electronic music scene has sadly mostly been driven out of the Entertainment District's clubs but still thrives at major EDM festivals, community events like Promise, a vibrant "renegade rave" scene of quasi-legal park and warehouse parties, and a few long-running clubs such as Bambi's. And a range of DIY and non-profit presenters — including Burn Down the Capital, It's Ok*, Long Winter, the Music Gallery, Not Dead Yet, R.I.S.E. Edutainment, the Tranzac, Uma Nota Culture, Venus Fest and Wavelength — support the music community's more underground or experimental edge in non-traditional and all-ages venues.

Downtown/Suburban Divide: As our mapping data shows, Toronto sees a major divide in the availability of, and access to, live music and performance infrastructure between downtown (or the "old City of Toronto") and less-dense surrounding areas. This is not to say that culture is non-existent in the inner suburbs; far from it. For example, Scarborough, the largest former Toronto borough by area, has exported many of the city's best-known artists, including the Weeknd, Kardinal Offishall, and Barenaked Ladies. But in terms of existing venues, they are more spread out, without the concentration seen in the core. Residents may have become accustomed to traveling downtown to attend concerts, festivals, or other events rather than expecting to experience them in their own backyards. Though that may be changing. In the summer of 2021, the Beaches Jazz Festival hosted a series of drive-in concerts in the parking lot of Guildwood train station, GO Transit's commuter hub in East Scarborough. R.I.S.E. Edutainment also animated the area around Scarborough Town Centre for Nuit Blanche 2018 with a live event installation.

Nurturing more opportunities for live performances and other cultural activities in the inner suburbs is a priority for the City. Though music is not explicitly a part of its mandate, the Clark Centre for the Arts (which opened in 2022) is a new City-run "cultural facility that houses specialized art studios and gallery spaces" in the bucolic location of Guild Park and Gardens.

Concern about uneven geographic distribution of all manner of cultural activity has grown in recent decades as Toronto's inner suburbs have become home to the large majority of its recent immigrants, who mostly hail from non-European regions (especially East Asia, South Asia, the Middle East, West Africa, and the Caribbean). While the city's downtown core has experienced rapid economic growth, areas outside the core have grown more slowly. Along with divergent economic, demographic, and cultural trajectories, the core vs. the suburbs has become perhaps Toronto's most salient political divide[91]. In response to these transformations, a major goal of municipal cultural policy has been to bridge these divides to create more opportunities for cultural activities outside the core, and to foster more connections across the city's diverse communities and neighbourhoods.

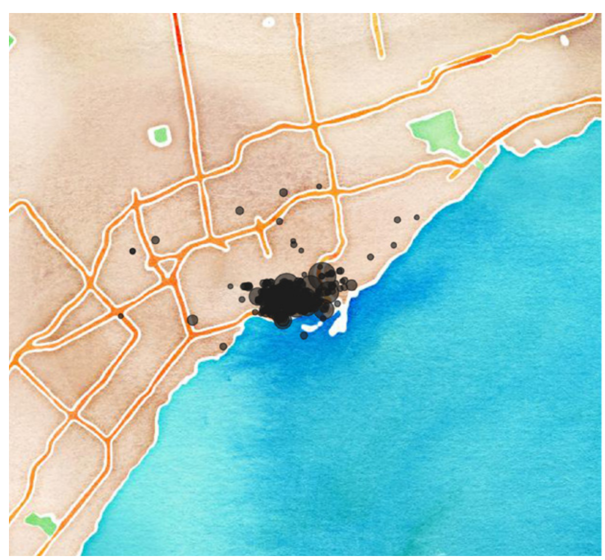
91 Doering, Jan, Daniel Silver, and Zack Taylor. "The spatial articulation of urban political cleavages." *Urban Affairs Review* 57.4 (2021): 911-951.

The geography of live music venues in downtown Toronto (Just Shows) *Map 7*

Spruced-up venues: Though the closure of several beloved venues and community spaces due to pre-COVID gentrification (the Silver Dollar Room/Comfort Zone, Holy Oak, the Hoxton, the Central) and during pandemic lockdowns (Orbit Room, the Boat, ROUND venue, Club 120) was cause for upset and anxiety, the last two years has also seen new venues open or reopen in new and improved incarnations. The fall 2021 lifting of capacity restrictions[92] coincided with a handful of multi-million dollar openings and reopenings: the two-floor El Mocambo club, legendary for hosting the Rolling Stones in 1977, now under the ownership of *Dragons' Den* alum Michael Wekerle; History, a collaboration between multinational promoters Live Nation and Toronto music icon Drake, taking over a former off-track betting facility in the east

92 Robertson, Becky. "Capacity limits finally lifted further for events in Ontario." *BlogTO*. Oct. 28, 2021. Available online: https://www.blogto.com/city/2021/10/capacity-limits-finally-lifted-further-ontario-events/

The geography of live music shows in Toronto (Just Shows) *Map 8*



Bangerz Brass @ Mixto Festival, Lynx Music, Toronto. Photo: Joshua Best

end and, with a capacity of 2,553[93], filling a much-needed niche in the local venue infrastructure; legendary Massey Hall, lovingly restored and now part of a larger, state-of-the-art complex, the Allied Music Centre, which will contain two additional, smaller performance spaces (see profile pg. 50); and the Mod Club Theatre, previously a worrisome victim of the pandemic now reborn as the Axis Club.

As exciting as these new or renewed spaces are, they are mostly larger rooms with corporate or institutional backing. Smaller stages for local or emerging artists have seen a net loss. Some artists and presenters have been quoted costly venue rental rates or facility fees for usage. Though this is understandable, as venues have been hard-hit by the pandemic, cost is a legitimate barrier to access.

City Hall reported that "approximately 15% of Toronto's venues permanently closed in 2020-21," according to the 2022 Toronto Music Industry Strategy. Finding reliable DIY venue spaces is more challenging than ever. Some venues and presenters shared that post-reopening attendance has been very inconsistent, while others reported that 2022 was one of their busiest years ever.

Meanwhile, other spaces are in the process of opening to create opportunities for historically underrepresented communities. Currently under renovation in Oakwood-Vaughan Village, south of Little Jamaica, the Nia Centre for the Arts will be a multidisciplinary centre for Black artists that will contain an intimate, 160-seat flexible performance space. And in Mirvish Village at Bathurst and Bloor, the Blackhurst Cultural Centre will be a multi-arts hub that will also contain a presentation space. The Wildseed Centre for Art & Activism, meanwhile, is located in a Victorian house on Cecil Street that was purchased in 2021 by Black Lives Matter Canada[94] and will be available for rentals to community groups for events. A third creative space driven by members of the Black community, It's Ok* Studios, opened in late 2022, and is profiled below.

We're Not Austin — 10 Years of "Music City": In October 2013, Toronto's controversial then-Mayor Rob Ford, made headlines for his trade mission to Austin, Texas. Ford was part of a 17-person delegation from Toronto, which also included city councillors and music industry leaders[95], to the Texan state capital, which brands itself "the Live Music Capital of the World[96]." Ford's photo-op with the Mayor of Austin marked the signing of the Austin-Toronto Music City Alliance[97].

The occasion focused attention on municipal efforts within Toronto to recognize and support its music industry — especially championing the cause of "commercial music" rather than high-art genres such as classical or opera, which had historically been privileged by funding bodies and city culture divisions. That year also saw the launch of a campaign to brand Toronto as a "Music City" in conjunction with the establishment of the Toronto Music Industry Advisory Committee — an all-volunteer body consisting of industry representatives from across the sector, led by passionate music advocate and then-Councillor, Josh Colle — as well as the establishment of the City's first Music Office and the hiring of Music Sector Development Officer Mike Tanner.

Toronto was ahead of the curve in terms of taking music seriously at a policy level, and many other municipalities have

93 Trapunski, Richard. "Inside Drake and Live Nation's Toronto music venue History." *Now Magazine*. Nov. 8, 2021. Available online: https://nowtoronto.com/music/inside-drake-and-live-nation-toronto-music-venue-history/

94 Adams, Kelsey. "Black Lives Matter to open 10,000-square-foot community hub in Toronto." *Now Magazine*. July 8, 2021. Available online: https://nowtoronto.com/culture/art-and-design/black-lives-matter-to-open-10000-square-foot-community-hub-in-toronto/

95 Star Staff. "'Controversial' Mayor Rob Ford welcomed to Austin, Texas." *The Toronto Star*. Oct. 2, 2013. Available online: https://www.thestar.com/news/gta/2013/10/02/controversial_mayor_rob_ford_welcomed_to_austin_texas.html

96 "Live Music Capital of the World." Austin Relocation Guide. Retrieved 2023. Available online: https://austinrelocationguide.com/live-music-capital-of-the-world/

97 "Austin-Toronto Music City Alliance." City of Austin. 2018–19. Available online: https://www.austintexas.gov/department/austin-toronto-music-city-alliance

since followed suit. Intended to act as a conduit between the music community and City Hall, the Music Office now consists of two full-time staff members. In 2023, its various initiatives include: an online Toronto Music Directory; paid performance series including City Hall Live; and links to various other resources. Some victories for the office include the 2019 overhaul of the city's Noise Bylaw, the 2020 extension of a property tax exemption for creative hubs to include live music venues, and the 2022 opening of It's Ok* Studios in a city-owned building.

The Music Office also commissioned various studies, including

TORONTO PRESENTER/VENUE PROFILE: IT'S OK* STUDIO

It's Ok* certainly stepped into the ring: The Black-led, non-profit concert series kicked off in 2018 with a show in a boxing gym. Iconic west-end institution Sully's was transformed into a concert venue for one night, with performances by hip-hop artists and local DJs. Co-founded by Said Yassin and Alicia Bee, It's Ok* immediately established a rep for some of the most imaginative DIY shows in the city.

Part of their ethos involves using "a space that's nontraditional, that isn't used for putting on music performances," according to It's Ok* Board chair Chris Wilson. "The other side is being exposed to the city. A lot of the [places] that we would typically go to see a performance are in these same neighbourhoods within Toronto."

Beyond the goals of transforming spaces and experiencing different parts of the city, another aim of It's Ok* was to create a safe and welcoming space for Black people to enjoy diverse genres of live music. "When you look at rock music or jazz or classical, traditionally the spaces where you see these genres of music are not ones frequented by or supportive of the Black community," says Wilson.

During the pandemic, the opportunity arose for It's Ok* to create their own space, one where they could make a home not just for music but a wide range of multidisciplinary artists and creatives. It's Ok* Studios came out of a unique partnership with the City of Toronto. The Music Office became aware of a City-owned property at 468 Queen Street West, slated for demolition a few years down the road. The commercial building was until recently home to a sneaker shop. The laneway and parking lot behind it are slated for redevelopment, with a long-term plan for new affordable housing, a park and cultural venue[99].

The short-to-mid-term plan was hatched for It's Ok* to occupy the two-floor, 10,000 ft^2 space for two years, until the building meets the wrecking ball. In addition to hosting live performances, It's Ok* Studio will also function as a co-working, exhibition and studio space.

Though the space is still undergoing some upgrades, the first events took place there in the summer and fall of 2022.

Non-profit Venus Fest demonstrated the immense potential of the space by using the second floor for an art exhibition and "restorative zone,"[100] while concerts took place on the ground floor. The main level is also fully accessible, including the washrooms.

Wilson anticipates the majority of the space's programming will come from the community alongside It's Ok*'s own events. But an important objective for the collective is to keep costs accessible for space users — if not entirely non-existent. "We want to make sure that we find ways outside of having to charge the community for us to be able to keep the doors and keep the lights on, that's a part of that business model," says Wilson. While they envision brand partnerships may help underwrite community access, they already have a big step up in the unique deal they have struck with the City.

As a non-profit, the organization can occupy the City-owned space at well below market cost. It's an innovative arrangement that gives It's Ok* the freedom to program or activate the space with creativity first. "It's huge," says Wilson. "It definitely wouldn't be something that would be feasible if we were renting it from a landlord."

It's Ok* are hoping to be able to stay longer than their planned two-year tenancy. After all the heartbreaking closures of small venues before and since COVID, it's a welcome feeling to be optimistic that this "proof of concept" may be applied to other City of Toronto properties. And for Wilson and Yassin, that's something they want to see happen in every corner of the city.

99 CBC News. "Toronto could turn a vacant downtown building into a new live music venue." March 15, 2022. Available online: https://www.cbc.ca/news/canada/toronto/toronto-queen-street-west-building-new-music-venue-1.6386116

100 Brasil, Sydney. "Vagabon, Austra, Hannah Georgas Headline Venus Fest 2022." *Exclaim!*. July 26, 2022. Available online: https://exclaim.ca/music/article/vagabon_austra_and_hannah_georgas_set_to_headline_venus_fest_2022

two recently conducted by the firm Nordicity: the 2020 *Re:Venues* report, and a five-year Music Industry Strategy plan that updates the 2016 Music Strategy to cover 2022–26. The results were aligned with many of the findings of this study, particularly with regard to the challenges and opportunities around "spaces to practice and perform[98]." The new Music Strategy was released in March 2022 to little fanfare, though an official launch may still yet take place.

The 2022 strategy document did not mention the Austin–Toronto Music City Alliance. This was a key decision as, in many ways, the initial alliance only highlighted the differences between Toronto and Austin: though both cities are (or were) packed with live music venues, Toronto is larger, more diverse, and more successful in exporting homegrown artists, but also lacks major signature festivals such as SXSW or Austin City Limits and a warm climate that permits year-round outdoor events. Ten years after trying on the mantle of Music City, and more than a half-century after Yorkville and Caribana made it a global music mecca, Toronto is still in the process of finding itself. And that's not a bad place to be.

98 Nordicity and City of Toronto Music Office. *Music Industry Strategy: 2022 - 2026.* 2022. Pg. 29. Available online: https://www.toronto.ca/wp-content/uploads/2022/07/8e4e-Toronto-Music-Industry-Strategy-2022-2026.pdf

Toronto - The Silver Dollar Room.
Photo: Ansaf Ahmad

CAUTIONARY TALE: PRESERVATION AT ANY COST — THE SAGA OF THE SILVER DOLLAR ROOM

A commonly cited example of the destruction of cultural heritage within the Toronto music community was the 2017 closure of the Silver Dollar Room and its often-forgotten downstairs neighbour, the Comfort Zone. The long-running clubs, located near Kensington Market, Chinatown and the University of Toronto, were housed in a building that was slated to be torn down for a high-rise student residence. The City of Toronto intervened, designating the club as "being of cultural heritage value or interest[101]."

The developers were then required to preserve the elements of the Silver Dollar that were actually protected by the Ontario Heritage Act: not just its physical features like its sign, bar, murals, but also the location's status as an "entertainment venue" named the Silver Dollar Room. (The Comfort Zone, which mostly programmed after-hours raves and EDM parties, was not deemed worthy of preserving.) There was no requirement that it book live bands playing the dirty blues or gritty rock'n'roll "the Dollar" was known for, and no way to enforce such an intangible element. To their credit, Toronto City Council did everything in its power to save the club within the limitations of the provincial legislation.

Forced to include all these elements in the name of cultural heritage, the developers gutted the Silver Dollar and rebuilt it. At the end of 2022, the club sat empty, its landlords still seeking an operator, the space an eerie facsimile of the club's memory. Its 156-person size is a dauntingly low capacity to create a viable business model based on bar sales.

This story is an example of how attempting to preserve the past — however well-intentioned — does not always safeguard the future. It is sad the Silver Dollar and the Comfort Zone are gone. (Though a new Comfort Zone location did open in Parkdale in 2020[102].) Could it have been a win-win to keep both alive and provide much-needed housing? Yes. Could the intervention have gone much further and set up both businesses to not just survive but thrive? Definitely maybe.

101 Rayner, Ben. "Silver Dollar Room Set to Close in Spring." *The Toronto Star.* Jan. 31, 2017. Available online: https://www.thestar.com/entertainment/music/2017/01/31/silver-dollar-room-set-to-close-in-the-spring.html/

102 Robertson, Becky. "Notorious after-hours club The Comfort Zone is reopening in Toronto." *BlogTO*. March 3, 2020. Available online: https://www.blogto.com/eat_drink/2020/03/torontos-favourite-after-hours-club-has-returned/


Photo: Adrien Delforge

OTTAWA

Brief musical history: Due to its status as the nation's capital, Ottawa is often overlooked as a city per se — nonetheless, it's Ontario's second-largest metropolis, and Canada's sixth-largest. But capital privileges do have their benefits: the city is awash in publicly funded infrastructure, and its bilingual character — due to both the presence of the civil service and the inclusion of Gatineau/Hull, QC, within its urban area — set it apart from the rest of the province. Still, Ottawa has a long history of a brain drain to the larger, more cosmopolitan centres of Toronto and Montreal, and this is especially true in the music scene — everyone from folk pioneer Bruce Cockburn to members of indie icons Arcade Fire and METZ came up in Ottawa before decamping to the 416 or 514.

In the mid-'90s, Ottawa developed a short-lived yet vital, politicized DIY post-hardcore scene via spaces like 5 Arlington. The 2010s saw Ottawa experience a cultural renaissance through local-centric festivals such as Arboretum and Megaphono, while Indigenous EDM icons the Halluci Nation (f.k.a. A Tribe Called Red) have maintained the city as a home base. Ottawa's music scene currently benefits from non-profit presenters with a strong equity focus, such as Debaser, Timekode, and House of PainT, as well as community builders who have deftly navigated collaborations with public institutions.

Musical geography: Ottawa's network of live music venues is the most distributed of any major city in Ontario, indicating it is well-served by public transit, belying the bad reputation of OC Transpo. It is also strongly neighbourhood-based: Though the biggest venue cluster is around the touristy downtown and ByWard Market (National Arts Centre, Club SAW, LIVE! on Elgin), there are also key nodes in Centretown (Barrymore's, Babylon), Chinatown/Centretown West (Bronson Centre, GigSpace), and the Glebe / Old Ottawa South (House of TARG, Irene's Pub, Redbird Live) — the last of which is a 45-minute walk from downtown.

OTTAWA /1.0M Population: 1,017,449 (2021 census)

Number of music venues

Number of Music Venues: 173 (via Exclaim!)
Number of Shows Annually: 713 (via Exclaim!)
[5.9K ppl / venue, 1,426 ppl / show]

Selected Musical Exports

Selected Musical Exports: Paul Anka, Bruce Cockburn, Alanis Morissette, Shotmaker, Kathleen Edwards, the Acorn, Keshia Chanté, the Halluci Nation

Notable Arts Institutions

National Gallery of Canada, National Arts Centre, RBC Bluesfest, Winterlude, Arts Court

Educational Institutions

Carleton University, the University of Ottawa, Algonquin College, la Cité collégiale

Survey results

- ↑ More interested in vitality venues bring to neighbourhoods
- ↓ Lower relative perception of venues as under threat
- ↑ Highest perception of venues as reflecting diversity

Top issue for artists

Top issues for artists: Lack of financial compensation, expectation of draw

Top issues for audiences

Not hearing preferred styles of music, COVID-19

Top issues for operators

Shrinking audiences

Top alternative venue models

Multi arts centres, public parks programs

Highest interest in publicly owned non-traditional venues (eg. libraries, museums)

More interest in private business partnerships

There are also key venues in neighbouring suburbs and small towns, such as Greenfield's Public House in Nepean and the Black Sheep Inn in Wakefield, QC. Perhaps because Ottawa is a government town with a high population of public servants (20.1%), residents are more likely to commute to work downtown by day and go out at night in their own backyard.

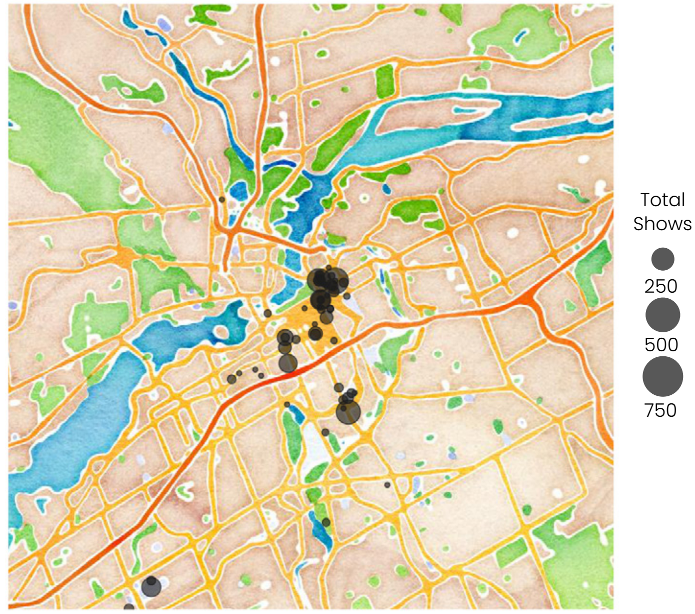
Survey results: Ottawan stakeholder opinions about live music also appear to be significantly distinct from the rest of the province. Backing up the mapping data, respondents valued the vitality that music venues bring to their neighbourhoods more than elsewhere, and also most felt its stages reflected its diversity. Ottawa artists and presenters are very engaged with equity issues, and across the province identified barriers such as low compensation or lack of all-ages shows the highest. This may be related to the progressive political bent of its artistic community. These concerns are not as strongly shared by Ottawa audiences, indicating a potential disconnect between showgoers and

The geography of live music venues in Ottawa (Exclaim) *Map 9*

Note: Maps 9-12 show the geography of live music venues in Ottawa, among shows listed on Just Shows and Exclaim. Maps with equal size points indicate the presence of a venue at that point. Maps where the bubble sizes vary show the where more or less shows occur, with the bubble size corresponding to the number of shows at that location.

artists/organizers. Yet, Ottawa audiences' top barrier is the concept of not finding their taste represented in local bookings, which is shared more highly as a concern by Ottawa artists than elsewhere. This alignment may reflect the fact that Ottawa is sometimes overlooked as a tour stop by international artists, in spite of its size and proximity to itinerary fixtures such as Toronto and Montreal.

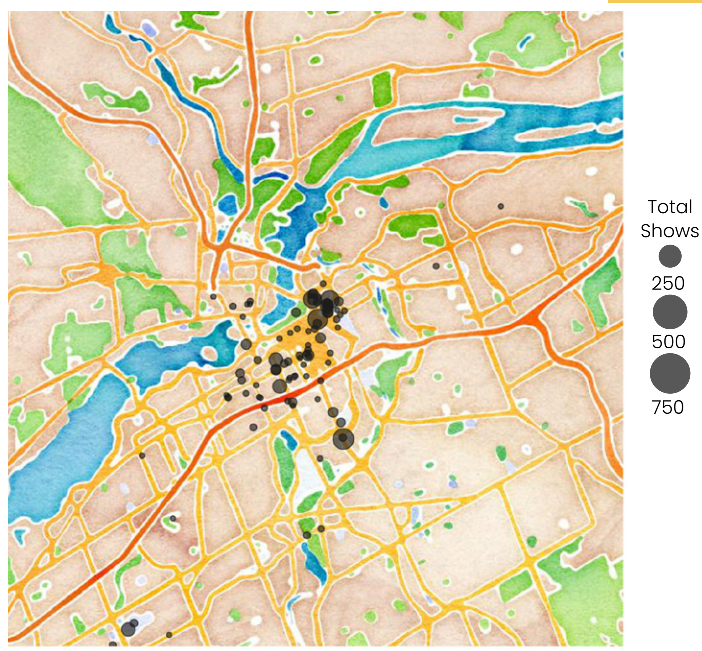
The geography of live music shows in Ottawa (Exclaim) *Map 10*



In terms of venue models, Ottawa was most enthusiastic about seeing events in publicly owned DIY/non-traditional spaces (e.g., community centres, libraries, museums), perhaps related to the success of public (or publicly funded) institutions. Along with Toronto, Ottawa was also the most interested in privately owned DIY/non-traditional spaces (e.g., stores, churches, galleries). The Ottawa community was also the most open to private business partnerships, such as venues sharing space with microbreweries or tech companies, displaying a sense of entrepreneurship. The city's most popular new venue model was a multi-arts centre, indicative of the success of existing facilities such as Arts Court. Ottawa was also the least likely to perceive its venues as being endangered, indicative of the comparative health

The geography of live music venues in Ottawa (Just Shows) *Map 11*

The geography of live music shows in Ottawa (Just Shows) *Map 12*



Kaspien @ City Sounds, Lansdowne Park, Ottawa. Photo: Quest

of its existing venue network. Ottawa respondents showed the lowest interest in mobile stages, possibly because of this convenient access to venues embedded in neighbourhoods.

Interview findings: Field research in the summer of 2022 included interviews with artists, institutional presenters and curators, and media and music industry association representatives. The following themes emerged from these discussions:

Importance of arts-and-artist-driven institutions: Club SAW, Arts Court and its quarterly art party Pique were universally acclaimed by stakeholders. Though some long-running clubs such as Avant-Garde Bar and the Dominion Tavern have survived the pandemic, Club SAW was identified as one of the most vibrant and active venues in the city. The small, multipurpose venue is run by SAW Gallery, a long-running Artist-Run Centre founded in 1973. SAW is a part of the Arts Court development, a former courthouse near the ByWard Market and the University of Ottawa that also houses numerous other arts orgs. Arts Court's 2015–19 redevelopment speaks to the success of design-driven planning. (Read more in Club SAW venue profile, pg. 46.)

The Ottawa Music Industry Coalition (OMIC) has been similarly successful as an artist-driven, community-based, membership-based initiative distinct from the municipally run advisory committee model. OMIC's co-founder Kwende Kefentse is also a DJ and co-organizer of Timekode, one of the city's longest-running dance parties. Even the once-stuffy NAC (National Arts Centre) recognizes the importance of community-oriented programming such as the emerging-artist series on their Fourth Stage.

Generous public support and hands-off municipality: The Capital Region benefits from generous public funding for institutions such as the National Arts Centre, a Crown corporation that is not subject to the vagaries of the market (nor civic bylaws), and is now "giving something back" to the local community with its Fourth Stage. The City and local BIAs have been supportive of OMIC's City Sounds outdoor concert series. Arts Court has thrived through a beneficial partnership with the City. Most view the City as a supportive, hands-off institution — few have reported any issues with noise complaints or permitting, though younger, less established organizers may have different experiences. In comparison with Guelph or Hamilton, success with public funding is helping sustain DIY-rooted organizations such as Debaser, preventing them from suffering burnout while offering inclusive programming.

***Le facteur Gatineau*:** Many noted the importance of Gatineau/Hull to the Ottawa creative community, both in terms of providing affordable housing for many artists and musicians — such as Polaris-shortlisted, Francophone avant-rock band Fet.Nat — and allowing more cultural exchange between Francophone and Anglophone communities. One interviewee wanted to see these links more officially recognized and strengthened by policymakers.


Photo: Vivek Trivedi

HAMILTON

Brief musical history: Long known as "Steeltown," Hamilton has been Ontario's Rust Belt city, an industrial blue-collar town that was — until its recent housing crisis — considered the gritty, affordable alternative to Toronto, the Brooklyn to the Big Smoke's Manhattan, proudly unpretentious and distinct from its larger neighbour. (A better civic comparison might be Philadelphia to Toronto's NYC.) Hamilton's musical identity has been mostly associated with loud or rootsy rock'n'roll — from retro punks Teenage Head to today's stadium-fillers the Arkells — but it's also had a spirit of weird, eclectic, and electronic experimentalists, from Simply Saucer in the '70s to Caribou, Junior Boys, and Jessy Lanza in the 21st century. A sense of community and camaraderie often connects these wildly disparate acts.

Musical geography: Hamilton's venues are spread across the city, which is very car-centric due to long-delayed public transportation plans such as the Hamilton LRT. Yet, a cluster of concert activity can be located along Central Hamilton's "main streets" of King and James, representing active venues such as the Casbah and Mills Hardware, not to mention now-defunct This Ain't Hollywood. Exclaim! listings data indicates that before the pandemic, Hamilton had the highest concentration of people-per-venue in the province, and second highest population-per-show after Toronto.

Survey results: Hamilton audiences are the most likely among Ontario cities to identify price and availability of tickets as a barrier to participating in live music, reflecting one operator's observation that "Hamilton loves free

HAMILTON /569K 569,353 (2021 census)

Number of music venues

Number of Music Venues: 193 (via Exclaim!)
Number of Shows Annually: 553 (via Exclaim!)
[3K ppl / venue, 1,029 ppl / show]

Selected Musical Exports

Stan Rogers, Teenage Head, Simply Saucer, Daniel Lanois, Caribou, Junior Boys, Tom Wilson, Terra Lightfoot, Jessy Lanza, Arkells, the Dirty Nil, iskwē

Notable Arts Institutions

Art Gallery of Hamilton, Supercrawl, Sonic Unyon Records, Festival of Friends, Factory Media Centre, Centre [3] for Artistic + Social Practice, Dr. Disc, McMaster Museum of Art

Educational Institutions

McMaster University, Mohawk College

Survey results

↓ Lowest perception of venues as reflecting diversity
↑ High perception of venues as under threat

Top issue for artists

- Expectation of draw

Top issues for audiences

- High ticket prices
- Shows selling out: More identified as an issue by Hamilton audiences

Top issues for operators

- Insurance, shrinking audiences
- Bar sales: More identified as an issue by Hamilton venue operators

Top alternative venue models

- Public parks, mobile outdoor stages

[shows]." Correspondingly, Hamilton venue owners identified shrinking audiences for live music and low bar sales among their biggest challenges. Artists were most concerned with bookers' expectations of drawing an audience, as well as concerns about presenters/operators being inaccessible gatekeepers. Overall, survey data indicates that drawing a consistent, paying audience is one of Hamilton live music's biggest challenges. Perhaps due to the city's interest in free programming as well as its geographic dispersal, Hamilton respondents were the most enthusiastic about mobile outdoor stages for performances. Hamiltonians were also the least likely to perceive its venues as being reflective of the diversity of their community, indicating more work may need to be done to ensure broader representation on its stages.

Interview findings: Artists, community organizers, DIY presenters, and venue owners/operators were interviewed during field research conducted in the spring of 2022. A greater diversity of stakeholders resulted in a correspondingly wider range of responses and attitudes than in other cities.

The geography of live music shows in Hamilton (Exclaim) *Map 13*

Note: Maps 13-14 show the geography of live music venues in Hamilton, among shows listed on Exclaim. Maps with equal size points indicate the presence of a venue at that point. Maps where the bubble sizes vary show the where more or less shows occur, with the bubble size corresponding to the number of shows at that location.

The geography of live music shows in Hamilton (Exclaim) *Map 14*

Nonetheless, the following four themes emerged:

Hamilton supports itself and believes in itself. There is immense hometown pride in Hamilton and recognition that, though they are considered a "B market" compared to Toronto, everyone involved in the music community needs to stick together regardless of genre affiliation or level of success — and everyone knows each other, as well. Says musician and organizer Kojo "Easy" Damptey of the Coalition of Black and Racialized Artists (COBRA), "Every musician knows every musician here in Hamilton. It doesn't matter if they are

Bros @ Supercrawl Festival, Hamilton. Photo: Ivan Sorenson

JUNO-winning artists or Grammy-winning artists or emerging artists. I know Tom Wilson, I know the Arkells. Every musician is six inches away from another musician."

More robust venue infrastructure: In spite of some gentrification-related closures — several stakeholders mentioned the loss of This Ain't Hollywood and Baltimore House, both located on/around the James Street North strip, as particularly painful — many long-running live venue spaces are still going strong, e.g., the Casbah, Mills Hardware, the Mule Spinner, or Doors Pub, while the 2021 opening of Bridgeworks is justifiably cause for local excitement and optimism. Compared with Guelph, for instance, live music in Hamilton made a strong return post-pandemic. Arkells headlined a huge hometown show for 25,000 people at Tim Hortons Field in June 2022.

Partnerships are key: Many stressed the importance of success through partnerships, whether collaborations between venues and promoters, such as Strangewaves with This Ain't Hollywood to share organizational workload, or the City with Bridgeworks and Sonic Unyon to animate a vacant building. Such partnerships can prevent organizational burnout, and sustain creativity and community.

Hamilton is a "can-do" city, but the City can always do more. There will always be some uniquely Hamiltonian challenges, such as the reluctant audiences revealed by survey data and interviews. As a result, Hamilton's presenters, artists, and venue operators are inherently entrepreneurial problem-solvers. All stakeholders recognized the City has made some steps to support the music scene, including

HAMILTON VENUE PROFILE: BRIDGEWORKS

Previously a City-owned carpentry workshop, Bridgeworks was taken over by Hamilton-based independent record label Sonic Unyon Records and converted into a 500-capacity venue, roughly equivalent in size to Toronto's Lee's Palace or the Axis Club. Founded during the indie-rock boom of the '90s as an artist-run DIY label, Sonic Unyon also began promoting live events, launching the Supercrawl free street festival in 2009 — which self-reportedly has grown from 3,000 to 250,000 attendees in its first decade — as well as opening the 147-capacity venue Mills Hardware in 2015.

Located west of Central Hamilton in a mostly residential area experiencing rapid redevelopment, the venue's name references the historic Hamilton Bridge Works Company, which built iron and steel bridges for Canada's railway system at the turn of the 20th century, and also speaks to an ethos of bridge-building. With 35-foot-high ceilings, Bridgeworks has an airy, post-industrial, creative atmosphere that sets it apart from other Ontario venues.

Sonic Unyon owner and Supercrawl director Tim Potocic was inspired by his experiences as a musician in the label's founding band, Tristan Psionic, and wished to establish a welcoming space. "I've toured across Canada and the US and been in all kinds of places that sound terrible and look terrible. Then [compare that with] being in Europe and going to places that sound amazing, look amazing, and treat the artists like gold. I tried to bring that European model back here."

Though its initially planned opening date of April 2020 was blown out by COVID, Bridgeworks hosted livestream concerts for two years before finally opening for in-person events. In addition to their own programming, Sonic Unyon rents out the venue to other promoters such as global juggernaut Live Nation and Toronto-based Collective Concerts, and also hosts community events including the theatre-centric Hamilton Fringe Festival. Though the majority of music bookings are within the spheres of punk/indie/alternative or folk/pop/rock, Bridgeworks has also booked hip-hop acts and, in November 2022, hosted the Fresh Up R&B Festival.

establishing a Hamilton Music Advisory Team (HMAT) — of which two interviewees have been members — but want to see the City do more, such as finding more ways to make City-owned spaces accessible to presenters and artists.

The "can-do" optimism that drives the Hamilton music community includes several new initiatives since COVID, such as Pop-Ups at Pier 8 — a partnership-driven series of picturesque events on the waterfront including live music alongside film, food, and vendor markets — and the Music Hall, a proposed new use for the 993-seat New Vision United Church. This gorgeous, heritage-designated space has been rented out for concerts by various promoters, but the church is still seeking an operator to run it as a dedicated venue.

Hamilton also does not yet have a dedicated Music Sector Development Officer, though it does have a staffer in the position of Business/Sector Development Consultant, Creative Industries (film, music, and fashion). Establishing a Music Office and hiring a staff person similar to such roles in London and Toronto is a key recommendation from the 2021 Hamilton Music Industry Study[103].

103 Sound Diplomacy, *Hamilton Music Industry Strategy*, pg. 91.

London, Ontario. Photo: Wayne Ray

SOUTHWESTERN ONTARIO

☛ *Please note: Survey sample size for Southwestern Ontario cities such as Guelph and London was too small for city-specific analysis. Results for the region, however, indicate a few distinctions from the rest of the province. Artists identified competition for bookings or scarcity of booking opportunities as their largest barrier more so than elsewhere in the province. This is reflective of the low availability of venues in cities such as London (according to our listings data) and Guelph (according to our stakeholder interviews).*

Artists in Southwestern Ontario were less worried about compensation and draw than other cities, though those issues were still of high concern. They were the most likely to report feelings of prejudice or alienation from the music scene — including their tastes not being shared by others, and experiences of discrimination, harassment, or feeling unsafe at events — but these issues ranked much lower than other issues.

Southwestern Ontario's audiences ranked time of day as their biggest challenge to attending, and also rated ticket cost barriers lower than the rest of Ontario. This dovetails with venue operators' identification of shrinking audiences for live music as their biggest challenge, which may be indicative of a struggling bar circuit for concerts, from which some showgoers feel excluded by late-night hours or not feeling safe in that environment.

Survey results

- ↑ More interested in hearing new music at venues
- ↑ More interested in venues preserving local culture
- ↑ Higher perception of venues as under threat
- ↓ Lower perception of venues as reflecting diversity

Top issue for artists

- Competition for booking opportunities
- Artists more likely to experience alienation as a barrier

Top issues for audiences

- Audiences report highest feelings of danger, discrimination, harassment

Top alternative venue models

- Public parks, mobile outdoor stages

LONDON /422K 422,324 (2021 census)

Number of music venues

Number of Music Venues: 29 (via Exclaim!)
Number of Shows Annually: 278 (via Exclaim!)
[14.6K ppl / venue, 1,519 ppl / show]

Selected Musical Exports

Guy Lombardo, the Nihilist Spasm Band, the Demics, the Gandharvas, Kittie, Basia Bulat, Shad, Status/Non-Status

Notable Arts Institutions

Aeolian Hall, Forest City Gallery, Grand Theatre, Museum London, Sunfest

Educational Institutions

The University of Western Ontario (UWO), Fanshawe College, the Ontario Institute of Audio Recording Technology (OIART)

Brief musical history: London is a mid-sized city located halfway between Toronto and Windsor/Detroit along the Highway 401 corridor. Something of an urban island in the Southwestern Ontario countryside, London is best known as an employment hub in the education, health, and financial sectors. It also has a long musical history going back to the big-band era of the 1930s, spawning figures like Guy Lombardo and the Royal Canadians.

The "Forest City" has also had a secret history as a hub for avant-garde and experimental music/arts, starting in the '60s with the Nihilist Spasm Band, "the world's first noise band," who included painter Greg Curnoe and later inspired iconoclastic events like No Music and LOLA Fest. In the 1990s, the city boasted a vibrant youth indie scene centred around club venues such as Call the Office and the Embassy. By the 2000s, however, the local music scene had begun a long, slow decline, and many hometown heroes made the decision to relocate to bigger centres like Toronto.

Musical geography: Much like Hamilton, London's venues are spread around the city, with a tight cluster located around the city's downtown, such as the London Music Hall and Victoria Park, and a few further east on Dundas Street, such as the Aeolian Hall. But London had the lowest availability of venues and shows in the broad Southern Ontario region, with each venue serving close to 15,000 people.

Vanished venues: Like nearby Guelph, London has suffered from key venue closures, most notably Call the Office, a downtown bar and 330-capacity live venue that since the 1980s had been a key touring stop for Canadian and international artists, including Radiohead in 1995. The pandemic was the culprit for CTO's demise, but owner Darren Quinn told CBC that "profit margins were shrinking before COVID." The pandemic also felled the larger, 1,600-capacity London Music Hall, though it did reopen under new ownership, primarily booking touring rock and electronic/EDM events.

Smaller, grassroots local artists have fewer options for accessible stages — and one of today's go-to venues for emerging artists, Palasad Socialbowl, is a bowling alley. Though some may mourn the loss of dedicated small performance spaces, this is an example of the kind of creative


Adam Sturgeon of Status Non Status. Photo Kieran Meyn

business partnerships that the live sector may need to rely on to survive.

Says Adam Sturgeon of Status/Non-Status and JUNO-nominated rock band Ombiigizi, "London has long had a burgeoning underground, but often these are relegated to house venues and less desirable or accessible spaces. Call the Office was in a rough way during its last stand and we saw the scene faltering because of it. London seems to be developing a new scene of new, young bands — kids that may never have even been to CTO."

Call the (music) office: The City of London benefits from a dedicated Music Office, led by one of Ontario's few Music Sector Development Officers, Cory Crossman. This position was created following the 2014 London Music Strategy recommendation to "create a permanent London music position and/or office[104]." In addition to the Music Office's duties of assisting artists and industry in navigating City Hall, it also hosts a robust website offering an artist directory, maps, and other resources.

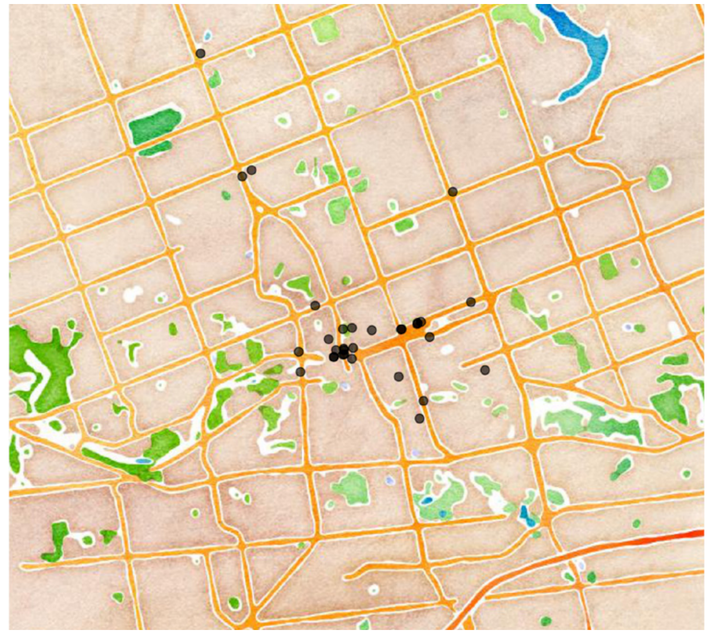
Canada's Music City?: In November 2021, to the surprise of many, it was announced that London had been designated a UNESCO City of Music, the first of its kind in Canada. The designation positioned London as a "music education and production hub" based on the strength of its three post-secondary institutions and its history hosting industry events such as the JUNO Awards.

Considering the strength of its Music Office and the prestige of the UNESCO designation, London is well positioned to close some of the gaps in its local music sector, such as its lack

104 London's Music Industry Development Task Force, City of London. *London Music Strategy*. Pg. 19. Available online: https://london.ca/sites/default/files/2022-03/CofL_LondonMusicStrategy-LMIDTF_Web.pdf

The geography of live music venues in London (Exclaim)

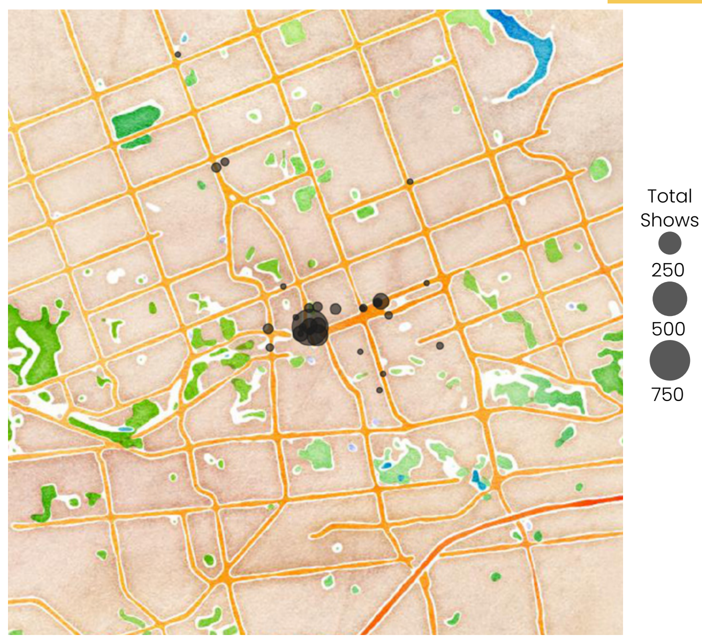
Map 15



Note: Maps 15-16 show the geography of live music venues in London, among shows listed on Exclaim. Maps with equal size points indicate the presence of a venue at that point. Maps where the bubble sizes vary show the where more or less shows occur, with the bubble size corresponding to the number of shows at that location.

The geography of live music shows in London (Exclaim)

Map 16



of accessible, grassroots venues. The city also hosts vibrant events such as Sunfest, one of Canada's leading festivals specializing in global music, held outdoors annually in downtown Victoria Park. And in spite of the real estate bubble, London still ranks as one of Ontario's more affordable mid-sized cities, meaning it should be primed to attract remote workers priced out of Toronto, and thus just waiting for its own Hamilton-style renaissance.

Basilica of Our Lady Immaculate, Guelph, Ontario. Photo: Mindmatrix

GUELPH

Brief musical history: Guelph, Ontario is a small city 80 minutes west of Toronto currently undergoing massive growth due to gentrification and the Canadian real estate boom. The "Royal City" has long had a reputation as a socially conscious, neo-hippie college town, boasting a vibrant, community-oriented music scene going back to the 1970s coffeehouse folk scene and the establishment of the Hillside Festival on nearby Guelph Lake in the '80s.

In the 2000s, Guelph spawned communitarian indie-rock labels such as Three Gut Records, while its hip-hop scene exported underground rap artists. The city's creative community has been supported by non-profit/charitable initiatives such as: Kazoo!, a diverse indie arts series and festival; GAIN (Guelph & Area Independent & New) Media, a DIY punk and metal series and festival; and the annual Guelph Jazz Festival, which leans more toward avant-garde and improvised jazz.

GUELPH /143K 143,740 (2021 census)

Number of music venues

Number of Music Venues: 41 (via Exclaim!)
Number of Shows Annually: 123 (via Exclaim!)
[3.5K ppl / venue, 1,169 ppl / show]

Selected Musical Exports

Jane Siberry, King Cobb Steelie, Jim Guthrie, Constantines, Royal City, Noah23, Miranda Mulholland

Notable Arts Institutions

Hillside Festival, Guelph Jazz Festival, River Run Centre, Ed Video Media Arts Centre, Silence, the Bookshelf

Educational Institutions

The University of Guelph, Conestoga College

Musical geography: The vast majority of live music activity in Guelph is tightly concentrated within the three blocks that make up its historic, walkable downtown, with spaces ranging from tiny bars and cafes to the 5,000-capacity Sleeman Centre. The student population, being less likely to drive, is naturally drawn to the pedestrian vibrancy of Macdonell and Wyndham Streets. The University of Guelph campus, a 30-minute walk uphill from downtown, is a less consistent locale for live music. Exclaim! listings data indicates that before the pandemic, Guelph had the second-highest concentration of people per venue in the province, after Hamilton.

Interview findings: Four common themes emerged from conversations with presenters and venue operators held in Guelph in the spring of 2022:

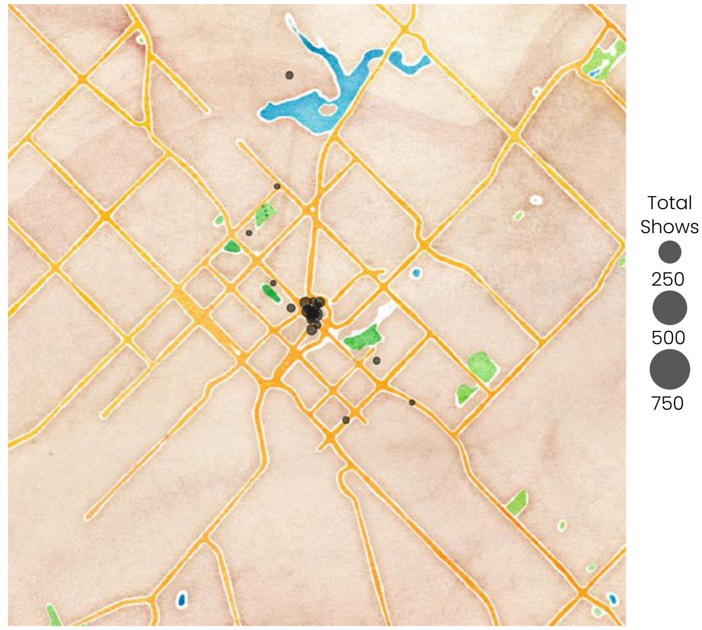
Downtown Guelph is challenged for accessible performance spaces. From the '90s to the early '10s, downtown Guelph was packed with live venues, including the Albion Hotel, Jimmy Jazz, Van Gogh's Ear/DSTRCT, and the Ebar, benefiting from brisk business from both students and "townies." Now there is only Onyx (which doubles as a nightclub, can only do early shows, and does not have a raised stage) and Jimmy Jazz (a no-cover bar with a small performance area). Other grassroots venues in Guelph include Silence, an experimental performance space south of downtown that operates as a charitable organization.

Live music in Guelph has been slower to recover from the pandemic. Concerts spotlighting local artists were only just starting to take place again when field research took place. This extended pause was likely related to the aforementioned space challenges and also due to artists moving away in response to the housing crisis, resulting in fewer active groups and performers on the local scene and less disposable income for audience members.

DIY presenters are at risk of burnout. Kazoo! Fest and GAIN both made the decision, pre-pandemic and independently of each other, that 2020 would be the final year of their festivals, as organizers had lost enthusiasm, lost key volunteers/event staff, and experienced challenges balancing volunteer

The geography of live music venues in Guelph (Exclaim) *Map 17*

The geography of live music shows in Guelph (Exclaim) *Map 18*



☛ *Note: Maps 17-18 show the geography of live music venues in Guelph, among shows listed on Exclaim. Maps with equal size points indicate the presence of a venue at that point. Maps where the bubble sizes vary show the where more or less shows occur, with the bubble size corresponding to the number of shows at that location.*

labour with paid work in other fields. Due to the pandemic, both organizations delayed their 2020 editions to 2022; though Kazoo! Fest followed through on their plans to cease operations, GAIN ultimately decided to continue presenting events thanks in part to renewed optimism related to increased booking opportunities at Onyx. Silence, meanwhile, has suffered from inconsistent funding, staff turnover, and general instability following the departure of its founder.

Lack of civic support: In spite of some grants from its tourism division, members of the grassroots music scene feel their community is overlooked by the City of Guelph, and one interviewee claimed Guelph was the "one of the least funded cities in Ontario for arts and culture." Stakeholders also frequently mentioned their frustration and disappointment over the city-run River Run Centre, opened in 1997 on the edge of downtown; though promised as a community asset, it remains underutilized and too expensive for grassroots presenters and even established arts organizations to access.

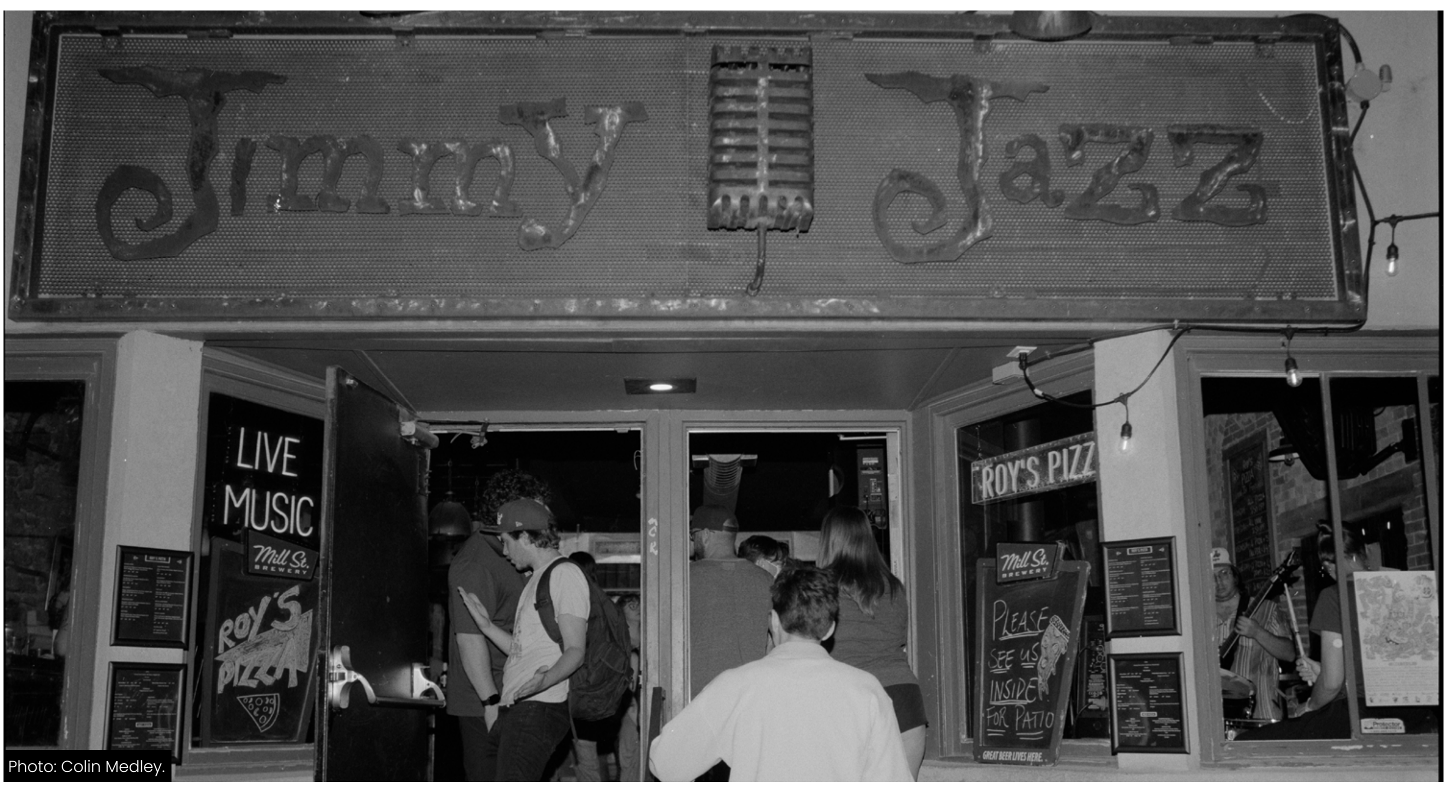


Photo: Colin Medley.

Photo: GriffUpto69

GREATER SUDBURY

Brief musical history: Four hours directly north of Toronto on the rocky Canadian Shield, Sudbury is symbolized by "the Big Nickel," the giant coin statue representing the city's status as a mining hub. But Sudbury is also immortalized in the annals of Canadian music history by P.E.I. country singer Stompin' Tom Connors' "Sudbury Saturday Night," which celebrated the town's notorious play-hard spirit. The largest city by population in Northern Ontario, Sudbury is unofficially the cultural capital of the region which, due to its geographical isolation, rugged terrain, colder climate, and demographic distinctions, is almost its own province.

The geography of live music venues in Sudbury (Exclaim) *Map 19*

Note: Maps 19-20 show the geography of live music venues in Sudbury, among shows listed on Exclaim. Maps with equal size points indicate the presence of a venue at that point. Maps where the bubble sizes vary show the where more or less shows occur, with the bubble size corresponding to the number of shows at that location.

GREATER SUDBURY /166K 166,004 (2021 census)

Number of music venues

Number of Music Venues: 13 (via Exclaim!)
Number of Shows Annually: 30 (via Exclaim!)
[12.8K ppl / venue, 5.5K ppl / show]

Selected Musical Exports

CANO, Robert Paquette, Strange Attractor, Kate Maki, Casper Skulls, Pony, Mimi O'Bonsawin

Notable Arts Institutions

Art Gallery of Sudbury, Place des Arts, Northern Lights Festival Boréal, Up Here Festival, River & Sky Camping/Music Festival

Educational Institutions

Laurentian University, Cambrian College, College Boréal

*** Survey sample size for Greater Sudbury was too small for city-specific analysis. Venue and show figures may be smaller than expected due to lower concert listings submissions from the region.*

In spite of its smaller size and relative remoteness, Sudbury has long had a strong homegrown music scene, especially in genres such as folk and country-rock going back to the 1970s, and punk and indie-rock since the '90s. The unpretentious Townehouse Tavern is one of Canada's most storied indie music venues, a key point on the national touring circuit for for over 30 years — sometimes the last stop before the long drive west.

Musical geography: Much like Guelph, Sudbury's small clubs and theatres are clustered around its tight-knit, walkable downtown. A few larger stadia can be found on the outskirts of the city, indicative of the automotive dependence of Northern Ontario communities.

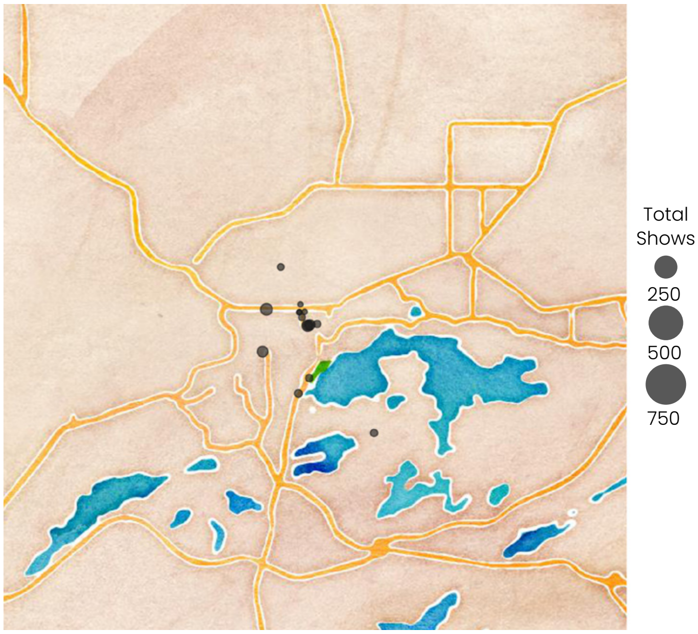
L'esprit franco-ontarien: 37% of Greater Sudbury's population is Francophone[105]. At triple the provincial average, it's a linguistic distinction that sets it apart from most of the South. This spirit of bilingualism has long been expressed in the city's music, going back to groups like '70s jazz-folk-rock collective CANO and Franco-Ontarian concert promoters la Slague. The year 2022 marked the opening of the Place des Arts, after 15 years of planning and a $30M capital campaign by a coalition of Franco-Ontarian arts groups. The stunning Moriyama Teshima Architects-designed facility includes a 300-seat performance hall, 120-seat black box theatre, cafe, gallery, bookstore, and childcare centre, plus office space for the seven arts organizations that decided to share resources to cohabitate "under one roof[106]."

Festival City: In recent years, Sudbury has positioned itself as a hub for some of the most cutting-edge summer music festivals in Canada. Taking full advantage of the short summer season, the beauty of the northern landscape, and the town's accessible scale, Sudbury is arguably the province's most successful city for music festivals. Northern Lights Festival Boréal celebrated its 50th anniversary in 2022

105 2021 census

106 Galvin, Terrance. "Under one roof: Place des Arts, Greater Sudbury, Ontario." *Canadian Architect*. Nov. 1, 2022. Available online: https://www.canadianarchitect.com/under-one-roof-place-des-arts-greater-sudbury-ontario/

The geography of live music shows in Sudbury (Exclaim) *Map 20*



The Almighty Rhombus @ Northern Lights Festival Boreal, Sudbury. Photo: Mike Bourgeault

and claims to be "Canada's longest continually running outdoor music festival." Its most recent edition featured 75+ artists spanning genres including hip-hop, indie, R&B, folk, and global music over four outdoor stages in Bell Park and two club venues[107].

Up Here Festival describes itself as an "independent urban art and emerging music festival." In addition to its acclaimed mural series that transforms downtown Sudbury "into an urban art gallery," the 2022 edition featured indie, experimental, hip-hop and electronic shows at Place des Arts, the Townehouse, and other music venues. River & Sky, meanwhile, is an intimate camping and music festival held an hour east of Sudbury, which in 2022 offered 30+ Canadian independent artists spanning a similarly diverse range of genres.

107 Northern Lights Festival Boreal. 2022 festival schedule. Available online: https://nlfb.ca/wp-content/uploads/2022/06/NLFB_Schedule2022_FINAL.png

The Idea of North: Located in Sudbury but representing all of Northern Ontario — including North Bay, Parry Sound, Sault Ste. Marie, Thunder Bay, and Timmins — CION (Cultural Industries Ontario North) was established in 2012 to promote the region's music and film/TV industries. CION's music division is supported by a full-time Music Sector Development Officer, Melanie St-Pierre, also an artist and member of indie-rock band Casper Skulls. The publicly funded non-profit hosts showcases, retreats, artist consultations and more. Sudbury has a large Indigenous population (also triple the provincial average), and CION has supported the region's First Nations artists, such as Mimi O'Bonsawin and the Johnnys.

APPENDICES

APPENDIX I.

YELP: TOP 20 TORONTO MUSIC VENUES BY 12 VENUE-TYPE TOPICS

GOOD SHOW PLACE

1. ~~**Gallery Creatures Creating**~~ *(now defunct)*
2. **Soulpepper Theatre Company**
3. **DC Music Rehearsal & Recording Studios**
4. **Tranzac**
5. **Roy Thomson Hall**
6. **St. Lawrence Centre for the Arts**
7. ~~**Lily's Place Mississauga**~~ *(now defunct)*
8. **Cameron House**
9. **Hirut**
10. **WestJet Stage** (at Harbourfront Centre)
11. **Horseshoe Tavern**
12. ~~**Gallery 345**~~ *(now defunct)*
13. **The Cavern Bar**
14. ~~**Junction City Music Hall**~~ *(now defunct)*
15. ~~**Whippersnapper Gallery**~~ *(venue now defunct; gallery still extant)*
16. **Randolph Theatre**
17. **Lola's Mississauga**
18. ~~**Vapor Central**~~ *(now defunct)*
19. **Velvet Underground**
20. ~~**Coalition**~~ *(now defunct)*
Current status: 7/20 (35%) venues now defunct

NICE VENUE

1. **Olympic Island**
2. **George Weston Recital Hall** (at Meridian Arts Centre, formerly Toronto Centre for the Arts)
3. **The Music Gallery**
4. **Massey Hall**
5. **Trinity St. Paul's United Church**
6. **WestJet Stage** (at Harbourfront Centre)
7. **Koerner Hall** (at the Royal Conservatory of Music)
8. **Randolph Theatre**
9. **The Danforth Music Hall**
10. **The Opera House**
11. **Budweiser Stage**
12. **Roy Thomson Hall**
13. **Lee's Palace**
14. ~~**Gallery 345**~~ *(now defunct)*
15. **The Baby G**
16. **Phoenix Concert Theatre**
17. **Velvet Underground**
18. **Royal Conservatory of Music**
19. **The Mod Club** (now the Axis Club)
20. **Hard Luck Bar**
Current status: 1/20 (5%) venues now defunct

GOOD SHOW PLACE, CHILL EDITION

1. **Reposado Bar and Lounge**
2. **Poetry Jazz Cafe**
3. **The Emmet Ray**
4. ~~**Vapor Central**~~ *(now defunct)*
5. ~~**Orbit Room**~~ *(now defunct)*
6. **The Painted Lady**
7. ~~**The Hideout**~~ *(now defunct)*
8. **Another Bar**
9. **Handlebar**
10. ~~**Gallery 345**~~ *(now defunct)*
11. ~~**The 300 Club**~~ *(now defunct)*
12. ~~**The Ossington**~~ *(now defunct)*
13. **Lee Lifeson Art Park**
14. ~~**Fly 2.0**~~ *(now defunct)*
15. **Cameron House**
16. ~~**Cadillac Lounge**~~ *(now defunct)*
17. **The Piston**
18. **Reservoir Lounge**
19. ~~**Reilly's**~~ *(now defunct)*
20. **The Cavern Bar**
Current status: 9/20 (45%) venues now defunct

FUN TIMES, DANCING

1. ~~**The Boat**~~ *(now defunct)*
2. **Lula Lounge**
3. ~~**Orbit Room**~~ *(now defunct)*
4. **Clinton's**
5. **Bassline**
6. **Cameron House**
7. ~~**Underground Garage**~~ *(now defunct)*
8. **Reservoir Lounge**
9. **The Garrison**
10. **DC Music Rehearsal and Recording Studios**
11. **The Painted Lady**
12. ~~**The Comfort Zone**~~ *(now defunct)*
13. **The Mod Club (now the Axis Club)**
14. ~~**Fly 2.0**~~ *(now defunct)*
15. ~~**Round Venue**~~ *(now defunct)*
16. **The Antler Room**
17. ~~**The Hideout**~~ *(now defunct)*
18. **The Piston**
19. ~~**The Ossington**~~ *(now defunct)*
20. ~~**Lily's Place Mississauga**~~ *(now defunct)*
Current status: 9/20 (45%) venues now defunct

GOOD NIGHT OUT

1. **C'est What**
2. **Another Bar**
3. **Burdock**
4. ~~**May**~~ *(now defunct)*
5. **Capitol Event Theatre**
6. **3030**
7. ~~**Seneca Pub**~~ *(now defunct)*
8. ~~**Yu Rock Cafe**~~ *(now defunct)*
9. **Dominion Pub & Kitchen**
10. **Hirut**
11. ~~**The Old Nick**~~ *(now defunct)*
12. **The Emmet Ray**
13. **Fox and Fiddle York Mills**
14. **George Weston Recital Hall** (at Meridian Arts Centre, formerly Toronto Centre for the Arts)
15. **Tranzac**
16. **Monarch Tavern**
17. **The Rose and Crown**
18. **Handlebar**
19. ~~**Junction City Music Hall**~~ *(now defunct)*
20. **Soulpepper Theatre Company**
Current status: 5/20 (25%) venues now defunct

FUN/CHILL HANGOUT

1. **Statler's**
2. **Lee Lifeson Art Park**
3. ~~**Coalition**~~ *(now defunct)*
4. ~~**Junction City Music Hall**~~ *(now defunct)*
5. **El Mocambo**
6. **Rivoli**
7. **Black Swan Tavern**
8. ~~**The Smiling Buddha**~~ *(now defunct)*
9. ~~**May**~~ *(now defunct)*
10. **Adelaide Hall**
11. **Monarch Tavern**
12. ~~**Round Venue**~~ *(now defunct)*
13. **3030**
14. **Poetry Jazz Cafe**
15. **Wide Open**
16. ~~**Cadillac Lounge**~~ *(now defunct)*

17. **Nightowl**
18. **Koerner Hall** (at the Royal Conservatory of Music)
19. **Tranzac**
20. **Massey Hall**
    Current status: 6/20 (30%) venues now defunct

GOOD SHOW & FOOD PAIRING

1. **Lola's Mississauga**
2. **The Dakota Tavern**
3. **Centro Pizza**
4. **Jazz Bistro**
5. **DC Music Rehearsal and Recording Studios**
6. **Ritz Bar**
7. ~~**The Old Nick**~~ *(now defunct)*
8. **Hirut**
9. **Black Swan Tavern**
10. **Royal Conservatory of Music**
11. **Soulpepper Theatre Company**
12. **St. Lawrence Centre for the Arts**
13. **3030**
14. **The Cavern Bar**
15. **The Antler Room**
16. ~~**Orbit Room**~~ *(now defunct)*
17. **Dominion Pub and Kitchen**
18. **Capitol Event Theatre**
19. **The Piston**
20. **The Rose and Crown**
    Current status: 2/20 (10%) venues now defunct

GOOD DRINKING PLACE

1. **Wide Open**
2. ~~**Yu Rock Cafe**~~ *(now defunct)*
3. **Ritz Bar**
4. ~~**Whippersnapper Gallery**~~ *(venue now defunct; gallery still extant)*
5. **Another Bar**
6. **Hirut**
7. ~~**Reilly's**~~ *(now defunct)*
8. ~~**The Ossington**~~ *(now defunct)*
9. ~~**Round Venue**~~ *(now defunct)*
10. **Horseshoe Tavern**
11. **The Piston**
12. ~~**Seneca Pub**~~ *(now defunct)*
13. ~~**Underground Garage**~~ *(now defunct)*
14. ~~**The Smiling Buddha**~~ *(now defunct)*
15. **Monarch Tavern**
16. **Bassline**
17. **Poetry Jazz Cafe**
18. **Handlebar**
19. **Fox and Fiddle York Mills**
20. **The Garrison**
    Current status: 8/20 (40%) venues now defunct

GOOD PLACE TO EAT

1. **Lola's Mississauga**
2. **Dominion Pub and Kitchen**
3. **Lula Lounge**
4. ~~**Lily's Place Mississauga**~~ *(now defunct)*
5. **Rivoli**
6. **Fox and Fiddle York Mills**
7. **Centro Pizza**
8. **Jazz Bistro**
9. ~~**Cadillac Lounge**~~ *(now defunct)*
10. **The Antler Room**
11. **Burdock**
12. **Nightowl**
13. **The Piston**
14. **Monarch Tavern**
15. **3030**
16. **The Rose and Crown**
17. ~~**Round Venue**~~ *(now defunct)*
18. **The Cavern Bar**
19. **The Emmet Ray**
20. **Ritz Bar**
    Current status: 3/20 (15%) venues now defunct

NEGATIVE EXPERIENCE

Current status: 6/20 (30%) venues now defunct

BAD VIBES

Current status: 7/20 (35%) venues now defunct

BAD SERVICE

Current status: 4/20 (20%) venues now defunct

** Full data set available upon request.*

YELP TORONTO MUSIC VENUES BY CLOSURE STATUS, SIZE (CAPACITY RANGE), AND VENUE TYPE.

VENUE	STATUS	SIZE *(Capacity Range)*	TYPE
Junction City Music Hall	closed post-COVID	Under 300	licensed club
Orbit Room	closed post-COVID	Under 300	licensed club
Round Venue	closed post-COVID	Under 300	licensed club
The Boat	closed post-COVID	Under 300	licensed club
The Hideout	closed post-COVID	Under 300	licensed club
The Old Nick	closed post-COVID	Under 300	licensed club
The Ossington	closed post-COVID	Under 300	licensed club
Underground Garage	closed post-COVID	Under 300	licensed club
Vapor Central	closed post-COVID	Under 300	licensed club
Cadillac Lounge	closed pre-COVID	Under 300	licensed club
Coalition	closed pre-COVID	Under 300	licensed club
Fly 2.0	closed pre-COVID	300-1000	licensed club
Gallery 345	closed pre-COVID	Under 300	DIY/non-traditional
Gallery Creatures Creating	closed pre-COVID	Under 300	DIY/non-traditional
Lily's Place Mississauga	closed pre-COVID	Under 300	licensed club
May	closed pre-COVID	Under 300	licensed club
Reilly's	closed pre-COVID	Under 300	licensed club
Seneca Pub	closed pre-COVID	Under 300	licensed club
The 300 Club	closed pre-COVID	Under 300	licensed club
The Comfort Zone	closed pre-COVID	300-1000	licensed club
The Smiling Buddha	closed pre-COVID	Under 300	licensed club
Whippersnapper Gallery	closed pre-COVID	Under 300	DIY/non-traditional
Yu Rock Cafe	closed pre-COVID	Under 300	licensed club
3030	open	Under 300	licensed club

VENUE	STATUS	SIZE *(Capacity Range)*	TYPE
Adelaide Hall	open	300-1000	licensed club
Another Bar	open	Under 300	licensed club
Bassline	open	Under 300	licensed club
Black Swan Tavern	open	Under 300	licensed club
Budweiser Stage	open	2500+	concert hall or outdoor venue
Burdock	open	Under 300	licensed club
C'est What	open	Under 300	licensed club
Cameron House	open	Under 300	licensed club
Capitol Event Theatre	open	1000-2500	concert hall or outdoor venue
Centro Pizza	open	Under 300	licensed club
Clinton's	open	Under 300	licensed club
DC Music Rehearsal & Recording Studios	open	Under 300	DIY/non-traditional
Dominion Pub & Kitchen	open	Under 300	licensed club
El Mocambo	open	300-1000	licensed club
Fox and Fiddle York Mills	open	Under 300	licensed club
George Weston Recital Hall	open	1000-2500	concert hall or outdoor venue
Handlebar	open	Under 300	licensed club
Hard Luck Bar	open	300-1000	licensed club
Hirut	open	Under 300	licensed club
Horseshoe Tavern	open	300-1000	licensed club
Jazz Bistro	open	Under 300	licensed club
Koerner Hall	open	1000-2500	concert hall or outdoor venue
Lee Lifeson Art Park	open	2500+	DIY/non-traditional

VENUE	**STATUS**	**SIZE** *(Capacity Range)*	**TYPE**
Lee's Palace	open	300-1000	licensed club
Lola's Mississauga	open	Under 300	licensed club
Lula Lounge	open	300-1000	licensed club
Massey Hall	open	2500+	concert hall or outdoor venue
Monarch Tavern	open	Under 300	licensed club
Nightowl	open	Under 300	licensed club
Olympic Island	open	2500+	concert hall or outdoor venue
Phoenix Concert Theatre	open	1000-2500	concert hall or outdoor venue
Poetry Jazz Cafe	open	Under 300	licensed club
Randolph Theatre	open	300-1000	concert hall or outdoor venue
RBC Echo Beach	open	2500+	concert hall or outdoor venue
Rebel	open	2500+	concert hall or outdoor venue
Reposado Bar and Lounge	open	Under 300	licensed club
Reservoir Lounge	open	Under 300	licensed club
Ritz Bar	open	Under 300	licensed club
Rivoli	open	Under 300	licensed club
Roy Thomson Hall	open	2500+	concert hall or outdoor venue
Soulpepper Theatre Company	open	300-1000	DIY/non-traditional
St. Lawrence Centre for the Arts	open	300-1000	concert hall or outdoor venue
Statler's	open	Under 300	licensed club
The Antler Room	open	Under 300	licensed club
The Baby G	open	Under 300	licensed club
The Cavern Bar	open	Under 300	licensed club

VENUE	**STATUS**	**SIZE** *(Capacity Range)*	**TYPE**
The Dakota Tavern	open	Under 300	licensed club
The Danforth Music Hall	open	1000-2500	concert hall or outdoor venue
The Duke Live	open	300-1000	licensed club
The Emmet Ray	open	Under 300	licensed club
The Garrison	open	300-1000	licensed club
The Mod Club (now the Axis Club)	open	300-1000	licensed club
The Music Gallery	open	Under 300	DIY/non-traditional
The Opera House	open	300-1000	licensed club
The Painted Lady	open	Under 300	licensed club
The Piston	open	Under 300	licensed club
The Rose and Crown	open	Under 300	licensed club
Tranzac	open	Under 300	licensed club
Trinity-St. Paul's United Church	open	300-1000	DIY/non-traditional
Velvet Underground	open	300-1000	licensed club
WestJet Stage (at Harbourfront Centre)	open	1000-2500	concert hall or outdoor venue
Wide Open	open	Under 300	licensed club

APPENDIX II.
LIST OF STAKEHOLDER INTERVIEWEES

Greg Benedetto	Xavier Forget	Brad McInerney	Adam Sturgeon	Nik Wever
Shaun Bowring	Kristyn Gelfand	Tim Potocic	Matt Thompson	Denholm Whale
Melanie Brulée	Becky Katz	Scarlett Raczycki	Dallas Wahlzak	Chris Wilson
Kojo Damptey	Kwende Kefentse	Jason St-Laurent	Rachel Weldon	

APPENDIX III.
SURVEY QUESTIONS

About You

Q1. *Which of the following roles do you identify with? Select all that apply.*

Please note that you will receive a series of questions based on your choice(s).

- Artist/musician who performs in venues (or wishes to perform in venues)
- Event organizer/presenter/promoter who makes use of venues
- Venue owner or operator
- Worker in the live music sector (tech, hospitality, etc.)
- Other music sector professional who attends or networks at events in venues
- Audience member who attends events in venues
- None of the above

Your Experience of Live Music Venues

Q2. *(for artists, presenters, owners, workers) During the last five years, outside of pandemic shutdowns, how frequently have you performed in or worked at the following types of venues*:

OR

Q3. *(for audience, industry) During the last five years, outside of pandemic shutdowns, how frequently have you attended events at the following types of venues*:

- Licensed clubs (e.g. Horseshoe Tavern, The Garrison, Barrymore's, The Casbah)
- Concert halls/outdoor venues (e.g. Massey Hall, Harbourfront Centre, FirstOntario, National Arts Centre)
- DIY/non-traditional venues (e.g. churches, galleries, community centres, parks, laneways, laundromats)

Never - Rarely - Sometimes (1-2 times a year) - Often (1-2 times a month) - Regularly (1-2 times a week)

Value of Live Music Venues

Q4. *As a (n) (selected role[s]), how important are the following aspects of live music venues to you? By 'live music venues' we mean any physical space that regularly or irregularly hosts live musical performances, and this definition includes live DJs as well as bands, ensembles, orchestras, choirs, and solo performers.*

1. Opportunity to perform live or DJ
2. Opportunity to experiment or try something new
3. Hearing new artists/musicians perform
4. Intimacy between performers and audiences
5. Socializing with friends
6. Networking (e.g. with artists, industry, or media)
7. Vitality they bring to my neighbourhood/city/area
8. Preservation of local culture/memory
9. Programming vision of a trusted booker curator

Not at all important - Slightly important - Moderately important - Very important - Extremely important - N/A

Q5. *(Optional) Additional comments*: ____

Perception of Live Music Venues

Q6. *Thinking about your community or local area, do you perceive live music venues as being:*

1. Endangered or threatened
2. Reflective of the diversity of my community
3. Reflective of the creativity of my community
4. Sustainable business-wise
5. Green/ecologically sustainable
6. Physically accessible spaces

Strongly disagree - Somewhat disagree - Neither agree nor disagree - Somewhat agree - Strongly agree - Don't know/Not sure

Q7. (Optional) Additional comments: ____

Accessibility/Barriers/Challenges

Q8. *(for artists or presenters) In your experience, how easy is it to secure bookings at the venues in your area?*

Extremely easy Extremely difficult

1 2 3 4 5 6 7 8 9 10

Q9. *(for artists or presenters) In ranked order, what are the three (3) largest barriers to accessing venues that you or your peers have experienced, within the last five years?*

1. Competition for/scarcity of booking opportunities
2. Lack of connection/relationship to bookers or presenters
3. Expectation of "draw" or bringing audience members to performances
4. Expectation of alcohol consumption by audience members at my performances
5. Lateness of expected performance hours
6. Lack of similar/like-minded artists to share or populate bills with
7. Lack of guaranteed compensation for performers
8. Venue costs or rental/production/tech fees
9. Lack of public interest in live performances in general
10. Continued public health risks or restrictions during COVID-19 pandemic
11. Lack of all-ages shows
12. Lack of interest in my chosen genre/style of music
13. Pressure to change or dilute my chosen genre/style of music
14. Prejudice against people from my community
15. Fear of discrimination
16. Fear of harassment
17. Lack of physical safety in venue spaces
18. Lack of physically accessible venues
19. Other

Q10. *(for audience) In ranked order, what are the three (3) largest issues you or your peers have experienced in attending live music events, within the last five years?*

1. The styles of music I like are not performed live in my community
2. My taste in music is not shared with others in my social circle
3. Time of day when live performances occur
4. Ticket/cover charges are too high
5. Tickets sell out too quickly
6. Expectation to consume alcohol
7. I can't attend a 19+ show
8. Continued public health risks or restrictions during COVID-19 pandemic
9. Fear of discrimination
10. Fear of harassment
11. Lack of physical safety in venue spaces
12. Lack of physically accessible venues
13. Other

Q11. *(for operators) In ranked order, what are the three (3) largest issues you have experienced as a venue operator within the last five years?*

1. Competition with other venues or promoters
2. Shrinking audiences for live music
3. Pressure to book certain artists/genres
4. Rent increases
5. Property tax
6. Utilities
7. Insurance premiums
8. Inflation
9. Staff retention
10. Liquor licensing
11. Bar sales
12. Building maintenance
13. Occupational health and safety considerations
14. Noise complaints
15. Other

Funding during COVID-19

Q12. *(for artists, presenters, operators) Since the start of the pandemic in March 2020, have you had:*

- More success accessing public funding than prior to the pandemic
- Less success accessing public funding than prior to the pandemic
- No change in level of access to public funding since March 2020
- N/A (Have not attempted to access public funding since March 2020)

Q13. *(for artists, presenters, operators) What funding agencies have you applied to for support since March 2020?*

- FACTOR
- Canadian Heritage
- Toronto Arts Council (TAC)
- Ontario Arts Council (OAC)
- Canada Council for the Arts
- Ontario Creates
- Ontario Ministry of Heritage, Sport, Tourism and Culture Industries (HSTCI)
- Other (with a blank space for respondents to fill in)
- None of the above

Q14. *(for artists, presenters, operators) Which of the selected streams did you successfully receive funding from?*

- I did not successfully receive funding from these streams
- FACTOR
- Canadian Heritage
- Toronto Arts Council (TAC)
- Ontario Arts Council (OAC)
- Canada Council for the Arts
- Ontario Creates
- Ontario Ministry of Heritage, Sport, Tourism and Culture Industries (HSTCI)
- Other (with a blank space for respondents to fill in)
- None of the above

Q15. *(for artists, presenters, operators) Did you receive any emergency subsidies? (e.g. CERB, CERS)*

- Yes
- No

Q16. *(Optional) Tell us about your experience applying for funding:*

If you were successful in receiving funding, did you receive enough for your project? Did the emergency subsidies improve your well-being or offer stability during the pandemic? If you did not pursue financial support, why not?

Opportunities during COVID-19

Q17. *(for artists) The COVID-19 pandemic has had an undeniably negative impact on artists' incomes and mental/physical health. But thinking back over the last two years, what new and/or unexpected opportunities have come your way as an artist since the start of the pandemic, if any?*

1. Increased number of invitations to perform live in person (outside of lockdowns)
2. More opportunities to perform outdoors or at non-traditional venues
3. More opportunities or invitations to tour or perform outside my city or region
4. Opportunities to perform virtually/digitally
5. Increased artist fees/guarantees for performances
6. Increased interest in my music (from audiences, industry, media)
7. Increased sales or streaming of my music
8. More time/opportunities for creativity
9. More time/opportunities for skill development
10. New opportunities for artistic collaboration
11. New access to public funding opportunities
12. New access to private sponsorship or financing
13. Other (please specify)
14. None of the above

Q18. *(for presenters) The COVID-19 pandemic has had an undeniably negative impact on artists' incomes and mental/physical health. But thinking back over the last two years, what new and/or unexpected opportunities have come your way as a presenter since the start of the pandemic, if any?*

1. New opportunities to present events at traditional venues (outside of lockdowns) locally
2. More opportunities to present events outdoors or at non-traditional venues locally
3. More opportunities or invitations to present events outside my city or region
4. Opportunities to present events virtually/digitally
5. Opportunities to present new artists we could not previously access
6. Increased budgets for artist fees/guarantees
7. Increased interest in the artists we present (from audiences, industry, media)
8. More time/opportunities for skill development
9. New opportunities for collaboration with other presenters or arts groups
10. New access to funding opportunities
11. New access to private sponsorship or financing
12. Other (please specify) ____________________________________
13. None of the above

Q19. *(for operators) The COVID-19 pandemic has had an undeniably negative impact on artists' incomes and mental/physical health. But thinking back over the last two years, what new and/or unexpected opportunities have come your way as a venue owner/operator since the start of the pandemic, if any?*

1. Opportunities to expand to new buildings or locations
2. Opportunities to promote/present in addition to booking events
3. More opportunities to present events off-site
4. More opportunities or invitations to present events outside my city or region
5. Opportunities to present events virtually/digitally
6. Opportunities to present new artists we could not previously access
7. Increased budgets for artist fees/guarantees
8. Increased interest in the artists we book (from audiences, industry, media)
9. More time/opportunities for skill development
10. New access to funding opportunities
11. New access to private sponsorship or financing
12. Other (please specify) ____________________________________
13. None of the above

New and Emerging Models

Q20. *How interested would you be in seeing more of the following types of spaces used for live music presentation?*

1. Parks, squares or other public spaces
2. Private outdoor spaces (e.g. parking lots, commercial squares, construction sites)
3. Privately owned DIY/non-traditional spaces (e.g. stores, warehouses, laundromats, workshops, markets, churches, galleries)
4. Publicly owned DIY/non-traditional spaces (e.g. community centres, libraries, museums)

Not at all interested - Slightly interested - Moderately interested - Very interested - Extremely interested - Don't know/Not sure

Q21. *In ranked order, which three (3) of the following alternative models for venues would you be most interested in attending or utilizing?*

1. Mobile outdoor stages (accessible in cost to smaller presenters and groups)
2. Spaces run as community land trusts (e.g. a building held in trust by a charity rather than owned by a landlord)
3. Non-profit, publicly-owned spaces (e.g. city-owned buildings transferred to a community group)
4. Private business partnerships (e.g. venues sharing space with micro-breweries, tech companies, clothing stores)
5. Co-op or membership-based spaces (e.g. access/ usage determined by membership in a collective or co-operative)
6. Public park programs for performances (e.g. dedicated stages and performance fees provided by a municipality)
7. Multi-arts partnerships (e.g. a venue as part of an arts centre including galleries, a cinema, bookshop, cafe, etc.)
8. Music centre (e.g. a venue as part of a music-focused building including rehearsal spaces, recording studios, workshop space, bar/restaurant, etc.)
9. Other/not applicable/not sure

Q22. *How important is it to you that a venue has:*

1. Livestream capabilities
2. Green/carbon-neutral status
3. Virtual reality (VR)/augmented reality (AR)/extended reality (XR) integration
4. RFID/beacon technology
5. Cashless payment for cover, bar, merch sales, etc.
6. Phone-free zones
7. Air purification systems/HEPA filters
8. Flexible/removable staging
9. Non-traditional stage placement

Not at all important - Slightly important - Moderately important - Very important - Extremely important - N/A

Q23. *(Optional) What kinds of new or alternative venues do you want to see?* _____________________________________

Genre Affiliation

Q24. *(for artists, presenters, organizers) What genres of music do you work in, book, or represent?*

1. Adult Contemporary
2. Blues
3. Children's
4. Classical
5. Country
6. Dance
7. Electronica
8. Experimental
9. Folk
10. Hard Rock
11. Hip Hop
12. Indie/Alternative
13. Jazz
14. Metal
15. Pop
16. Punk
17. Reggae
18. Rock
19. Roots/Americana
20. Soul/R&B
21. Traditional Indigenous Music
22. Global/World Music
23. Other ____________

Demographic Information

Q25. *What are the first three digits of the postal code where you live? (e.g. M6K)*

Q26. *What are the first three digits of the postal code where you work? (e.g. M6R)*

Q27. *Please select your year of birth (drop-down menu)*

Q28. *What is your gender? Select all that apply.*

1. Woman
2. Man
3. Trans
4. Gender nonbinary
5. 2-Spirit
6. Another gender identity
7. Prefer not to answer

Q29. *What is the highest level of education you have completed?*

1. High school
2. College
3. University
4. Post-graduate
5. Skilled trade certification
6. Other (please specify)
7. Prefer not to answer

Q30. *People come from many racial or cultural groups. You may belong to more than one group on the following list. Please check all that apply.*

1. African (e.g. Afro-Caribbean, African)
2. European (e.g. English, Italian, Ukrainian, etc.)
3. South Asian (e.g. East Indian, Pakistani, Bangladeshi, Sri Lankan, Indo-Caribbean, etc.)
4. East/Southeast Asian (e.g. Chinese, Korean, Japanese, Filipino, Vietnamese, Cambodian, Thai, Indonesian, etc.)
5. Indigenous (e.g. First Nations, Métis, Inuit)
6. Latin, Central and South American (e.g. Hispanic, Mexican, Ecuadorean, Haitian, etc.)
7. Middle Eastern (e.g. Arab, Persian, Afghani, Egyptian, Iranian, Lebanese, Turkish, Kurdish, etc.)
8. Other (please specify)
9. Prefer not to answer

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