



2022-23

ANNUAL REPORT

CANADIAN LIVE MUSIC ASSOCIATION

BEHIND THE PEOPLE BEHIND LIVE MUSIC

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Looking Forward



FROM THE BOARD CHAIR

“With a full year of regular operations now under our collective belt, the live music community has reason to celebrate. And while rebuilding continues, it’s with thanks to the leadership of the CLMA that our growth has been steady. We are not without challenges, but we know that through collaboration and a united voice we are well-positioned to overcome them and those that lie ahead.



Our industry is just beginning to understand and unlock our true potential in this post-COVID era. In the short 9 years since its inception, this association has established itself as the voice of an industry that cannot be ignored, and we now have a seat at the table. What we have achieved so far is because we have always strived to authentically speak for all our members. The CLMA’s persistent, dynamic, and dogged advocacy on your behalf has been and will continue to be the very best tool we have in advancing our priorities. One way we can do that is by leading Canada’s first-ever Economic Impact Assessment of the live music sector—data that will be foundational in helping us all to tell our industry’s powerful story.

We can all play a role in making sure this important study happens—because we all stand to benefit from the impact our numbers will have. So, as we look back on last year and forward into our future, let’s remember the many lessons we’ve learned including the most important one: we are so much stronger together. Business is back, and we encourage you to stay involved. Thank you all for never giving up and for all that you do for artists and fans every day.”

- NICK FARKAS, CLMA BOARD CHAIR, VP CONCERTS & EVENTS AT EVENKO

FROM THE PRESIDENT & CEO

“The future is not something to predict. It’s something to build.”

I don’t know about you, but the past 12 months feels more like two, totally different years to me. The first half was like the last push out of COVID, where we finally, finally found a kind of actual finish line. The second half was a different sort of marathon, constantly pulse-checking—were we recovering for certain? Do we really believe it’s over? Your insurance policy cost how much?—all while reconciling that we had to keep the word permanent in front of the word disruption and embrace it. Reacting quickly to how fan behaviour had shifted, adapting—always adapting—while reinforcing for government that no switch was going to magically flip, that our industry had changed, and the critical role we play for artists, audiences and communities? Clearer and more vital than ever.



We will always have challenges to overcome, and we will never forget where we’ve been. And now today, live music activity is contributing substantively in all the ways, and especially to our overall health and well-being. We are driving the Canadian economy and we are changing lives with every show. You did that. As a valued CLMA member, we know you will continue to do what you do best; we will do what we do best.

And together...we will build.

- ERIN BENJAMIN, PRESIDENT & CEO, CANADIAN LIVE MUSIC ASSOCIATION



ABOUT THE CLMA

The Canadian Live Music Association is the voice of Canada's live music industry, advancing and promoting its many economic, social, and cultural benefits.

The CLMA was founded in 2014 as a champion for the collective mission of the live music industry, from suppliers to promoters; for-profit and not-for-profit. It serves as an expert resource for its members, including venues, promoters, festivals, presenters, talent agents, industry associations, and suppliers.

Advocacy efforts focus on policy advancement, funding, public awareness, research, and activities that unite, highlight and galvanize the work of the live music sector - because a united voice is a strong voice.



OPERATIONS

- **BOARD & STAFF**
- **FINANCIAL HIGHLIGHTS**
- **MEMBERSHIP HIGHLIGHTS**
- **STRATEGIC PLANNING**

BOARD OF DIRECTORS

Nick Farkas Chair | evenko
Tarun Nayar Vice-Chair | 5X Festival
Patti-Anne Tarlton Vice-Chair | Ticketmaster
Wayne Zronik Treasurer | Live Nation
Sam Baijal Secretary | Hillside Festival
Vanessa Arscott | Plan V Productions
Kerry Clarke | Calgary Folk Fest
Troy Greencorn | deCoste Performing Arts Centre
Marlin Jones | FM Systems
Victoria Lord | Victoria Lord Public Relations
Jarrett Martineau | Chan Centre
Miro Oballa | Taylor, Oballa, Murray & Leyland LLP
Lynne Skromeda | Winnipeg Folk Festival
Robyn Stewart | Breakout West
Jon Weisz | Indie Montreal; Les SMAQ

STAFF

Erin Benjamin President & CEO
Maddy Oliver Director,
Membership & Industry Relations
Erin Coyle Senior Consultant,
Strategic Partnerships and
Projects
Sergio Emilio Parra Project
Consultant
Alison Kool Project Consultant
Anna Hilliar Project Consultant
Alex Kenzel Digital Concierge

FOUNDING MEMBERS

The Agency Group
Canadian Music Week
Collective Concerts
The Corporation of Massey Hall & Roy Thomson Hall
evenko
The Feldman Agency

Global Spectrum
Live Nation
Music Canada
NxNE
Ticketmaster Canada
Union Events

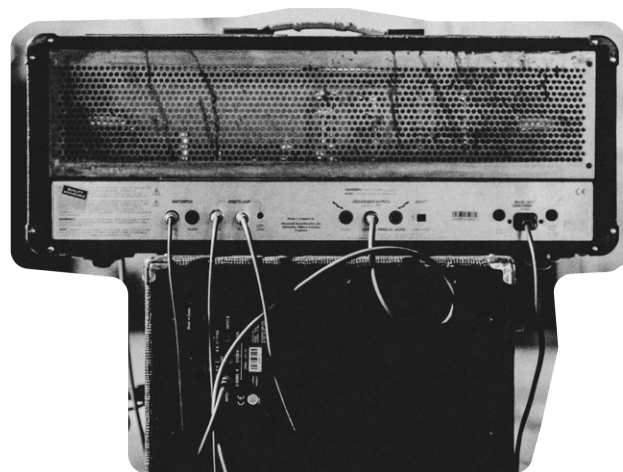
THANK YOU TO OUR FUNDERS



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the Government of Canada. Ce projet a été
rendu possible en partie grâce au
gouvernement du Canada

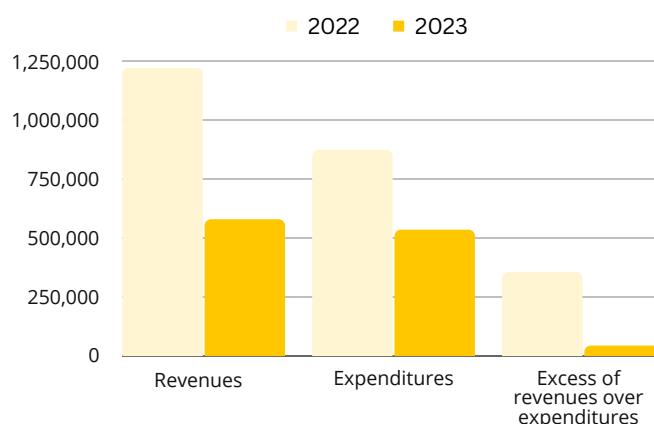


FINANCIAL HIGHLIGHTS



As predicted, 2022-2023 saw the well-forecasted transition away from COVID and other emergency funding sources and towards a rebalancing of traditional revenue, including normalising government grants and other earned revenues like membership dues. The fiscal year, while not entirely “back to normal”, is closer to pre-COVID revenues and expenses.

Numbers are subject to change.

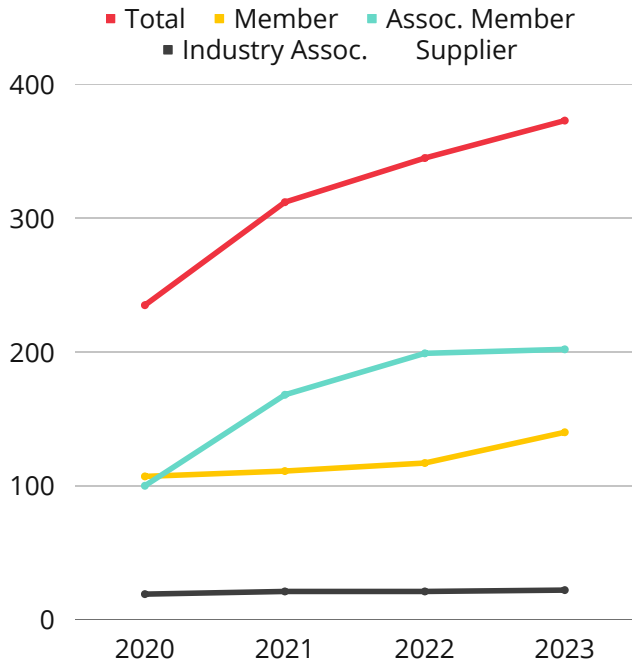


The liability that had been booked in previous annual statements has been returned to revenue and is why there is a nominal annual surplus of \$44K approximately. Without that adjustment, CLMA expenses would have exceeded revenues by approximately \$71K.

2023-24 is tracking well, however the association requires additional revenue to be raised (sponsorships, partnerships) to meet targets where major initiatives such as the Economic Impact Study are concerned, as government grants (should they be received) will not fully fund the cost of these efforts. It is widely understood however, that that study will ultimately help to shape/impact future policy (fiscal and cultural) that will leverage and support the efforts of live music companies and organizations. Additionally, membership dues are being adjusted (Jan 2024) to account for inflation, and an increase in CLMA growth and activity required to meet the ongoing needs of its members. More live music is happening across Canada than ever before. The work of the association grows with market activity and revenues are required to ensure the voice of the sector can be heard, today and in the future.

FINANCIAL STATEMENTS AVAILABLE.

MEMBERSHIP HIGHLIGHTS



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CLMA members from coast to coast to coast.

2022-23 has seen a continued growth in membership revenue, with special attention to onboarding, renewing, and strengthening relationships with Full Members across the country.

Membership remains a vital source of revenue for the association. The CLMA has thoroughly examined its membership and will unveil a new structure as part of the Strategic Plan 2023-26 with updated categories, benefits, and fees, to continue driving the value of the association.

HEAR IT FROM OUR MEMBERS

"The RCM and Koerner Hall are proud to be associated with CLMA and thankful for the leadership and advocacy you have provided. Miigwech, Merci, Thanks!"

- Mervon Mehta, Royal Conservatory (ON)

"The strength and resilience YOU bring to our industry is a shining light and inspiration for us all. Can't wait to see what the new year will bring!"

- Nicole Auger, International Indigenous Music Summit (Nat'l)

"Because of your relentless advocacy work, not only was our industry being heard but it also resulted in real concrete actions that helped stave off complete decimation."

- Mo Tarmohamed, The Rickshaw (BC)

STRATEGIC PLAN 2023-26

After 9 years servicing the live music industry, and with 3 years of shifting landscape driven by COVID-19, the CLMA embarked on a refreshed strategic plan to ensure it can continue to support our members while remaining laser focused on a strong recovery for all. This plan focuses on current needs and future opportunities in and for our industry.

The CLMA engaged consultant Erik Lockhart to create a compelling and actionable strategy to help

the CLMA shape decision-making and resource allocation.

Focus groups, key community interviews, and industry research informed a three year plan deployed at the 2023 Annual General meeting. The plan includes an adjustment plan for the CLMA membership as well as board and governance structure.

This is a summary of the 2023-26 Strategic Plan:

MISSION

To entrench the economic, social and cultural value of live music – creating the conditions for concerts to thrive, from coast to coast to coast.

VISION

Remain the first-call from government on anything related to live music.

Have a stable financial situation and have reserves to take us through at least 3 years of operating.

Be a change leader for increasing diversity in the industry.

Offer meaningful networking and regular, high valued programming with partners, to support live industry workers.

FOUR PRIORITIES 2023-2024



ADVOCACY & AWARENESS

- Build relations with Canadian business sector;
- Craft and execute government relations strategy.



SECTOR DEVELOPMENT

- Continue delivering excellent, compelling content for members;
- Continue building Live U brand, meeting capacity and professional development needs.



NETWORKING

- Create, manage and maintain “sectoral advisory groups”;
- Enhance CLMIA’s to ensure more comprehensive, coherent experience for sector.



RESEARCH

- Initiate and resource Economic Impact Study;
- Identify other research to champion sectoral priorities.

Thank you to Ontario Creates for supporting this project.



ADVOCACY HIGHLIGHTS

- **TOURISM GROWTH STRATEGY**
- **FUTURE OF LIVE**
- **FEDERAL BUDGET**
- **RECOVERY FUND BC**
- **ONTARIO BUDGET**
- **OTHER ADVOCACY**

INTRODUCTION

The CLMA is the voice of Canada's live music industry, working throughout the year to entrench the value of live music to government, policymakers, the larger music industry, and fans. The following are just some of the key examples of the CLMA's 2023 advocacy work:



TOURISM GROWTH STRATEGY SUBMISSION

The CLMA, in consultation on the Tourism Growth Strategy, submitted "[The Sound of Recovery: Leveraging the Economic, Social and Cultural Value and Power of Live Music](#)". The submission emphasized the economic role live music had to play in the recovery of the Canadian economy post-COVID and posed recommendations to empower the sector to contribute the full extent of its potential.

The CLMA thanks Tourism Industry Association of Canada for its leadership on the Tourism Growth Strategy consultation.

FEDERAL BUDGET 2023

The CLMA's 2023-24 submission included 3 asks:

- Harness the momentum of live music activity, for artists and visitor economies: Increase the Canada Music Fund (CMF) permanently to \$60M; preserve existing programs and earmark \$10M for a new, live music-specific program inside the CMF to support commercial live music companies to present and help grow the careers of Canadian artists while driving domestic and international tourism and touring through live concert and event activity.
- Make permanent the supplementary investments of \$8 million per year in [CAPF](#) program and \$7 million per year in the [BCAH](#) program, first announced in the 2019 budget and extended in the 2021 budget.
- Invest an additional \$30 million per year in these two programs (\$21 million for CAPF and \$9 million for BCAH) to support the adaptation and growth of the live performance sector in the post-pandemic era.

FUTURE OF LIVE CAMPAIGN

An ad-hoc coalition of CLMA, CAPACOA, and FAME came together in ongoing advocacy to federal government for the extension and renewal of funding programs critical to live performing arts.

REQUEST FOR RENEWAL OF RECOVERY FUND IN BC

The CLMA submitted a [letter](#) to former Minister Melanie Mark and MLA Bob D'Eith asking government to renew the Fairs, Festivals and Recovery grant program at previous levels to support their myriad direct and indirect economic, social, and cultural impacts for the people of (and visitors to) beautiful British Columbia.

ONTARIO PRE-BUDGET SUBMISSION

The CLMA's 2023-24 submission included 3 asks:

- Create a program that helps to offset the upwards of 40% increase in operating costs
- Restore the annual budget of the Ontario Music Investment Fund to \$15M and work with industry on a plan for growth including revenue optimization, profits, job creation, private investment and tax revenue.
- Sustain and make permanent \$50M for the Reconnect Ontario program.





OTHER ADVOCACY

- **Letter to CRTC** regarding Broadcasting Notice of Consultation 2023-138 in partnership with Les SMAQ
- **Submission to City of Surrey** regarding policing at Surrey festivals.
- **Insurance Crisis** - Meeting with Ontario Premier's office to address ongoing systemic challenges.
- **SOCAN Tariff 4.A** - Ongoing effort to address "experiential festivals"; most recent response to Copyright Board secretary [found here](#).
- **Outreach to Ottawa Police** to initiate better relationship between live music and the Ottawa Police Service; established dialogue enabling a safer and more vibrant community in Ottawa.
- **City of Ottawa, Nightlife Economic Action Plan** - CLMA deposition in favour of plan which includes a new live music venue
- **City of Toronto Night Economy Consultation** - CLMA staff attended "Night Economy Review: Performance/Live Spaces", a closed consultation on licensing and zoning regulations for bars, restaurants, and entertainment.
- **City of Mississauga Culture Plan Consultation** - CLMA staff consulted on "2024 Future Directions Culture Plan" to help shape the services offered by the City of Mississauga's Culture Division.
- **CLMA supports and champions** the work of other associations doing critical advocacy in the broader tourism sector such as TIAC, for example on CEBA loan repayment extensions



BUSINESS DEVELOPMENT HIGHLIGHTS

- **CANADIAN LIVE MUSIC INDUSTRY AWARDS**
- **THE NEXT STAGE**
- **LIVE U**
- **IN THE COMMUNITY**



PHOTO BY DANIEL DORTA

Live MUSIC AWARDS INDUSTRY

This year's Canadian Live Music Industry Awards (CLMIAs) took place as part of Canadian Music Week at the Westin Harbour Castle on July 9. Hosted by two-time JUNO winners Digging Roots, the show featured performances by emerging artists Katherine Li, Charlie Edward, and Ashley Sienna.

RECOGNIZING INDUSTRY EXCELLENCE

The 2023 CLMIAs returned to their pre-COVID model of celebrating the excellence of the year's live music events, organizations, and workers, bringing together the Canadians behind live music for a night of celebration and recognition.

Our 23 categories include venues, festivals, tour staff, production, agents, and managers, as well as legacy awards Legends of Live and Industry Impact. This year also saw the introduction of a new award, Your Future Boss, recognizing an outstanding leader under the age of 35 demonstrating promising talent for the future of the live music industry.

Recipients included individuals and organizations spanning live music subsectors from coast to coast to coast.



PHOTO BY GRANT W. MARTIN



PHOTO BY GRANT W. MARTIN

"I'm truly honoured. This award is voted on by the very people in this room. I call you my collaborators, my partners, my artists and first of all my friends. Thank you all."

- Grant Paley, Co-Founder & Agent, Midnight Agency; Recipient, Agent of the Year 2023



PHOTO BY DANIEL DORTA

THE NEXT STAGE

The Next Stage is a special, multi-year project that cultivates connections between Canadian businesses and the Canadian live music sector for their mutual benefit, sparking partnerships and building relationships that open opportunities for investment and development.

Originally ideated as a guide to harnessing virtual live music events during COVID shutdowns, The Next Stage has evolved into a multi-faceted B2B project, with the 2021's "Business is Better with Music" event sparking several music/business partnerships that continue today. The success of this event led to a new event in Calgary, Alberta in 2023.

THE NEXT STAGE: CALGARY

In February of 2023, the CLMA hosted an exclusive cross-sectoral networking event at Studio Bell, home of the National Music Centre, where key executives from Calgary's business community networked with insiders from Canada's live music industry to reimagine how music and business can inspire economic innovation.

The event included special live performances by local artists Yolanda Sargeant and Reuben Bullock, a fireside chat with business leaders Denise Bombenon (SureCall) and Mark Garner (Downtown Calgary Association) and exceptional, curated networking.

Thank you to FACTOR for supporting this project.

"Thank you CLMA for coming to Calgary and gathering us together! The discussion on the intersections of music with business has spurred some ideas on how to bring this to life."

- Stephanie Hutchinson, Associate Director, Presenting of Arts Commons





ABOUT

Introduced in 2022, Live U is the CLMA's sub-brand to nest activities focussing on hard-skills development, professional development, and mentorship.

With the goal of fostering a diverse and knowledgeable talent pool to meet current and future employment demands of the live music industry, Live U aims to build a strong tomorrow for Canada's live music industry.

Thank you to Ontario Create and FACTOR for supporting this project.

SESSIONS

Live U sessions, conducted digitally, covered topics important to live music membership and the development of the live music workforce, including "Recruitment Through an EDI Lens", "Creating a Civil & Respectful Work Environment", and "Life Cycle of a Booking."

Programming prioritized equity-deserving communities by working with Advance, Women in Music Canada, and other organizations to reach communities directly.



THE PATH I & II

Two-part Indigenous cultural capacity course developed by NVision Insight Group.

In the newly-unveiled The Path II, the CLMA subsidized 15 seats for industry workers who completed The Path I to continue their learning, consisting of four live online sessions with NVision course leader Jonathan (ᐱᓚᑦᑎᓐ ᐱᓚᑦᑎᓐ) Parenteau.



FOUNDATIONS OF EQUITY

Online equity training course developed by KOJO Institute.

This online training establishes company-wide clarity, direction, and alignment among staff and leaders about how to achieve equitable outcomes utilizing the frameworks of anti-racism, anti-oppression, anti-colonialism, and anti-Black racism.

IN THE COMMUNITY

INDIGNEOUS MUSIC SUMMIT

The CLMA partnered with, supported, and attended the [International Indigenous Music Summit](#), sponsoring panel “Sustaining Climate Activism and Resilience”.

CITY OF MUSIC CONFERENCE

The CLMA consulted with Tourism London on the first [City of Music Conference](#). The CLMA’s Erin Benjamin additionally moderated the panel “Driving Recovery Through Music Tourism”.

MUSIC DECLARES EMERGENCY

The CLMA partnered with and supported Canada’s first music-focussed climate summit, hosted by [Music Declares Emergency Canada](#), which took place at 918 Bathurst in November 2022.



ENGAGEMENTS, LECTURES, & ADDRESSES

CLMA staff have engaged in several keynote addresses and speaking engagements at various industry and business events including Tourism Industry Association of Canada, Institute of Corporate Directors, and Ottawa Board of Trade. Staff have also given lectures at music business college programs including ongoing student mentorship.

DIRECT MENTORSHIP

CLMA staff have continued to work with individuals and organizations in need of resources, providing consultation, letters of support, network connections, and more.

NETWORKS

The CLMA continued to provide community access to its Google Group, an email forum for all members to ask and answer questions instantly, and mailing lists for news, opportunities, and reports from the CLMA.





RESEARCH

- **LABOUR STUDY**
- **CONSUMER CONFIDENCE STUDY**
- **ECONOMIC IMPACT ASSESSMENT**

INTRODUCTION

Research is a vital tool to tell the story of the live music industry; to its organizations and workers, to government and policymakers, and to fans and constituents. The CLMA continues to identify knowledge gaps and opportunities to seek the data paramount to demonstrating the value of and opportunities within live music.

LABOUR STUDY

- Working with Nordicity to research and report on labour gaps and barriers in the live music industry in Ontario (funded by Ontario Creates BIP)
- Hosted open houses in Toronto, London, and Ottawa including stakeholders across live music ecosystems: employers, workers, people who have left the industry
- Report expected in Fall 2023

CONSUMER CONFIDENCE STUDY

"The Future is Beginning Now: Supporting the Evolution of Live Music Presentation", in partnership with Abacus Data, surveyed Canadians (with a focus on Ontarians) to explore consumer perception of the return to indoor live music.

This data has provided important contemporary context by quantifying consumer interest in live concerts, as well as live event readiness, necessary COVID precautions and more.

Thank you to Ontario Creates for supporting this study.



ECONOMIC IMPACT ASSESSMENT

The Canadian Live Music Association (CLMA) is embarking on a groundbreaking initiative to conduct the first-ever Economic Impact Assessment (EIA) of Canada's live music industry. This comprehensive study aims to evaluate and respond to the current challenges facing the industry, while harnessing its significant potential for growth and diversification, both domestically and internationally.

The primary objective of this initiative is to provide essential foundational data that empowers various stakeholders within and beyond the live music sector. By quantifying the economic and social impact of live music, the CLMA seeks to drive informed strategic decisions, enhance productivity, and bolster global competitiveness.

The significance of this study is underscored by the unprecedented circumstances brought about by the COVID-19 pandemic. As the live music sector seeks to recover and rebuild, the lack of

comprehensive data hinders effective benchmarking and planning. This assessment will address this gap by offering a clear evidence-based understanding of the industry's contributions to local spending, tourism, cultural identity, and social cohesion.

The project will seek to delve into direct, indirect, and induced economic impacts of the live music industry at both national and regional levels. The study will encompass key elements of the industry's value chain, such as promoters, venues, managers, and festivals.

Ultimately, the comprehensive Economic Impact Assessment will unlock the potential of Canada's live music industry by providing invaluable data and insights. With a clearer understanding of its economic and societal contributions, the industry can advocate for targeted support, drive innovation, and chart a resilient path forward, benefiting artists, communities, businesses, and the overall cultural landscape of Canada.

WINNIPEG FOLK FESTIVAL





LOOKING FORWARD

- **LIVE U**
- **THE NEXT STAGE**
- **LIVE MUSIC INDUSTRY AWARDS**
- **APPLYING THE STRATEGIC PLAN**
- **ONGOING RESEARCH**
- **CONTINUED ADVOCACY**

PROFESSIONAL DEVELOPMENT

Live U will continue to offer professional development and skills training that is highly valuable to and accessible for the live music community, including the Emerging Music Professionals network.

THE NEXT STAGE

The CLMA will continue to host The Next Stage events in various Canadian markets to build relationships between local live music stakeholders and corporate leaders.

LIVE MUSIC INDUSTRY AWARDS

The association will foster growth of the live music industry awards to grow community engagement and enhance celebration of Canadian live music excellence.

APPLYING THE STRATEGIC PLAN

CLMA board and staff will embark on the path laid out in its Strategic Plan, including its new board and membership structures.

The association will continue to work to entrench the the economic, social and cultural value of live music – creating the conditions for concerts to thrive, from coast to coast to coast.



THE NEXT STAGE: CALGARY | BILL MARSH



CLMIAS | DANIEL DORTA

ONGOING RESEARCH

The CLMA will continue work on the first-ever Economic Impact Assessment of the live music industry in Canada. This study will give us data vital to telling the story of the live music industry and the potential return on investment it presents.

CONTINUED ADVOCACY

The CLMA will continue to proactively and vigorously represent live music at all tables, remaining the first call from government, policymakers, and in conversations regarding the broader industry.



2022-2023

CANADIAN 
LIVE
MUSIC
ASSOCIATION

The voice of live
music in Canada
La voix du spectacle
musical au Canada