



ANNUAL REPORT
CANADIAN LIVE
MUSIC ASSOCIATION

Szjerdene with BONOBO, Rifflandia, Victoria
Photo by Deringer Photography

2019-2020

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BEHIND THE PEOPLE BEHIND LIVE MUSIC

The fifth full year of the association was extraordinary in many ways, most notable for the way it ended. COVID-19 and the effective shut down of the live music industry has shone a spotlight on the CLMA's powerful advocacy and member support services, and unified stakeholders as we continue to face unprecedented challenges together. In the final weeks of the fiscal year, CLMA services and activities increased, membership grew, and awareness of the work and existence of the organization spread. While helping members to navigate today's reality, it's important to look back on accomplishments made prior to the onset of the pandemic. This report attempts to capture the highlights of our 2019_20 fiscal year which ended March 31st, while acknowledging the role the pandemic has played in shaping resource allocation and priorities.

In 2019_20, the CLMA increased its membership by more than 20% to nearly 270 companies and organizations, with an enviable 95%

member retention rate. Both figures indicate that the association's value proposition is becoming known and appreciated. Board and staff continue to work vigorously to identify, build, and maintain sustainable sources of revenue, as well as invest in key partnerships and collaborations. The combination of diversified revenue and careful stewardship over resources has led to the association's balanced budget.

No other association is advocating for the needs of Canada's live music industry – this is the CLMA's value proposition, and our commitment to the growth and sustainability of the sector is steadfast.

"In a time of crisis - perhaps the deepest crisis our industry has ever faced - Erin, Victoria and the team at CLMA stepped up quickly and took a leadership role - organizing frequent meetings (almost every day initially!), government advocacy, and skill sharing that has proved indispensable."

- Tarun Nayar, Executive Director, 5X Fest

STAFF

Erin Benjamin **President & CEO**
Victoria Shepherd **Director of Operations**
Maddy Oliver **Project Consultant**
Nicole Auger **Project Consultant**
Alex Kenzel **Zoom Technician, Operational Support**

BOARD

Jesse Kumagai **Board Chair** | President & CEO, Corporation of Roy Thomson Hall and Massey Hall
Nick Farkas **Vice-Chair** | VP Concerts & Events, evenko
Patti-Anne Tarlton **Vice-Chair** | Chief Operating Officer Canada, Ticketmaster
Wayne Zronik **Board Treasurer** | President, Business Operations, Live Nation Canada

Sam Bajjal * **Artistic Director, Hillside Festival**
Kerry Clarke * **Artistic Director, Calgary Folk Festival**
Tao-Ming Lau * **Owner, Blue Crane Agency**
Miro Oballa * **Partner, Taylor Oballa Murray Leyland LLP**
Katy Venneri * **Director, Events, The JUNO Awards**
Vanessa Arscott **Director of Production, Plan V Productions**
Louis Bellavance **Programming Director, Festival d'Ete de Quebec**
Melissa Bubb-Clarke **Vice President, Music & Live Events at MLSE**
Tracy Jenkins **Executive and Co-Artistic Director, Lula Music and Arts Centre**
Louis Thomas **President, Sonic Entertainment Group**
Kevin Donnelly **Senior VP, Venues & Entertainment, True North Sports & Entertainment LTD**
Nick Blasko **Director, Amelia Artists Inc. & Atomique Productions Ltd**
Tarun Nayar **Executive Director, 5X Fest**
Kim Rayworth **Managing Director, Capitol Theatre**
Lynne Skromeda **Executive Director, Winnipeg Folk Festival**

We thank those outgoing board members for their service and contributions to the sector.

* Elected in 2019

A photograph of Shawn Mendes performing on stage. He is wearing a black short-sleeved shirt and black pants, holding a microphone in his right hand raised high. A guitar is slung over his shoulder. The background is a large crowd of fans with their hands raised, illuminated by blue stage lights.

SECTION 1 A LOOK BACK AT SOME HIGHLIGHTS

KEY ADVOCACY WORK

As the voice of the live music industry, the CLMA works on behalf of its members and stakeholders and seeks to entrench the significant social, cultural and economic value, scope and impacts of live music activity. Highlights of the CLMA's 2019-2020 work include:

- Dialogue with the Ontario Government regarding the importance of investment and support from the Ontario Music Fund and Celebrate Ontario
- Direct impact on secondary ticketing legislation, multi-province
- Safety, security, and sexual harassment training and dialogue
- Noise bylaw and zoning reviews in various cities across Canada
- Direct impact on the renewal of Amplify BC
- Ongoing implementation of the Vision for Ontario's Live Music Industry
- Addressing and responding to challenges facing small venues, multi-city
- Regional Advisory Council Program, multi-city/regions
- Building key relationships with Canada's tourism sector locally, provincially and federally
- Strategic music cities work, specifically: Ottawa, ON, Fredericton, NB, Halifax, NS and others
- Education and awareness of the impact of live music in public and private sectors
- Industry-wide advocacy efforts through participation in a wide-variety of sector/industry/business collaborations



Exco, JAMBANA, Brampton
Photo Credit YYZ Toronto Reggae

RESEARCH

RE:VENUES THE IMPORTANCE AND IMPACT OF TORONTO'S LIVE MUSIC SPACES

In partnership with Ontario Creates, the City of Toronto, Downtown Yonge BIA, and other key sponsors including Tourism Toronto, this groundbreaking study will seek to demonstrate the contribution and impacts stimulated by Toronto's live music venues on the economy and the music industry at large.

The research, led by Canadian research consulting firm, Nordicity, will form a narrative that articulates the value of live music venues to the city of Toronto, and their challenges in the face of the COVID-19 pandemic. Data has been collected from a variety of key stakeholders, including representatives from the live and broader music industry, artists, the tourism sector, BIAs, and others. The final report will include recommendations for the music community, the public, and government regarding the future and long-term viability of Toronto's live music venues.

RAISING THE BAR HELPING TO **MAKE EVERY LIVE MUSIC SPACE A SAFE PLACE**

Raising the Bar is a national training program delivered in partnership with community organizations who provide hands-on training and education to ensure safer spaces, harm reduction, and event safety in Canada's live music industry.

Raising the Bar debuted its specialized masterclass programming in November 2019. Events were held in Toronto, Ottawa and Vancouver. Masterclasses were led by UK safety expert, Steve Blake of STORM 4 Events. These intimate sessions provided participants with a unique opportunity to seek expert guidance for issues specific to their own venues and/or events.



**HELPING TO MAKE
EVERY LIVE MUSIC
SPACE A SAFE PLACE**

STAKEHOLDER BUSINESS DEVELOPMENT

In addition to the CLMA's professional development offerings, the association continued to provide members with exclusive benefits, such as:

- Member spotlights
- Free advertising opportunities (i.e., CLMA newsletters, website, sponsorship opportunities)
- Members-only networking events (i.e., Canadian Music Week, exclusive invitations to study launches, round tables, and advocacy efforts at all levels of government)
- CLMA-specific discounts to a variety of events, products and services
- Direct one-on-one mentorship and strategic advice

IN THE COMMUNITY

The CLMA was present at numerous networking events across Canada and was a proud partner and/or sponsor of conferences, awards and recognition opportunities for live music stakeholders.

CLMA President & CEO, Erin Benjamin was featured as a keynote speaker at the 2019 Creative City Summit: "Growing the Creative Cultural Economy for 21st Century Cities." The discussion examined the development of ecosystems needed to grow, support, and sustain creativity in the public domain.

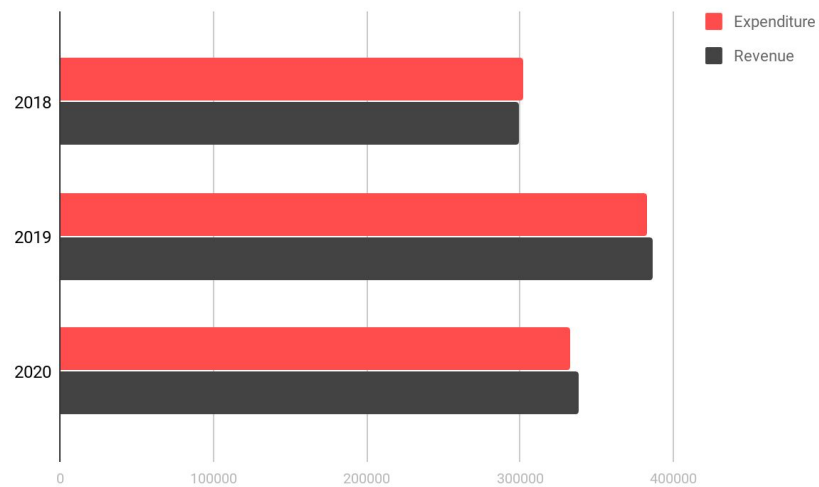


FINANCIAL HIGHLIGHTS


This report is accompanied by detailed Annual Financial Statements.

The CLMA's expenses and revenues ebb and flow with various projects and services supported by government grants. The 2019_20 fiscal year saw a small operating surplus for the 2nd year in a row.

AT A GLANCE



	Revenues	Expenditures	(- / +)
2018	299,443	302,241	- 2,798
2019	386,057	382,354	3,703
2020	338,476	332,543	5,933



SECTION 2
NAVIGATING
THE COVID-19
CRISIS
THE VOICE OF
THE LIVE MUSIC
INDUSTRY

THE VOICE OF THE LIVE MUSIC INDUSTRY THE COVID-19 CRISIS

The COVID-19 crisis is indicating how critical all live music stakeholders are to the delicate fabric of Canada's touring infrastructure and the industry at large.

Until recently, this vibrant industry contributed upwards of \$3B to Canada's GDP and supported 72,000 jobs – the lifeblood for many of our artists... for whom touring and live performance was their primary source of revenue.

During these unprecedented times, the CLMA has remained in constant communication with its stakeholders and has worked tirelessly to ensure that all voices within the live music sector are heard and represented in its advocacy efforts.

LIVE MUSIC ECOSYSTEM



Saving Canadian Live Music, 2020



RBC Bluesfest - Ottawa
Photo by Steve Garecke

MEMBERSHIP MILESTONES

Membership matters: our members are the backbone of live music in Canada, providing opportunities for artists and experiences of a lifetime for fans.

The CLMA exists to serve our members: concert promoters, festivals, venues, clubs, arenas and stadiums, concert halls, talent agents and managers who represent the artists, ticketing companies, industry associations and networks, as well as suppliers of goods and services to the live music sector from across Canada. Members of the CLMA represent the full spectrum of the live music sector, including those eligible for public funding as well as those who operate on a for-profit model.

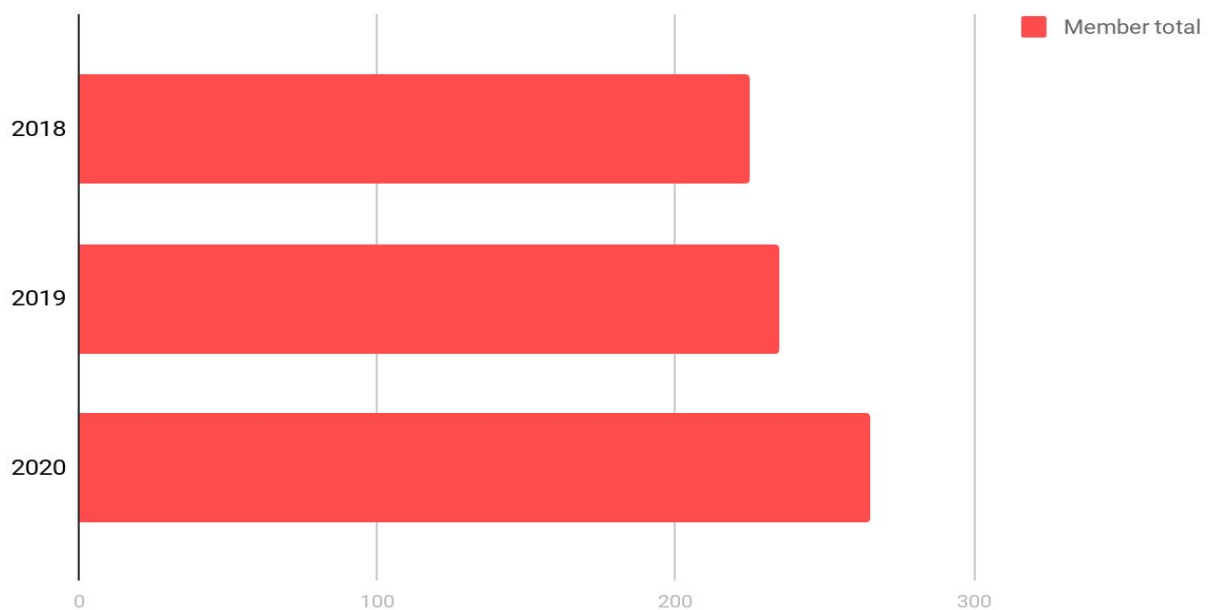
“CLMA has been an incredible advocate, supporter and resource during the COVID-19 pandemic. As a small music festival in B.C., we have appreciated and benefited from the knowledge they have shared via webinars, weekly meetings and distribution of resources and updates that we simply couldn't have found on our own. Thank you for all that you're doing to keep live music alive during these challenging times.” - Karen Zukas, Executive Director, Fort Langley Jazz & Arts Festival

MEMBERSHIP MILESTONES

Our members represent the industry, from independent concert promoters to small clubs, in cities and towns across Canada. They are the organizations that fuel our economy, talent agents who represent the artists who inspire us, and festivals that put Canada on the international map as a global destination for live music. Together, they contribute to the social, cultural and economic fabric of Canada.

Increases in membership are a direct result of the CLMA's valuable COVID-19 and other advocacy, information sharing, professional development opportunities, and strong, committed membership service. The CLMA is here for you today, and will be here tomorrow, to help usher in our brighter, collective future.

MEMBERSHIP MILESTONES GROWTH IN TIMES OF CRISIS



Advocacy Efforts and Achievements

Over the past six months, in addition to the CLMA's previous advocacy efforts to entrenching the value and power of live music in the minds of government, the association quickly pivoted to provide the live music community with news, panels, and a voice to all levels of government in order to support the sector throughout the COVID-19 pandemic and facilitate a safe reopening. Highlights of this work include:

- COVID-19 Resources for the live music community on the CLMA website
- The first association to gather sector-wide information on the potential effects of the pandemic and to reach out to government with relief recommendations
- Co-Chair of the Ministry of Heritage, Sport, Tourism, and Culture Industries "Ontario Music Panel"
- Appearance before the Standing Committee on Finance and Economic Affairs regarding the impacts of COVID-19 on the live music industry
- Leading international conversations with the International Live Music Conference (ILMC)
- Stakeholder surveys to advocate on behalf of the sector with an informed and unified voice: COVID-19 impact, lost revenue, accessing relief programs, non-clients of federal grant programs, agents needs assessment
- Curated information sessions and professional development panels featuring domestic and international leaders in topics including events safety, insurance, PPE, and mental health
- Changes to BDC regulations
- Changes to the CERB program on behalf of artists and others
- Consistent quantification and advocacy of the impact of the crisis on the sector, leading to (among other results) the \$20m set aside for live music through Canadian Heritage's Phase 2 emergency relief fund
- Encouraging (and now seeing) funding agencies flow grants to clients, with flexible terms
- Championing sector-specific relief efforts that will recognize the breadth, role and value of the live sector

"The CLMA has been pivotal in galvanizing the live music industry as a whole and advocating for immediate and ongoing support for our sector in response to the COVID-19 crisis. Through the weekly meetings, we've had the opportunity to learn from and be inspired by colleagues across the country while staying abreast of the latest government COVID-19-related announcements and recommendations." - Tracy Jenkins, Executive & Co-Artistic Director, Lula Music and Arts Centre

PROFESSIONAL DEVELOPMENT PANELS **ACCESSIBLE AND ONLINE**

Since mid-March, the CLMA curated a wide diversity of information sessions and professional development panels, as often as three times per week, to support the Canadian live music sector through the lasting crisis. All recordings have been archived and are available to members upon request. Recent highlights include:

- Don't Stand So Close to Me: The Do's and Don'ts of Social Distancing in Live Music (insert picture)
- Licensing Live (Stream): Licensing Process Tips & Cost Considerations (insert picture)
- Keeping Your Brand Alive While the Doors are Shut
- All You've Never Wanted to Know About PPE (But Were Too Afraid to Ask)

Some of our notable featured panelists include:

- Mark Davyd, CEO, Music Venue Trust
- Riah Sethna, Director of Live Music & Entertainment, Global Partnerships, MLSE
- ShoShona Kish, Artist; Chair and Founder, Indigenous Music Advisory Council
- Jim Cuddy, Artist
- Ashlee Froese, Founder, Froese Law

- Peter Katz, Artist
- Terri Mann, Vice-President Financing, BDC
- Steve Adelman, Vice President, Event Safety Alliance
- David Robinson, Interim President & CEO, Destination Canada
- Dan Moulton, Vice President, Crestview Strategy
- Patrick Rogers, Vice President, Corporate Affairs, Music Canada
- Dr. Stuart Weiss, Founder, Intelligent Crowd Solutions
- Sean Casey, Vice President, Global Public Affairs
- Janet Sellery, Health & Safety Consultant, Sellery Health + Safety; Chair, Event Safety Alliance Canada

Membership growth of 22% (34 members) in a three month period

This marks the most new members in the shortest period of time during the life of the organization.

ADDRESSING DIVERSITY & INCLUSION IN LIVE ACCESSIBLE AND ONLINE

The CLMA's ongoing commitment to diversity and parity is reflected in its team, Board, partners and membership. It is a priority of the CLMA to increase the representation and amplification of diverse voices within the Canadian live music industry. The association presented two professional development panels specifically dedicated to addressing diversity and inclusion in the live sector.

Listening: Understanding BIPOC Perspectives in the Canadian Live Music Industry

- Tarun Nayar, Executive Director, 5X Fest
- Zaki Ibrahim, Artist
- ShoShona Kish, Artist and Activist
- Yvette Angela, Co-Founder, UNCDTNL; Agency Associate, Blue Crane Agency
- Alan Greyeyes, Festival Director, sākīhiwē festival
- Jarrett Martineau, Lead Music Planner, City of Vancouver

Our Future, Your Future: Identifying and Dismantling Barriers to Women in the Live Music Industry

- Sam Slattery, Founder, Women in Music Canada
- Gabrielle Rubaine, Curator, Rubaine Consulting; Producer, International

- Women's Day Music Summit
- DJ MelBoogie, Artist, Radio Host, Promoter
- Paola Palazzo, Vice-President, Live Nation
- Jennifer Sookdeo, Event & Production Manager, Sooks Production & Entertainment Services
- Stefanie Purificati, Agent, APA Agency
- Ila Barker, Artist

“It’s been great seeing that there is space for members of all shapes, sizes, and types, and that advocacy work – work that is making an actual difference – is being done with that diversity of membership in mind. The BIPOC perspectives panel in particular was incredibly important and impactful (and we came to invite Tarun to join Global Toronto as a result of seeing him there), and we hope that CLMA’s efforts continue in this direction, raising up marginalised voices and bringing these issues to the fore. However we can be of assistance we are eager and happy to play a role.” - Jonathan Campbell, Head of Programs, Small World Music



SECTION 3

A NEW REALITY

FOR LIVE MUSIC

REBUILDING WITH INCLUSIVITY AS A PRIORITY

The Canadian Live Music Association (CLMA) recognizes that Black, Indigenous and People of Colour (includes artists and all those professionals who create and supply, promote and work in live music) are making a significant contribution to Canada's music community; however, the existence of deep-rooted, systemic racism and discrimination prevents those people from fully participating in and benefitting from the Canadian economy. BIPOC music workers experience greater difficulty in getting booked for the stage, getting hired in the field, and accessing support in the current climate. Ontario's live sector suffers skewed representation in favour of white music workers due to sociocultural, economic, and political barriers that require critical examination and change.

Recognizing the critical importance of addressing these issues, the CLMA will seek to create a cohort of BIPOC colleagues who will be asked

to work alongside the CLMA in a consultative role to help ensure priorities are being met, head on. The role of the advisory council will be to work with the CLMA to entrench the needs and priorities of BIPOC communities in all aspects of the association's work. The goal is to ensure that BIPOC voices are part of each and every discussion and decision the CLMA takes moving forward.

PROFESSIONAL DEVELOPMENT IN THE NEW PARADIGM LEADING LIVE MUSIC INTO OUR FUTURE

As one of the first industries affected by the pandemic, the live music sector will be under siege for much longer than most stakeholders and policymakers could have expected at the outset of this crisis. A study by Abacus Data reveals that more than half of all Canadians plan to refrain from attending music venues (festivals, pubs, large and small venues, etc.) for 6 months or more after physical distancing restrictions are lifted. Implementing and communicating best practices regarding safety to restore consumer confidence in attending live events will be crucial to the recovery of the live music industry.

The CLMA will develop and deliver a series of online professional development workshops and seminars, in partnership with other leading Canadian music organizations and relevant stakeholders. The training program will focus on the safe reopening and return of the live music industry in Canada. Recognizing that a safe and successful reopening of the sector is one that acknowledges and supports all of Canada's diverse music workers, this program will also include educational and professional development programming curated by our BIPOC advisory council. By supporting the live music community in implementing and maintaining best practices, we will lay the groundwork to ensure that once live music reopens, the sector remains both intact and ready.

UPDATE RE:VENUES

Due to the undeniable impact that COVID-19 has had on live music venues in cities such as Toronto, the CLMA chose to delay the release of this study in order to ensure the report accurately reflects the current challenges facing Toronto's live music venues.

We now expect to release the report in early **Fall 2020** and look forward to working to implement the study's important recommendations.



Losses per permanent venue closure

Assuming the 11 closures to date are representative of the type of venues that are likely to go out of business due to the ongoing effects of COVID-19 shutdowns, each venue closure would contribute the following permanent annual economic losses in Ontario.



5 FTEs (direct)
10 FTEs (total)



\$242k in GDP (direct)
\$575k in GDP (total)



\$148k in taxes
(federal and provincial total)

In addition, every permanent venue closure due to COVID-19 will significantly reduce the number of performance opportunities available to Toronto musicians. For many, this will affect their ability to earn a living from music.



212
shows per year



2.1 acts per show
on average



455
acts per year

Nordicity Study, 2020

“The Venue study report is coming at critical time when the loss of performance venues is at it all time high. Canadian Live Music Association leadership and the other key stakeholders participating in this project are ensuring that the importance and value of venues is quantified, not only for their economic contribution but for the quality of life they bring to the neighbourhoods we all live in.” Mark Garner
Chief Operating Officer of the Downtown Yonge BIA.



Festival international de Jazz de Montréal, Québec
Photo by Benoit Rousseau

CMW LIVE MUSIC INDUSTRY AWARDS

The CLMA partnered once again with Canadian Music Week (CMW) and had begun planning to celebrate the live music Industry with the 45th Annual Canadian Live Music Industry Awards well before the COVID-19 shutdown. We look forward to celebrating and honouring the live music industry when CMW returns in 2021.



Billy Talent, 2018 Live Music Industry Awards Dominion Ballroom, Sheraton Centre Toronto



Canadian Live Music Association & Canadian Music Week

2020 Live Music Industry Awards
presented by Stingray and El Mocambo

Friday, May 22, 2020
Happy Hour 5:30-7:30PM
El Mocambo
462/464 Spadina Ave., Toronto

NOMINATIONS OPEN FEB. 3, 2020

(Lu Kala, 2019 Live Music Industry Awards)

WITH OUR THANKS

Sincere thanks to the partners, supporters, funders, and especially our members for standing together and building a strong, united voice for Canada's live music industry.

Founding Members:

- **Neill Dixon**, Canadian Music Week
- **Jeff Cohen**, Collective Concerts
- **Nick Farkas**, Evenko
- **Brian Ohl**, Spectra Venue Management
- **Riley O'Connor**, **Erik Hoffman**, Live Nation
- **Graham Henderson**, **Amy Terrill**, Music Canada
- **Michael Hollett**, NXNE
- **Stan Dunford**, Republic Live
- **Deane Cameron**, **Jesse Kumagai**, The Corporation of Massey Hall and Roy Thomson Hall
- **Tom Kemp**, The Feldman Agency
- **Patti-Anne Tarlton**, Ticketmaster Canada Ltd
- **Jack Ross**, **Jean Wilkinson**, APA Agency

Made possible with the support of Ontario Creates.



Marty Baller, RBC Bluesfest, Ottawa
Photo by Steve Gerecke