

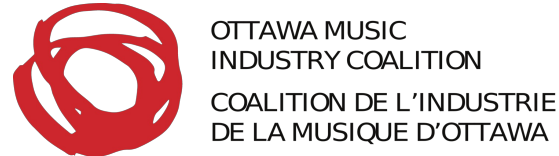
# Reflections on Labour Challenges in the Live Music Industry

August 2023

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A black and white photograph of a stage setup. In the foreground, there are several microphones on stands, some angled towards the left. In the background, there are various pieces of musical equipment, including what appears to be a keyboard on a stand and a cymbal on the right. The lighting is dramatic, with strong highlights and deep shadows. A black rectangular box is superimposed in the center of the image, containing the word "Introduction" in a bold, white, sans-serif font.

# Introduction

# Introduction to Report

## Background

The purpose of this exploratory study is to take a pulse of the live music workforce in Ontario and its challenges following COVID-19. In sharing the key challenges facing Ontario's live music workforce at present, this report also proposes possible avenues for various organizations and champions in the ecosystem to explore, support, and nurture a healthy and robust live music workforce.

## Mandate

The Canadian Live Music Association (CLMA) commissioned a research project to explore and address labour shortages in Ontario's live music industry. The ultimate goal of this research is to identify ways to improve the attraction and retention of a live music labour force (and thus a live music industry in general) in Ontario, and by extension, Canada.

**This report brings together research and insights gathered from those working in, aspiring to work in, or who have recently left, the live music sector in 'behind the scenes' roles (i.e., not artists). Such roles include venue owners, sound/lighting technicians, event and festival producers, PR and promoters, tour managers, and so on.** Key themes that emerged from this research have been arranged into a framework that outlines the optimal conditions needed to improve the sustainability and vitality of Ontario's live music workforce.

## Methodology

The main aspect of the research process was to hear from people working in the industry. **Three open houses** were held across the province in Ottawa, London, and Toronto. An estimated total of **85 people** who work/worked in live music were consulted **across both the open houses and an online input form** (designed for those who were unable to attend in person).

Three key questions were asked to all:

- What does an ideal live music industry look like? Who should be involved? How?
- What does a supported live music industry workforce include? If you've left, what would get you to return to work in live music?
- What opportunities would help you to advance your career in live music?

A **validation session** was held with a small group of industry stakeholders (including representatives from associations, major employers in live music, and municipalities) to add further nuance to what was heard and to help identify potential paths forward.

# State of the Industry

## Framing the Problem

This research was stimulated by a perception that Ontario's live music industry is experiencing a labour shortage. Through the research process, Nordicity developed a more nuanced picture of this shortage:

- The pandemic revealed the **precarious conditions of the industry** – people were often forced to find new work during that time. Not all jobs, nor all music professionals, have since returned.
- People reported facing **challenges entering the industry**. Even those already working in the sector and actively seeking employment prospects are having **trouble finding opportunities**.
- **Shortages may be in certain facets of the industry**, rather than across the board (e.g., it was suggested that there is a shortage of lighting personnel for shows, and experienced live A/V techs).
- It seems that the labour shortage is mostly seen among **mid-career workers**, rather than new entrants or more junior workers.

These insights indicate that the problem may go beyond labour shortages – as such, envisioned solutions need to be more multi-faceted and collaborative. There appears to be a disconnect between existing talent and opportunities, and several barriers for emerging professionals to get started and grow their careers in the industry. At the same time, limited opportunities may also be a result of saturation in some areas in the market. Additionally, those from marginalized communities – particularly workers who are Indigenous, Black, and People of Colour – experience labour issues more strongly, as explored in CLMA's report, [Closing the Gap](#).



# Vision for an Ideal Live Music Industry

## An ideal live music industry is one that is...

- ✓ Stable, sustainable, and disaster-proofed
- ✓ Accessible for new live music workers to enter (including access to training, mentorship, awareness, and equal access to opportunities)
- ✓ Equitable and fair for workers from all backgrounds, genders, ages, and abilities
- ✓ Open and inviting to people from all backgrounds, genders, ages, and abilities
- ✓ Supportive and safe

## What is needed to achieve this vision?

In order to reach this ideal vision, there are some key elements needed across the industry:

- Overarching coordination and leadership
- A place for all within the industry – diversity and inclusion
- Collaborative effort across all players in the ecosystem, including (but not limited to) city governments, associations, major employers in the industry, and post-secondary institutions



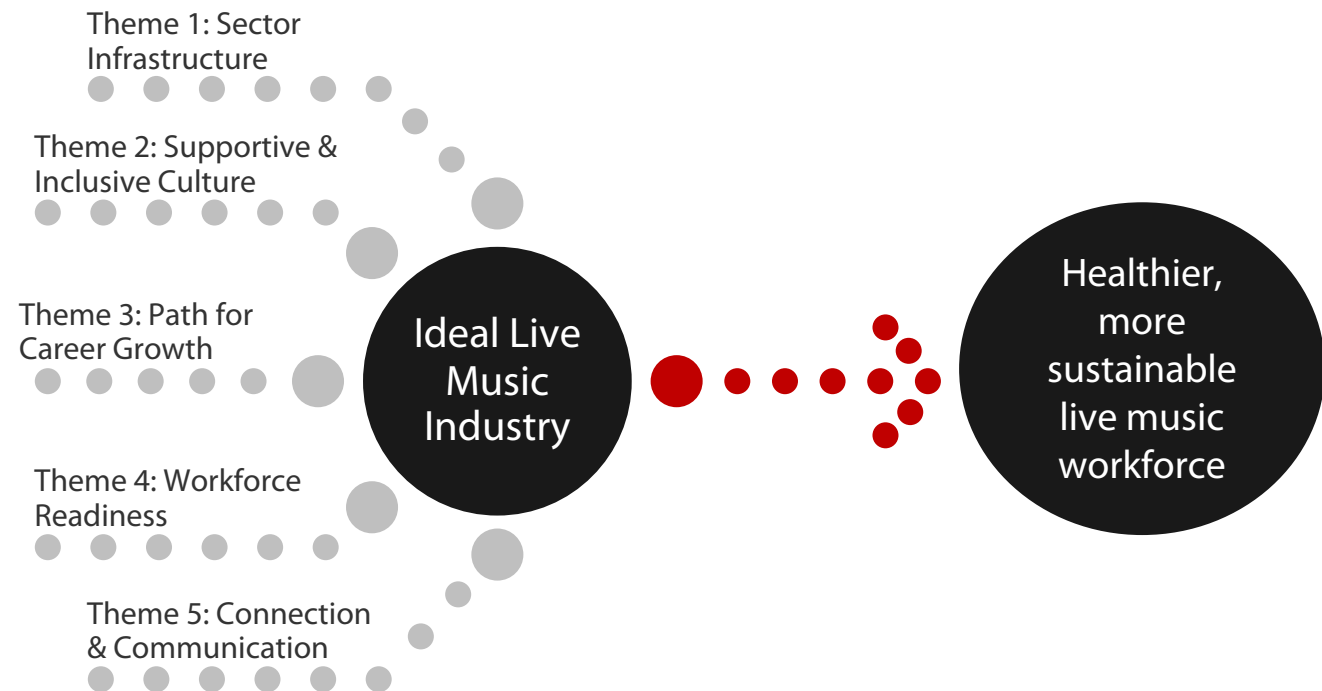
A large crowd of people at a concert, with many hands raised in the air. The scene is silhouetted against a bright, hazy background, likely a stage or light source. The overall mood is energetic and celebratory.

# Framework & Themes

# Framework Overview

## Framework

The below framework includes **five key themes** that emerged from discussions with those in the industry. These themes are the areas of action that need to be addressed in order to reach an ideal live music industry, and ultimately, create the conditions that are needed for a sustainable workforce. Moving this framework forward is **a shared responsibility across the ecosystem**, however, where specific parties can take lead on actions is noted within the following slides.



## Theme 1

# Sector Infrastructure

## What Was Heard

Research highlights several policy and infrastructure-related challenges:

- **Municipal policies:** Municipal policies can often impede live music activity, including parking limitations, insurance liability, permits, etc. Some municipal bylaws (e.g., zoning) directly affect operations of critical live music employers (e.g., venues).
- **Transit:** Having reliable and safe public transportation during (late) working hours is a challenge for many late-night industries.
- **Space/venues:** The recent closure of many venues across Ontario is not just a problem for artists – it also presents an issue for all those in their orbits (bookers, managers, etc.). Supporting spaces where music thrives (e.g., event spaces/venues, performance halls) is integral to ensuring live music workers have a place to do their jobs.
- **Compensation and benefits:** A lack of labour standards (particularly in terms of pay and benefits) was commonly cited as a challenge. As such, many live music workers do not understand their value nor what constitutes a fair wage.
- **Overarching organizations:** While overarching organizations such as unions or industry associations can provide much needed support, it is difficult for live music workers to organize when so many are contractors. A need for more proactive recruitment from the unions themselves was shared across the open houses, though some industry workers note that the high cost of joining a union can be a barrier to joining one regardless.



## Theme 1

# Sector Infrastructure

## What Was Heard (Cont.)

- **Exclusivity clauses:** Many venues and festivals enact exclusivity clauses in their contracts, which state that a contractor cannot work for another client while they are on contract with them (or during the same season). This clause is coming from a scarcity of people – organizers naturally want to ensure their event is staffed and need assurance that staff will not leave for another, better paying, contract. However, this clause limits freelancers' job prospects and impacts their ability to make a living.
- **Safe working conditions:** Those consulted, especially women, hope to see steps taken to ensure working conditions are safe, inclusive, and welcoming for everyone.
  - There is a [Code of Conduct](#) for the industry, that establishes a standard to which shows/festivals/venues can be held. However, there is not universal

awareness of this Code (or knowledge of what it includes) across those working in the industry.

- Hazard pay was also raised as a need for acknowledgement of risks, such as setting up lighting and sound equipment in venues with very high ceilings, or in outdoor settings.



## Theme 1

# Sector Infrastructure

## What's Required

There are several areas to focus on to address challenges, and shape a strong and efficient live music workforce:

- **Municipal advocacy:** Support at the municipal level is keystone to creating an ideal industry, as a champion within municipal structures can turn barriers into possibilities. This support can be accomplished with live music friendly bylaws and policies such as late-night transit, parking, noise regulations, zoning, etc.
  - Developing and adopting municipal music strategies and nightlife economy action plans in partnership with local live music communities is critical.
- **Templates and guides around best practices:** Guidance is required to help workers better navigate the industry and advocate for themselves. Doing so involves:
  - Developing clear benefit guides, and compensation for in-kind hours.
  - Developing accessibility riders, venue guides with photos (so workers know what to expect), contracts, and transparent pay guides.
  - Enforcing contracts with terms of pay and scope of work clearly outlined, and ensuring that best practices are captured in a company's standard HR practices.
  - Benchmarking for pay and/or increasing transparency around rates and career paths to equip live music workers to advocate for themselves and convey their value.
- **Associations:** An ideal industry has overarching bodies with focused roles on reinforcing and supporting **workforce standards** for live music workers, regardless of whether they are part of a union or not.
  - Look to examples such as United Musicians and Allied Workers (UMAW) (which emerged in the U.S. during the peak of COVID-19) for models of non-union supportive structures.



## Theme 1

# Sector Infrastructure

## What's Required (Cont.)

- **Need for capital:** Access to financing is critical to growing and sustaining an ideal sector. Access to diversified streams of funding would infuse more resources into the industry and help create more (and better) paid work opportunities. The following should be considered:
  - Funds specifically for venues – who are critical to the industry – to help support risk taking in programming, job creation, and training.
  - Connections could be made between the industry and sources of funding beyond public grants – such as the private sector.

## What Was Heard

An ideal industry would foster a more supportive and inclusive culture. Current challenges include:

- **Work/Life Balance:** Working in live music requires workers to be comfortable with “hustle” culture – which comes with elements of flexibility, instability, long days, and in-kind hours – especially leading up to an event or production. Due to the demanding work required, some workers report choosing to be contractors to better control their hours (thus have more control over work/life balance). Contractors' payment works differently than employees – the trade-off is being responsible for deductions and having no access to benefits.
- **Economic sustainability:** It is difficult to achieve a full-time career in live music. Many workers report that they keep multiple jobs, and not all in music. The industry is currently “stretched and

stressed” and the increased cost of living has made working in live music even more of a challenge. Some also contribute hours beyond their work on-site, that does not always get captured in compensation.

- **Seasonality:** Some workers note that live music work (especially in festival circuits) is seasonal – meaning there is a lot of downtime and periods of limited work.
- **Access to opportunities:** Live music often operates on a ‘who you know’ basis; access to opportunities, training, and mentorship is reportedly tied to knowing someone already in the industry. This dynamic makes it hard not only to become a part of the industry, but also to implement and preserve equity, diversity and inclusion principles across the sector. Equity, diversity, and inclusion challenges in the industry extend beyond access – see [Closing the Gap](#) for more detail.

## Theme 2

# Supportive & Inclusive Culture



## What's Required

Key areas to help nurture a supportive and inclusive industry include:

- **Better work/life balance:** Increasingly demanding working conditions are causing workers to exit the industry. Following the pandemic, many workers now emphasize the importance and value of work/life balance. As such, talent retention will require more balance. Some initiatives to consider include:
  - Increasing visibility (e.g., public job board) and access to opportunities (openness and transparency around opportunities).
  - Exploring methods to reduce or compensate people for in-kind hours.
  - Explore methods to support working parents.
  - Looking to best practices from other sectors with similar contractor dynamics.
  - Look to the [Tourism Workforce Sustainability Framework](#) created by TIAO, which seeks to create better conditions and balance for tourism workers.

- **Mental health support:** Due to the inherent hustle culture in the industry (which can cause burn out), increasing focus on employee well-being and mental health support is critical for those in the industry. Employers could support by:
  - Amplifying existing resources for industry workers, such as those offered by [Unison](#), and resource pages on venues and associations (see [CIMA resource list](#)), to increase awareness and normalize mental health support.
  - Considering mental health needs of employees and contractors when negotiating employee benefits and compensation.
- **Leadership support:** Systemic change needs to start from the top. Training and support for those in charge in terms of inclusive practices, supporting mental health and supporting staff in ways they need would be a valuable way to start.

## Theme 2

# Supportive & Inclusive Culture



## What's Required (cont'd)

- **Inclusion:** An ideal sector would include policies and programs that support an inclusive sector, such as:
  - Ensuring inclusive accommodations for individuals with disabilities.
  - Boosting programs that encourage and support diversity in the industry, and support people once they are working in it.
  - Implementing and reinforcing mentorship programs so individuals are supported once in the industry.
  - Encouraging safe spaces at venues/festivals/job sites.
  - Setting industry-wide diversity goals so that these programs become more than just a “check box”.

## Theme 2

# Supportive & Inclusive Culture





## Theme 3

# Path for Career Growth

## What Was Heard

Having a clear trajectory and opportunities for development is important to job retention, job fulfillment, and feeling equipped for success. It is felt that opportunities for career growth should span all career levels from emerging to established workers. The following challenges around advancing careers were noted:

- **Entrepreneurship:** Many in the industry are working as entrepreneurs – often as freelancers or sole proprietors. However, entering the business side of the industry can be difficult to navigate. Currently, those finding success have had to be resilient and proactive in searching for information.
- **Skill gaps:** There are key business skills gaps in the industry, including both soft skills (e.g., networking, negotiation, marketing, pitching) and certain hard skills (e.g., taxes, accounting, grant writing).
- **Industry shifts:** Having training opportunities is important for all music

workers, as the industry is quite dynamic, and thus difficult to keep up with. With new technology and ways of working changing the landscape, live music workers feel they must keep abreast of new shifts, but do not always know how to do so. Many also report a need for ongoing training around safety.

- **Accreditation:** Working in live music (specifically A/V) requires technological know-how. However, the lack of standardization across training and equipment in venues makes it difficult for new entrants to be skilled for all jobs.
- **New entrants:** Transitioning to work in live music from other industries can prove challenging. Some report barriers around adopting industry jargon and figuring out how to navigate the complexities of the industry.



## Theme 3

# Path for Career Growth

## What's Required

In creating improved pathways for career growth, there are two priority areas.

- **Support for Entrepreneurs:** More support is required to enable the success of entrepreneurs in the industry, such as through:
  - Offering business skills training, including soft skills and hard skills. Such training could be developed by post-secondary schools, associations, and municipalities working with city-run Business Centres and other partners to develop and deliver creative industry specific training (e.g., [Music Managers Forum](#), etc.).
  - Coordinating workforce and skill development efforts. In doing so, the industry could look to inspiration from labour and workforce initiatives from Tourism Industry Association of Ontario's ([TIAO](#)) in better streamlining and

connecting tourism and hospitality workers to existing training resources (e.g., through [Tourism Skillsnet Ontario](#)).

- Hosting bootcamps or incubators catered to music entrepreneurs – which could be explored at local levels by municipalities. The City of London's [Artist Entrepreneur Bootcamp](#) in partnership with Canada's Music Incubator could serve as inspiration, although scaled for music workers rather than (only) artists.
- Building awareness of and access to seed funding opportunities and one-on-one business development support (e.g., assistance with business plans and pitching to investors) often offered through City business centres and economic development, and incubators.



## Theme 3

# Path for Career Growth

## What's Required (cont'd)

- **Professional Development:** There is a need for ongoing access to training and guides. Examples of initiatives include:
  - Ongoing safety training (provided through unions or industry associations) as working in live settings come with workplace hazards. Training opportunities need to be held varying times of day to increase access.
  - Toolkits to help live workers navigate the industry, such as “how to” guides on how to run a festival/event. Such toolkits could be developed by associations or arts councils.
  - Guides to help streamline artist and vendor/event organizer relations (e.g., outlining information needed when booking a show), which could be developed by associations working alongside venues.

## What Was Heard

Fostering a strong talent pipeline is integral to creating a sustainable industry. Emerging live music workers need to be well-trained and ready for the workforce. The challenges noted around workforce readiness include:

- **Issues with entry:** There are several young, eager workers looking to make their start but not able to land opportunities. The reason is often because employers are in search of experienced workers to fill much-needed positions. Junior talent require training, which requires time and investment that some employers do not have.
- **Labour gaps:** There is limited data on precisely where the labour shortage gaps lie. An ideal industry knows where those gaps are, what skills are needed, and can connect and train talent to fill those gaps.

- **Limited hands-on experience:** Schools equip students with foundational knowledge, but do not always produce job-ready individuals. Employers note that more hands-on experience is required for students to be made workforce ready.
- **Formalized training:** Formalized training does not exist for all jobs across the live music ecosystem. For example, event programmers play an important role in the industry but these positions are often filled by people who are not specifically trained for it, and/or take on this role later in their career, after working in various other positions across the live music sector.



## Theme 4

# Workforce Readiness



## What Was Heard (cont'd)

- **Risk:** Employers are hesitant to take on a new employee with limited experience, but emerging workers cannot gain experience without a job. Limited safety nets can make industry newcomers wary and puts employers in a difficult position (especially when expensive equipment is at stake).
- **Recognition:** There is limited recognition of the value of those working in behind-the-scenes roles, and limited formal discussion around all the various career paths possible in music (particularly for those just starting out). There is also limited awareness of all the available jobs in live music, or how to get into the industry.
- **All-ages:** Given age restrictions common in the industry, some workers indicate that emerging professionals are limited in progressing their career. For example, many venues will not allow workers under 19, meaning high-school aged junior workers can have difficulty exploring the industry as a potential career path.
- **Representation:** A lack of diversity and representation in live music education was noted as a barrier to pursuing careers in the industry (especially in audio technology). Finding ways to support more representation, address the misogyny in the industry, and promote the visibility of equity-deserving groups in the sector could open opportunities for marginalized workers and create a more inclusive and diverse industry.

## Theme 4

# Workforce Readiness



## What's Required

The following areas are required to better shape a ready workforce.

- **A pulse on the skills gap:** There is a need for more connection between industry associations and post-secondary schools in examining the state of the live music industry (in terms of what skills/positions are required) so that the training provided at post-secondary schools more readily churns out what the industry needs.

**“To address the labour shortage in the live music sector, it is crucial for the industry to deepen connections with post-secondary institutions. By directly conveying key skills to educational institutions, the industry can contribute to defining curriculum and ultimately produce better-prepared graduates.”**

- Colin Mills, Professor and Program Coordinator, Music Industry Arts, Media Studies, Algonquin College

- **Classroom to industry training:** More opportunities are needed to better equip students for industry work. Possible initiatives include:
  - Providing hands-on training in high schools and post-secondary schools in connection with venues and other industry partners. This training would provide students with industry and the opportunity to build their networks through mentorship opportunities, co-ops, and experiential learning opportunities.
  - Establishing curriculum guidelines at post-secondary levels with direct input and assistance from major employers, venues, and/or sector advisory councils to better develop courses that respond to key industry skills required.
  - Ensuring there are all-ages opportunities to expose students to the industry at younger ages (e.g., high school levels). Doing so could be the joint role of municipalities and associations.

## Theme 4

# Workforce Readiness





## What's Required (cont'd)

- Amplifying and creating more mentorship opportunities and accelerators for live music workers from marginalized communities (e.g., [Women in Music](#), [BDRB](#)).
  - Advancing actions laid out in [Closing the Gap](#) can help create equitable opportunities that build diversity in the sector (e.g., paid mentorship programs, adopting a 'more than one rule', etc.)
- Ensuring there is adequate representation among faculty at post-secondary institutions so students from diverse backgrounds see themselves reflected in the industry.
- Strengthening intern and volunteer matching programs (e.g., those offered by arts councils and municipalities) to connect prospective workers to existing opportunities, and further promoting federal programs (e.g., Canada Summer Jobs).
- Providing paid training and apprenticeship programs to ensure there are sustainable opportunities for those wanting to get into the industry. Amplifying and supporting the creation of such opportunities could be the responsibility of industry associations.

- **Incentivization for training/ opportunities to junior employees:** There is a need to encourage employers to give opportunities to early career workers. Training impacts the employer and incurs costs and time. As such, methods to entice the hiring and training of junior staff should be explored. For instance, municipalities could be conduits to explore and connect the industry with opportunities to help offset training costs.
- **Awareness of career pathways:** Associations and training institutions should enhance the promotion and education of potential career paths in music to students pursuing music programs (through post-secondary institutions), as well as professionals from other industries who may be interested in entering the industry. There is a need to advocate and showcase that a career in the music industry (not just performance) is viable and valuable.

## Theme 4

# Workforce Readiness



## Theme 5

# Connection & Communication

## What Was Heard

A thriving live music workforce is one that is well-connected, well-informed through open lines of communication, and is inviting to all prospective industry workers. Challenges mentioned regarding connection and communication include:

- **Relationships:** Building relationships is critical to carrying out a successful career in live music, as so much hinges on inner networks. Currently, the industry can seem fragmented, siloed, and exclusive. For instance, certain fields that are more male-dominated (e.g., A/V) can feel closed off for marginalized groups.
- **Awareness of opportunities:** Not everyone has clear visibility on all the job opportunities and training available in the industry – especially new entrants.
- **Collaboration:** Increased collaboration and idea sharing has occurred more during the COVID-19 pandemic out of necessity. This

level of connection and collective problem solving was helpful in navigating industry wide challenges.

- **Promotion:** A well-connected workforce is not only connected to itself but to its audiences. Reaching audiences can be a particular pain point for many live music workers, particularly those working in smaller venues and events who often have less funding available for promotional efforts.

## Theme 5

# Connection & Communication

## What's Required

To increase connection and communication, the following areas are required:

- **Opportunities for collaboration, connection, and information sharing.**

Some potential initiatives include:

- Enhancing networking opportunities to connect workers to each other (face-to-face) and ongoing career opportunities. For instance, more regular, informal meet-up opportunities at local levels (e.g., through industry associations, municipalities, or local organizations).
- Ongoing open channels of communication among live music organizations to tackle system-wide challenges together, and building relationships outside of the industry (e.g., with tourism organizations, and adjacent creative industry sectors).

- **Increased visibility and awareness:** More sightlines within the industry and awareness of career and professional development opportunities are required, such as by:
  - Amplifying awareness and access to existing training opportunities in the industry through relationships and partnerships with music journalism outlets.
- **Opportunities for exposure and portfolio building:** Create more opportunities to connect those looking for work with available opportunities. Some examples of potential initiatives:
  - Hosting career fairs (targeted at entry level workers) to showcase career paths and allow employers to connect with emerging professionals. These fairs could share opportunities across all creative industries, and could be a joint effort by post-secondary institutions, municipalities, and associations.



## Theme 5

# Connection & Communication

## What's Required (cont'd)

- Holding expositions, which are currently offered by some municipalities, to help music professionals at all levels of their career find new opportunities and expand their network. Expositions could also provide an opportunity for freelancers to promote their services in the industry.
- Culture exchange programs that would allow music professionals and artists to visit and work in other communities, expand networks, and grow audiences. Such a program could be run between partnerships with sister cities.
- **Promotional assistance:** There is a need to support and help promote smaller events and venues, who help contribute to the vibrancy and diversity of local live music scenes. Such as by:
  - Boosting visibility of small events and venues in tourism communications at local levels (e.g., tourism arms in municipalities)
  - and more coordinated efforts at provincial levels (e.g., through organizations such as the Tourism Industry Association of Ontario ([TIAO](#))).
  - Increasing awareness of event listings among organizers and audiences alike, which could be the role of tourism organizations as well as industry associations.



A black and white photograph of a musician's feet on a pedalboard. The musician is wearing light-colored pants and sneakers. The pedalboard is filled with various effects pedals, including a wah pedal and several distortion or overdrive pedals. The background shows a drum set and other stage equipment. A black rectangular box is overlaid in the center of the image, containing the word "Conclusion" in white, bold, sans-serif font.

# Conclusion

# Conclusion

In exploring the labour shortage in Ontario's live music sector, this report summarizes the salient challenges facing live music workers, and aims to identify areas of improvement to create a healthier, more sustainable workforce.

Challenges facing the live music sector include:

- Ensuring safe and inclusive working conditions
- Facilitating work/life balance
- Increasing access to opportunities
- Accessing formalized training
- Building awareness of opportunities

Improving sector infrastructure, encouraging a supportive and inclusive culture, supporting paths for career growth, ensuring workforce readiness, and facilitating connection and communication among the industry and its audiences together create the conditions needed to strengthen Ontario's live music workforce.

Research revealed several nuances related to the labour shortages in the live music industry. For instance, there are systemic challenges that are contributing to skills gaps and issues connecting workers with opportunities. Overall, this research reveals that challenges in the industry may go beyond labour shortages – as such, envisioned solutions need to be more multi-faceted and collaborative.

Advancing on these areas is a shared responsibility across the ecosystem, involving the cooperation and coordination of city governments, associations, major employers in the industry, post-secondary institutions, among others.

