



CONNECTING OTTAWA MUSIC

A PROFILE OF OTTAWA'S MUSIC INDUSTRIES



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This report was authored by Andrew Vincent and Ian Swain on behalf of the Ottawa Music Industries Consortium. Led by Kelp Records (Kelp Music), the Ottawa Music Industries Consortium is a small group of local music organizations committed to growing the capacity of the Ottawa-area music industries. Other members of the Consortium include The Audio Recording Academy (TARA) and L'Association Professionnelle de la Chanson et de la Musique (APCM). For more information about this report, contact Jon Bartlett at jon@kelprecords.com.

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Ottawa Music Industries Consortium



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Cover photo: Ming Wu (HILOTRONS, Arboretum Festival)

EXECUTIVE SUMMARY

When you say, "I'm going to Austin," or, "I'm playing in Austin," people are like, "Cool. That's a music city." I think Ottawa definitely has the potential to be that city. ~LUKE MARTIN, CAPITAL REHEARSAL STUDIOS~

Ottawa has the potential to be a music city and one of Canada's most important music hubs. It has a rich music history. It is home to thousands of talented musicians. It has dedicated music entrepreneurs, established music institutions, and emerging music scenes.

But Ottawa is missing infrastructure and knowledge to help it connect and develop its considerable music assets. The result is that Ottawa is failing to realize its potential as a music city and missing out on significant cultural and economic benefits in the process. Ottawa may also be falling behind other cities in the province and across the country that have recognized music as an economic driver and are acting to encourage music.

Several Ontario municipalities, including Hamilton, Kitchener-Waterloo, London, and Toronto, have recently launched music industry initiatives to help grow grassroots music industry activity. These initiatives leverage the Province of Ontario's music strategy and recent major investment in music through the \$45 million Ontario Music Fund, acting on research that highlights music's role as a catalyst for local economic development. And they tie into a global trend towards municipalities as the level of government best equipped to drive policy on the music industries.

Music has arguably never been more important for cities than it is today. The experience of Austin, Texas—a government and university town roughly the same size as Ottawa—shows the effect that music can have on a city. Over the past thirty years, Austin's music entrepreneurs, business groups, and municipal government have worked together to make music the centrepiece of a \$4.35 billion creative sector that continues to grow. Today, Austin's music industries generate \$1.6 billion in economic output and 18,000 jobs, and music is a catalyst for tourism, talent recruitment, and a range of other benefits.

This report is a first step in looking at how Ottawa can better cultivate the potential of its music industries. Commissioned by a small group of Ottawa music organizations, funded by the Province's Ontario Music Fund, and supported by goals of the City's "Renewed Action Plan for Arts, Heritage and Culture (2013-2018)", this report is targeted to a broad audience and contains recommendations both for the local music industries and the City of Ottawa.



GOALS

This report seeks to do four things:

1. Explore the case for music industries playing a key role in the Ottawa region's larger creative industries and economy.
2. Develop a profile of the local music industries, describing their important elements and gauging development as benchmarked against comparable Canadian cities.
3. Identify the strengths and weaknesses of, and opportunities for, the local music industries.
4. Provide recommendations to support the growth of Ottawa's music industries.

To deliver on these goals, this report undertook the following:

1. A review of literature on music and cities and the development of creative industry clusters.
2. An online survey targeting the region's musicians and music businesses.
3. Approximately 25 semi-structured interviews with members of the local music industries.
4. A data-driven benchmarking exercise measuring Ottawa's music industries against its peer cities.

FINDINGS

The report's findings can be summarized as follows:

1. Ottawa is home to an exciting level of new and established musical activity.

- a. In a two-week period, over 800 musicians and dozens of businesses responded to this project's online survey.
- b. There are more than 2500 composers registered to collect songwriting royalties in the Ottawa area.
- c. 76% of part-time musicians are focused on making music a full-time career.
- d. There are signs that musicians and music entrepreneurs are choosing to stay in the city rather than move away to larger industry centres. This is creating important opportunities for new growth.

2. Ottawa is missing key infrastructure and knowledge to take advantage of this activity.

- a. In a combined ranking of numbers of musicians, music businesses, and live venues, *Ottawa finished* last out of the six Canadian cities of comparable size—Ottawa, Hamilton, Winnipeg, Calgary, Edmonton, and Québec City.
- b. Ottawa has few of the key types of music companies (e.g. labels, publishers, managers and agents) that develop local talent and connect the city to national and international networks. This shortage of core music companies is also translating into a general lack of local knowledge about how the music business works.
- c. Ottawa's lack of established labels, management companies, and publishers puts the city at a disadvantage in attracting funding for music company development. While Ottawa's music festivals are outperforming in live music funding per capita, the city dramatically underperforms in music company development, earning less than 1% of what Toronto-based independent music companies did in the 2013-2014 Ontario Music Fund. Few local companies apply— or are even eligible.
- d. Ottawa lacks local representation to bring the industries together. The three top cities in the benchmarking—Winnipeg, Calgary, and Edmonton—are all home to provincial music industry association offices that connect local industries to larger networks and mentor local musicians and music businesses. Ontario's provincial association, MusicOntario, is located in Toronto.
- e. Those in the Ottawa music industries are poorly positioned to share industry knowledge and advocate for common interests. There is a sense among many that the local industries are disconnected from each other.



RECOMMENDATIONS

Ottawa's music industries face other obstacles, including few high-quality mid-sized venues and the lack of a dedicated citywide arts publication, such as an arts weekly. But our findings suggest the most immediate opportunity for action is to address gaps in industry knowledge, connections, and advocacy. This report recommends the following be undertaken immediately:

- 1. Local music industry leaders should form a permanent organization**—a local music industry association—with a mandate to increase knowledge-sharing, improve the industry's connections to Ottawa's broader business communities and the global music industries, and advocate for common interests to various levels of government.
- 2. The City of Ottawa should undertake development of an official music strategy** in collaboration with members of the local music industries. The strategy should outline the steps of an action plan for growing the local music industries, including metrics for measuring success. In advance of that strategy, the municipal government should make music one of its priorities for economic development.
- 3. The City of Ottawa should immediately assign a point person for the music industries.** This staff person would be a centre of expertise and act as a pipeline of information from the industries to the City, and vice versa.

SETTING THE SCENE: IT'S A THURSDAY NIGHT IN OCTOBER.

You take a look at ottawashowbox.com, one of the local online sources of event listings that has emerged since the city's last alternative arts weekly folded in 2012, and then check CBC radio's website for music journalist Jessa Runciman's recommendations. It turns out there is no shortage of live music options in the Capital.

That night you might go to Raw Sugar, a small licensed café in Chinatown, to hear singer-songwriter Kalle Mattson, a Sault Ste. Marie native who moved to Ottawa for university and recently signed to an imprint of large Vancouver-based label Nettwerk Records. Or you could walk a block down the street to the Daily Grind to hear Craig Cardiff, a Juno-nominated roots artist and partner in a growing Ottawa music services agency. In the Byward Market, a local singer-songwriter is opening for a band from Chicago at Zaphod's, and there's Reggae Night with Roots Movement at legendary blues bar The Rainbow. Walk down Rideau Street to Mavericks and Ottawa's largest independent concert promoter, Spectrasonic, is putting on a show with a local hardcore band, while upstairs at Café Dekcuf, Black Widow Productions is presenting a night of heavy metal featuring local and U.S. acts. Travel across the river to Hull and local art rockers Bonnie Doon are playing with a band from Hamilton at Le Temporaire, an improvised show space, while in Old Ottawa South, House of TARG, a venue with dozens of vintage pinball machines is the scene for the first night of a new music festival called Ottawa Implosion. Travel outside the downtown core and you can see Canadian pop act LIGHTS performing at the Algonquin Commons Theatre; or attend the first night of Merrickville's annual Jazz Fest; or visit Wakefield where an instrumental group from San Francisco is appearing at one of Canada's most beloved venues, the Black Sheep Inn.

But even this only covers some of the live music options available on a single night in the Ottawa area. Not mentioned are the Québécois singer-songwriters at the National Art Centre's fourth stage, the local hip-hop DJs at Babylon, or the countless open mic nights and cover bands at neighbourhood pubs.

Reviewing the exhaustive list of live music on a single night in the Ottawa area provides clues to why music is so important. It not only creates jobs for musicians, sound technicians, security personnel, bar staff, etc., it also creates opportunities for people to meet, socialize, participate in culture, experience different neighbourhoods, and see the city as an exciting place to live and to visit. As these listings show, music is also a critical way in which Ottawa connects to other cities in Canada and beyond, creating important pathways for cultural and economic exchange.



Posters outside Spaceman Music

1.0 INTRODUCTION

There's something really special about our city, you can create your own markets, you can do your own thing. But the bigger question is, how do we bring everybody together? -MICHAEL DUBUE, MUSICIAN, HILOTRONS/SOUND TECHNICIAN-


There is a significant amount of music industry activity in Ottawa, from mainstream and commercial to independent and underground. Some of this activity is extremely visible, such as RBC Bluesfest, ranked by Billboard Magazine as one of the top ten music festivals in the world,¹ or performances by the National Arts Centre Orchestra. But even most commercial musical activity happens on or just below the surface, in smaller scenes and spaces, and is seen primarily by those who already know where to look. While this smaller-scale activity is less visible, and perhaps less well-known to the broader public, it is also where much of the energy of Ottawa's developing music industries occurs.

One thing that seems to characterize the Ottawa-area music industries is the lack of middle ground between these two scales of activity: one is highly visible, receiving government funding, and connected to national and international industry networks; the other is partially hidden, struggling to find sources of funding, and connected mostly by word-of-mouth and social media networks. The lack of connections between the two can be seen in the small numbers of Ottawa-based brokers (e.g. publishers, managers, bookers), advocacy organizations, and mid-sized venues.

And so, one of the greatest challenges in developing Ottawa's music industries is finding ways for emerging local musicians and music businesses to develop and bridge these scales of activity: in particular, how to connect to national and international industry networks while remaining based in the area.

Our research suggests that Ottawa is an excellent place to get started in music. The Ottawa music community is supportive, without the competitive pressures found in major industry centres like Toronto. The city's education institutions, smaller venues, campus radio stations, music instrument and record stores, rehearsal and recording studios—they all combine to form a supportive music ecosystem.

This type of supportive atmosphere is crucial to having a viable local music industry. It has been one of the important draws of cities like Halifax² as a place for musicians to settle. But Halifax has also been far more successful than Ottawa at exporting local music and branding itself a music city. It has a well-known showcasing festival (Halifax Pop Explosion), a strong provincial music association located in the city, strong print and online arts and culture publications, and a sense locally, regionally, and nationally that music is a core element of the city's culture. These are all key factors that contribute to Halifax's success as a music city, and which are currently lacking or non-existent in Ottawa.



Another characteristic of Ottawa’s music industries is the existence of largely separate French and English music scenes. Operating within a smaller and more defined market than the English industries, those in the Franco-Ontarian industries have created their own institutions and networks to help musicians working in French develop as professional artists and find audiences for their music, including a bi-annual music award ceremony (Gala des prix Trille Or) and an annual showcasing festival (Contact Ontario). Indeed, Ottawa is the industry hub for Franco-Ontarian music, but this fact seems to be under the radar outside the French-speaking community. While there are Franco-Ontarian musicians who work in both English and French, and who have been building bridges between these scenes, there is far more potential for those in both music scenes to learn from, collaborate with, and support each other.

This theme of disconnected scenes and stakeholders ran through several of the interviews with local industry leaders, and it is one of the main weaknesses of Ottawa’s music industries. The Ottawa ecosystem can be seen as divided along a number of lines, including scale, genre, language, neighbourhood, access and attitude to government funding, and personal/professional affiliations. Certainly, such divisions are present in any local music environment. But it is notable that this theme recurred in many conversations and survey responses. Clearly, there is a major opportunity in finding ways for those in the Ottawa music industries to come together, learn from each other, and work together to increase the visibility and viability of local music in various ways.

This report is a first step in looking at how Ottawa can better cultivate the potential of its music industries. Part profile, part study, this report:

- Describes the sub-sectors of the local music industries;
- Outlines general findings on the strengths and weaknesses of the local industries;
- Benchmarks Ottawa’s industries against other Canadian cities of a comparable size; and
- Provides recommendations for how to move forward.

The report also includes the beginnings of a local music directory, included as Appendix D.

While this project attempts to include as much activity as possible, it is just a beginning. More research is needed on the economic impact of local music-making, as well as on underrepresented genres, scenes, and neighbourhoods. There is an amazing amount of musical activity in the Ottawa area. We hope this is a useful start at making that activity more visible.

SOMETHING IS HAPPENING IN OTTAWA

Was 2014 the greatest year in music for the Ottawa area? If the measures are quantity, diversity and overall quality, then the answer may well be yes. It's tenable to suggest that more new music was created and released by Ottawa-area acts this year than in any previous year. New releases came from bands and musicians in the National Capital Region almost daily, to the point where being familiar with all of it is practically impossible. ~ PETER SIMPSON, OTTAWA CITIZEN ~

There is a sense that something is happening in Ottawa's music industries. Along with the number, quality, and diversity of new releases in 2014, other signs that it is an exciting time for music in the National Capital Region include:

The launch of new and expanded spaces for music. These spaces, such as Capital Rehearsal Studios, located in the revitalized City Centre complex off of Scott Street, the House of TARG, a live music venue/pinball arcade in Old Ottawa South, and the Record Centre, a record store on Wellington Street that features live music (to name only three of several examples) are creating new opportunities for area musicians and music fans to connect.

New sounds from the National Capital Region. The recent success of local electronic artists A Tribe Called Red is showing that Ottawa can be a source for new musical genres that resonate with audiences around the world. Small, underground record labels like E-Tron and Bruised Tongue are supporting the development of local non-mainstream artists that have the potential to build a name for Ottawa as a hotspot for exciting new music.

Local music businesses are growing to meet the needs of artists and entrepreneurs. Artist services agencies such as Partick Artists and You Rock Red are providing artist consulting services; Kamp Operations, an event coordination company with expertise in volunteer and security operations, is helping Ottawa's festivals manage growth; Postering Ottawa is helping promoters and artists get the word out about live music events; and Bluesfest has continued to expand its industry footprint, most recently hosting a series of music industry information sessions at its new "Festival House" headquarters in Westboro.

People are documenting the history of local music. Two books on the history of Ottawa music are currently being written. Local fans and musicians have begun to share their own online histories of local music, and this year, House of PainT, Ottawa's annual festival of hip-hop culture, featured a panel tracing the roots of hip-hop in the capital.

People are talking about the future of local music. From standing-room only panel discussions about Ottawa's strengths and weaknesses as a music city (Why I Left Ottawa at this year's Arboretum Festival) to the emergence of new print and online music publications (e.g. ottawashowbox.com, Small Talk) people are talking about music, and how to support music, in the National Capital Region.

The City of Ottawa is taking notice. Building on the priorities of Ottawa's *Renewed Action Plan for Arts, Heritage and Culture* (2013-2018), the municipal government's Cultural Development department began bringing together members of the music industries in 2013, forming a music industries working group to discuss opportunities for growth. Most recently, in December 2014, Ottawa's Mayor announced the launch of #ottmusik, an initiative to replace the on-hold music on the City's 3-1-1 service with the original work of Ottawa musicians.

These are all encouraging signs that music is coming to play a larger role in how Ottawa imagines itself as a city. But more work is needed to ensure that Ottawa benefits from this surge in music activity.

2.0 BACKGROUND

I would like to think Ottawa is evolving to the point it is now. In my opinion, it has a stronger music-based community than ever. We're at a point in time where we can choose to go a few different ways and develop—use the more mature groups, or companies, within that scene to move it forward or just sort of sit around and dawdle. ~ MARK MONAHAN, EXECUTIVE DIRECTOR, RBC BLUESFEST ~

This project builds on a growing body of research exploring the connections between music scenes, industries and cities. While the theme of illegal downloading and declining album sales has dominated much of the story about the music industries over the past 15 years, the music industries, broadly defined, have arguably never been larger or more important at the local level.

Since the 1980s, cities like Sheffield, UK and Austin, Texas have incorporated music as a key part of economic development strategies, in some cases replacing lost manufacturing capacity, in others fostering connections between live music, tourism, and convention activity. More recently, Canadian cities such as Hamilton have seen that local music scenes are instrumental to downtown redevelopment,⁴ and have taken steps to implement Council-approved music strategies.⁵ These efforts are supported by academic research that has examined connections between creative activity and economic development at the municipal level.⁶

This research also builds on initiatives being undertaken by the City of Ottawa. A *Renewed Action Plan for Arts, Heritage and Culture (2013-2018)* officially recognizes the role of arts and culture in driving “major economic impacts, social benefits, and positive environmental effects” and has laid out a set of Council-approved strategies that include investing in local culture and supporting cultural exports. Invest Ottawa has also contributed to profiling the city’s creative services sector, demonstrating links between the local film and television industries and the growing digital media and gaming sector.

While the Invest Ottawa profile establishes a foundation for the collaborative activity that is at the heart of creative industries work, it is notable that music is not included as one of those industries. This may be because, unlike film and television, the music industries do not have the equivalent of a “Music Office” or other locally-based advocacy organization. The result is that much of the area’s musical activity goes unseen and unmeasured. We hope this report is a first step towards changing this.

TEAM

This project was conducted on behalf of the Ottawa Music Industries Consortium by the small research team of Andrew Vincent and Ian Swain with support from Rachel Weldon, Lesley Marshall, Melissa Kaestner, and Ira Wagman.

The Ottawa Music Industries Consortium is a group of local music organizations led by Kelp Records (Kelp Music), whose members include L'Association Professionnelle de la Chanson et de la Musique (APCM) and The Audio Recording Academy of Ottawa (TARA). The consortium came together following a Music Industries Town Hall organized by the City of Ottawa's Cultural Development and Initiatives Department in the fall of 2013.

This report received funding from the Ontario Media and Development Corporation (OMDC) through the Ontario Music Fund (OMF) and supports the OMF's goals of driving "activity and investment and to support Ontario's music companies and organizations in expanding their economic and cultural footprints within Canada and around the world."⁸

GOALS

The goal of this report is to provide information and analysis that will lead to the further growth of Ottawa's music industries in a way that benefits the region's musicians and music entrepreneurs, and which supports Ottawa in its continuing development as a vibrant and creative city in which to live and work.

To deliver on this goal, this report seeks to do four things:

1. Explore the case for music industries playing a key role in the Ottawa region's larger creative industries and economy.
2. Develop a profile of the local music industries, describing their important elements and gauging development as benchmarked against comparable Canadian cities.
3. Identify the strengths and weaknesses of, and opportunities for, the local music industries.
4. Provide recommendations to support the growth of Ottawa's music industries.



Catriona Sturton at Raw Sugar
(Photo: Ming Wu)



The Audio Recording Academy
(Photo courtesy of TARA)



Rolf Klausener at #Ottmusik launch (Photo: Ming Wu)

METHODOLOGY

To capture the broad range of activity that makes up the music industries at a local level, this project used a mixed-method approach combining quantitative and qualitative research methods.

The core research components of the project were:

- An online survey targeting the region’s musicians and music businesses
- Approximately 25 semi-structured interviews with members of the local music industries
- A data-driven benchmarking exercise measuring Ottawa’s music industries against its peer cities

These components were supported by a review of literature on music industries and cities, internet research on local music businesses, and ethnographic research gathered by attending music events, talking to members of the local music industries in informal settings, and documenting “on the ground” evidence of music in the city.



CITY PROFILE

Ottawa is Canada's national capital and Ontario's second largest city with almost 900,000 residents. Together, the metropolitan area of Ottawa-Gatineau—a single economic region that spans the provincial border—is home to 1.31 million residents, putting it neck and neck with Calgary as Canada's fourth largest metropolitan area after Toronto, Montreal, and Vancouver. Since 2006, Ottawa has grown at a rate of 8.8%, putting it substantially ahead of Canada's overall population growth of 5.9%.⁹ Projections put the population of the City of Ottawa proper at almost 1.2 million by 2021.¹⁰

Ottawa is home to over 100,000 federal government employees, as well as almost 2,000 technology companies with combined employment of approximately 75,000.¹¹ Along with two major research universities and two colleges, this employment profile has made Ottawa the most educated city in Canada with 61% of workers having at least one post-secondary degree.¹² The Ottawa region is tied with Boston for the highest concentration of PhDs in North America. Forty-six percent of Ottawa residents are employed in creative problem-solving jobs like software engineer, doctor, and musician, one of the highest rates in the world.¹³ Indeed, the region's greatest resource is its high concentration of smart, creative people—a major factor in the Ottawa's recent top ranking of global cities by the Martin Prosperity Institute.¹⁴

The city's largest cultural assets include the National Arts Centre, the National Gallery, and the Canadian Museum of History—major institutions whose mandates are focused on connecting national rather than local and regional culture. There is a strong festival culture, and Ottawa was recently named Ontario's best festival city (cities larger than 200,000).¹⁵ Ottawa-Gatineau also stands out for its parks, large in number and sizeable in volume. Many parks on both sides of the provincial border are operated via the national mandate of the NCC.

Ottawa supports the arts through a range of services including operating theatres and performance spaces, funding investments in festivals and non-profit arts organizations, and through its Creation and Production Fund for Professional Artists.¹⁶ In a recent comparison of cultural investment per capita, Ottawa ranked fourth in Canada behind Montreal, Vancouver, and Calgary. Ottawa invested \$28 per capita in 2009 while top-ranked Montreal invested \$55 per capita.¹⁷ Unlike Hamilton,¹⁸ Toronto,¹⁹ and London (Ontario)²⁰, Ottawa's cultural and economic plan doesn't yet include a music industries strategy.

In recent years, Ottawa has been making major investments in infrastructure, most notably the building of the Confederation Line, a light rail transit system that will launch in 2018. In 2017, the national spotlight will be on Ottawa as the focal point of Canada's 150th birthday celebration.

3.0 FINDINGS

We're at a state in this city where something is going to evolve very quickly... I don't know that we'll break into an A market, but we're definitely starting to emulate the A markets of the early 2000s.

~ ALBERT PORTER, CO-FOUNDER AND CEO, KAMP OPERATIONS~

1. There is a lot of musical activity in the Ottawa area.

More than 800 musicians and 60 music businesses responded to an online survey distributed by the consortium members through their promotional channels. The rate and speed of response (more than 500 responses in the first two days) confirms that Ottawa has an engaged music community.

There were more than 180 local albums released in 2014.

(See the Appendix C for a list of local releases compiled by www.ottawashowbox.com.)

This year, 348 local bands/artists applied to perform at RBC Bluesfest. That number has been growing consistently every year.

"I came here in 2006. There are more opportunities every year." ~ MUSIC ENTREPRENEUR, ONLINE SURVEY ~

2. Ottawa musicians and music businesses are positive about the future.

Asked whether Ottawa was getting better, getting worse, or staying the same as a music city:

- 34% of musicians thought the city was getting better, 41% thought it was staying the same, and 25% thought it was getting worse. The positive impression was strongest with amateur/semi-professional musicians (40%).
- 41% of music businesses thought the city was getting better, 36% thought it was staying the same, and 21% thought it was getting worse.

Most important, there are signs that the "brain drain" of musicians moving to Toronto or Montreal has slowed. Several musicians and music entrepreneurs, most of whom have lived in other places or toured extensively, noted in interviews that they were choosing to stay in Ottawa because it is a place that they can do something new and make a difference.

"A lot of former avid-show-goers have started organizing and promoting their own shows. At the same time, a few new venues have opened up that are owned and operated by people involved in the music community." ~ MUSIC ENTREPRENEUR, ONLINE SURVEY ~



2014 House of PainT Festival

3. The local music industries are home to a wide spectrum of professional and semi-professional activity.

Of the 800+ musicians who responded to the survey:

- 15% defined themselves as full-time professional musicians
- 40% defined themselves as part-time musicians with music as a career focus
- 45% defined themselves as serious amateurs doing music mostly for fun.

Average annual income from music:

- Full-time: \$28,215
- Part-time: \$5,379
- Mostly for fun: \$1,599

Post-secondary music education:

- Full-time: 82%
- Part-time: 54%
- Mostly for fun: 39%

Even those pursuing music “mostly for fun” are still engaged in many professional practices. 26% of “serious amateurs” belonged to SOCAN and 30% had performed more than 10 times in the past year.

It all really comes down to funding ourselves. Building an audience outside of the city means all of the band members having to coordinate missing work or quitting jobs and when you're in the phase where you're still trying to build an audience there isn't much potential to financially be comfortable only making money from out-of-town gigs. ~ PART-TIME MUSICIAN, ONLINE SURVEY ~

4. Part-time Ottawa musicians are pursuing music as a career.

The online survey found that:

- 75% of part-time musicians, those who earn some of their annual income from music, said their other job is intended to support their music careers.
- 77% classified themselves as a musician first and foremost.
- 32% said it was a goal to turn music into a full-time career within the next two years.
- Less than 10% said that their goal was to “Just have fun and see where it goes.”

“My music has been reviewed in the Huffington Post for both releases with rave reviews but it never goes anywhere. I am definitely making some mistakes in moving forward but there is no way to know how I can improve without heavy investment into a publicist and manager.”

~PART-TIME MUSICIAN, ONLINE SURVEY~

5. Ottawa is a great place to get started in music.

Ottawa’s music education institutions, campus radio stations, small-scale venues, festivals, and supportive music community make the region a great place to get started in music.

From the Ottawa Folklore Centre and its tradition of providing instruction from high-level local musicians to college and university music programs taught by industry professionals and Juno-award winners, Ottawa’s education institutions provide great opportunities for developing homegrown talent and attracting talent from outside the city.

Connected to Ottawa’s post-secondary institutions are campus radio stations CKCU, CHUO, and CKDJ, which are critical hubs for connecting new music to people in the city. Several musicians and music entrepreneurs mentioned one or more of these radio stations playing a key role in their discovery of local scenes as well as their development as artists (e.g. providing opportunities to DJ on the air).

While discovering local music scenes was viewed as somewhat of a challenge, interview and survey respondents suggested that, once discovered, Ottawa’s music scenes were accessible and supportive.

I went to Ottawa U. I was studying communications and I worked at CHUO. Working at campus community radio, I met Paul Symes at the Black Sheep, because I would interview artists playing there. He [Paul] booked me to open for Etta James at Bluesfest.

~ALANNA STUART, MUSICIAN, BONJAY/MUSIC JOURNALIST, CBC RADIO 3~

6. Ottawa is missing key types of music businesses to further develop its artists and industries.

While Ottawa has some businesses and institutions that support entry into the music industries, there are few local businesses engaged in professional artist development: businesses like labels, artist managers, bookers, publicists, and publishers.

Only 2 of the 58 music businesses who responded to the English survey, were engaged in “Artist Services (management, booking, publicist)” as their primary business, and only 3 of 58 businesses were listed as Record Labels.

The member directory for MusicOntario, shows the following listings for Ottawa:

- 0 booking agencies
- 1 music publisher
- 2 record labels
- 3 managers/management companies

By way of comparison, MusicOntario’s member directory lists for Toronto:

- 4 booking agencies
- 21 music publishers
- 53 record labels
- 42 managers/management companies

Confirming both of these indicators, our benchmarking showed that Ottawa has the lowest number of core music businesses per capita of any city its size in Canada.

Perhaps most telling, when full-time musicians were asked what would best help them achieve their goals in music, the most popular answer was “Access (or more access) to artist services (e.g. manager, booker, publicist).”

Indeed, of the full-time musicians who filled out the online survey, only 14% had a manager and 10% had a Canadian booking agent.

The present-day lack of a healthy cluster of these types of businesses affects the next generation of entrepreneurs as well: it means a lack of internship and employment opportunities for graduates of the city’s music industry and engineering programs.

“My goals have changed as the small goals were achieved. I just wanted to make a living playing music. Now that that is an ongoing thing, I’d like some help with bookings, publicity, marketing.” ~FULL-TIME MUSICIAN, ONLINE SURVEY~

7. Ottawa is underperforming when it comes to securing available music funding.

One of the effects of the absence, or underdevelopment, of the core music businesses described in Finding #6 is that Ottawa is not benefiting from available funding for music company development.

While Ottawa's music festivals outperformed per capita in the 2013-2014 round of the Ontario Music Fund, the city performed poorly compared to Toronto in the areas of Music Company Development, where Ottawa-area music companies earned less than 1% of what Toronto music companies did.²² This discrepancy is likely because there are few local companies that meet the eligibility criteria for these programs, and therefore far fewer applications coming from Ottawa.

Ottawa also performs poorly in winning federal funding earmarked for emerging artists and companies, distributed through FACTOR, a non-government organization based in Toronto. In the 2013 calendar year, Ottawa area applicants received \$148,000, or \$0.16 per capita. Applicants from Winnipeg, the top mid-sized music city in our benchmarking, received \$403,000 or \$0.54 per capita. However, Ottawa area artists and businesses also submitted over 50% fewer applications than those from Winnipeg.²³

The underdevelopment of Ottawa's core music industries leads to a lack of industry knowledge in the region (which may explain why there are fewer applications), a lack of connections to larger industry clusters elsewhere, and further weakness in landing available funding.

The biggest barrier to getting a music company off the ground might be access to capital. There are a lot of travel grants I've been able to access, which are amazing, but the cost and time you need to put into travel, and floating those costs over months before seeing the grant revenues, are a huge challenge. I had no idea how much travel would be necessary just to get the business to the point of being legitimate abroad, and bring in any kind of predictable revenue stream. ~JON BARTLETT, DIRECTOR, KELP MUSIC/MEGAPHONO ~

8. Ottawa is missing mid-sized music venues.

When asked what would make the biggest difference to Ottawa's music industries, the top answer by a wide margin was "More mid to large size music venues" (33%). Second and third were "More funding for music at the city level" (20%) and "More local media coverage" (17%).

This finding was strongly supported by data from interviews, with many participants noting the decline of Barrymore's as a live music venue and the general feeling that a high-quality mid-sized venue in the 400-600 capacity range is necessary, both for touring artists who otherwise skip the city and for providing a stepping stone to local artists.

Further supporting this finding, when asked what would most help them reach their goals in music, the top response of musicians overall was "Opportunities to play bigger local shows" (29%). Across all three musician types, it was either the first or second choice.

"If you're talking about the city as a whole, the profile of the city, part of the issue is our lack of venues... Ritual is 250 [capacity]. You're going to jump from Ritual at just over 200 to 800 at Bronson Centre. I was talking to [a national booker] about it and he said, "I hate booking in Ottawa. I don't know where to put my bands."

~ROLF KLAUSENER, MUSICIAN, THE ACORN/ARTISTIC DIRECTOR, ARBORETUM FESTIVAL ~

9. Ottawa is missing a weekly arts and culture publication.

Another key institution that musicians and music entrepreneurs feel the city sorely needs is a weekly arts and culture publication. Ottawa X Press, the city's last general arts and culture publication, folded in 2012.

While respondents were quick to praise the online and print publications that have sprung up on the scene over the last few years, there is also a strong sense that a weekly print publication with broad distribution and accessible format is needed to connect local music and small business to a wider audience across the city.

While print publications may seem like an anachronism in the digital age, today's weekly art and culture newspapers are only the most visible component of a multi-pronged strategy: print, web, mobile, events. Similarly-sized Canadian cities continue to support free local weeklies, from Edmonton (*Vue Weekly*) to Calgary (*FFWD*)* to Hamilton (*View*).

"There needs to be more conversations and information about the music scene here in Ottawa. Blogs and independent news sources are great but often I feel they only reach the people that are already aware of what is happening on the music scene." ~ SURVEY RESPONDENT ~

*It was recently announced that after almost 20 years in business, FFWD will release its last issue on March 5th, 2015. It will remain to be seen how the loss of FFWD will impact the further development of the city's music industries, which finished second only to Winnipeg in our Music Industries Index (See Chapter 7.0).

10. Ottawa musicians believe the municipal government has a larger role to play.

When asked what would make the biggest difference to Ottawa-Gatineau's music industries, "More funding for music at the city level" ranked a strong second out of seven options, with full-time musicians selecting this option first by a fairly wide margin.

It is unclear to what extent musicians are aware of the funding already available via the Creation and Production Fund for Professional Artists, (although presumably full-time musicians would be most aware). However, our interviews confirmed that respondents felt the municipal government has a larger role to play in nurturing music by increasing funding for musicians, making funding available to a broader range of artists, and providing flexible access to free or affordable spaces for music.

We need to subsidize some things, but basically I think we need to open the space for creative people... in many cases, public space means the streets, parks. In some others, it could be city-owned empty or under-used space.

~TITO MEDINA, MUSICIAN/OWNER, CONSENSUS CROSS-CULTURAL COMMUNICATION & MULTIMEDIA ~

11. Ottawa musicians and music entrepreneurs are leading the way.

One of the reasons Ottawa musicians and music entrepreneurs said they were staying in Ottawa was because it offered them the opportunity to be creative on their own terms. Indeed, there is an independent spirit and creative resourcefulness to Ottawa's venues, festivals, studios, music stores, record labels, media, and musicians. This do-it-yourself spirit is the most important foundation for growth of local music industries and should be encouraged and supported at all levels. Creative and entrepreneurial spirit is at the core of all great scenes—it cannot be manufactured, but it can be nurtured.

I moved here 10 years ago and if I was going to leave, I probably would have left by now. I really like this place and this place has enabled me to do everything that I do.

~EMMANUEL SAYER, PROGRAM DIRECTOR, CHUO 89.1 FM/ORGANIZER, OTTAWA EXPLOSION/MUSICIAN, CRUSADES ~

STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS

Strengths

- Do-it-yourself, entrepreneurial attitude
- Supportive music community
- Presence of national-level music institutions/musicians
- Growing number of entrepreneur-driven music spaces
- Emerging music scenes generating buzz
- Several committed and long-term entrepreneurs, venues, and studios
- Well-established festival industry
- Emerging new music festivals
- Diversity of high-quality music education programs
- Strong campus/community and public broadcasting support
- Surrounding communities (e.g. Wakefield, Kemptville) with strong music venues
- Diversity of English and French music scenes and institutions
- Large college/university student population
- Affluent, educated, creative population
- Proximity to major Canadian and U.S. cities make accessing markets easy

Weaknesses

- Few established artist development businesses (e.g. managers, agents, publishers)
- Few mid-sized venues
- Few connections to national and international industries
- No coordinated local music strategy at the City level
- Weak representation of and advocacy for local industries
- Lack of widely-distributed, easy-to-access arts publication
- Lack of connection/collaboration among industry leaders
- Lack of connection between various music scenes
- Lack of overall music industry knowledge and services
- Separation of English and French ecosystems
- Expensive downtown housing/lack of low-rent artist spaces
- Spread out regional population
- Limited stock of dense, inexpensive, re-purposeable buildings
- Incomplete, infrequent late night transit service
- Proximity to major Canadian hubs makes it easy for musicians to relocate



Opportunities

- Bring people together to build awareness of local music resources across scenes, neighbourhoods
- Leverage industry knowledge of established local organizations and networks (e.g. Bluesfest, Ottawa Festivals, Spectrasonic, Kelp Music)
- Coordinate resources to better pursue available provincial funding for music
- City becomes advocate for investment by business/province in local music industries
- Explore opportunities for building connections to key centres of industry knowledge (e.g. Toronto, Montreal, New York, Los Angeles, Nashville)
- Study other mid-sized cities such as Winnipeg and Halifax to explore how they punch above their weight in music
- Explore opportunities for exporting Ottawa music
- Develop a vision for Ottawa music

Threats

- Key musicians leaving the city
- Key entrepreneurs leaving sector, in particular the small number of successful entrepreneurs in core music industry
- Key musicians and entrepreneurs not participating in discussion
- Discussion not crossing linguistic and ethnic divides
- Music not becoming a recognized part of Ottawa creative sector
- Loss of music spaces to gentrification and encroachment of new residential developments
- Continued lack of connection between music cluster and the larger business and government community
- Developing a city music vision before industry is on board
- Music businesses being constrained by licensing, noise regulations
- Ottawa falling behind other municipalities in accessing funding and developing industry cluster

4.0 WHY ARE CITIES INTERESTED IN MUSIC?

Culture, defined as both access to unique experiences and as quality of life, has come to be recognized as a key element of the competitive advantage of cities. . . . In the context of new economy dynamics, culture is understood as central to wealth creation.

~ TERRY FLEW, QUEENSLAND UNIVERSITY OF TECHNOLOGY ~

Music fosters economic growth by, among other things, promoting entrepreneurship and the formation of new businesses as well as attracting conventions and tourists to the Austin area. It promotes a superior quality of life for all Austin citizens by encouraging artistic and cultural development.

~ DAVID LORD, AUSTIN CHAMBER OF COMMERCE ~

By definition, successful artists are risk takers both by questioning social norms through artistic and cultural expression and also because of the often-precarious financial risk confronted by artists in doing this work. Artists typically have entrepreneurial careers and rather than playing to the stereotype of living in poverty, working menial jobs or waiting for the next grant or role, they actively seek diverse markets and venues for their work.

~ TARA VINODRAI AND MERIC GERTLER, UNIVERSITY OF TORONTO ~



Bonnie Doon at Pressed

Music is important to cities for a number of reasons, from the direct economic impact of music jobs to improving the quality of life for residents. Recently, music has come to the forefront as a key component of creative economies, creating opportunities for networking, inspiring entrepreneurship, and communicating the unique brand of a city beyond its borders.

The urban economist Richard Florida famously found that the most mobile, in-demand workers want to live in places with a vibrant culture where they're exposed to diverse people and ideas.²⁸ He points out the traits that musicians share with other creative problem-solvers like entrepreneurs, engineers, and researchers: they work in fields that are intensely competitive, they use their creativity and skills to turn their ideas into new products, and they constantly seek out markets for their work.

Music, and the compelling nightlife it generates, attracts young, skilled workers.^{29 30} But an active nightlife is important beyond simply drawing talent to the city.³¹ By nature, creative industries are inherently social, and music spaces (venues, clubs, festivals, etc.) serve as important settings for the creative economy. They are where new connections are made, trusted relationships are strengthened, and new work opportunities are floated. The social bonds created by nightlife are a key asset for today's cities.

There are quantifiable effects. Working with a massive Canada-wide dataset of business and census data, a recent study found a strong correlation between the presence of artist populations and rising local wages across *all* occupations.³² The relationship is particularly strong when artists are surrounded by a supportive scene, a phenomenon the researchers dub "scenius". This is the notion that a mix of talented artists, sophisticated audiences, and a culture of risk and experimentation boost the quality of output of all participants. A team crunching UK datasets found a similar relationship between creative clusters and wages elsewhere in the economy.³³ Their findings also support the notion that arts and cultural industries are attractive to highly skilled workers. Here in Canada, the Information and Communications Technology Council has detailed the many ways music supports and adds value to Canada's high-tech industries.³⁴

Music fans know how important music is to the cities in which they live, and so do economists. Music can serve as a competitive advantage. The next step is to look for ways to support the growth of music industries at the regional level.

WHAT ARE CITIES DOING ABOUT MUSIC?

Canada has a long history of government intervention in its music industries. From Canadian content regulations for radio in the 1970s, to support for sound recording projects in the 1980s, to today's Canada Music Fund for artists and entrepreneurs, these music policies have traditionally been made at the federal level.

Recently, however, music has also become an object of policy for Canadian municipalities. This shift to looking at music at the city level follows trends in the United Kingdom, Australia, and the United States, where local music policy is seen as a way of creating jobs and as part of urban revitalization strategies to better attract outside investment, talent, and tourism.³⁵ The following are examples of what has been done internationally, followed by recent municipal initiatives in Ontario.

Sheffield, UK

In the 1980s, as part of the city's attempt to re-invent itself following the decline of its local steel industry, Sheffield City Council attempted to build a local music industry from the ground up, including creating a rehearsal space, a recording studio, and a live venue in unused industrial buildings removed from the social centres of the city. This was part of a larger Cultural Industries Quarter that one influential study argues has been more successful for the film and television industries than for music:

"What the Sheffield example illustrates is, firstly, the need to look wider than the provision of facilities, the need, that is, to take account of the soft infrastructure, the people, the skills, the networking, the social context, of those involved in the music industry. Secondly, that any cultural quarter must be conceived as part of the wider socio-spatial fabric of the city."³⁶

What the authors found was that music infrastructure, more so than other creative industries, needs to be connected to the life of the city. The overlap of spaces for production and consumption creates important buzz and connections. They compared this approach to what had occurred in Manchester, where a music cluster had emerged in an economically-underdeveloped neighbourhood without the introduction of specific cultural policies. Access to "cheap rent, flexible letting, high vacancy and small properties" and a "laissez-faire" attitude were key to music development in Manchester. However, as the Manchester music cluster became successful, revitalizing the neighbourhood with it, the "lack of coordinated action" on the part of the city became an issue: property development began pushing music businesses out.

The authors' key finding is that *"while a local authority cannot conjure up an industry out of nothing, it can let it disappear through failing to support it."*³⁷

They suggest that municipal governments engage with music in a complex way: seeing it as part of the wider life of the city, exploring how it connects to other creative sub-sectors, and looking for ways to help connect local artists with the global centres of the industry.

Brisbane, Australia

As part of its Creative City policy strategy, Brisbane's Economic Development Division commissioned a report on Brisbane's local music industries in 2001. The research team found that Brisbane's music industries operated in a secondary role to Sydney and Melbourne and, like other "second-tier" cities, Brisbane was missing "mid-level activities in the music industry value chain" (e.g. promoters, record companies, artist services, etc.).³⁸

But Brisbane's music industries had also been evolving since the 1990s thanks to several factors: the success of local festivals, the decision of established artists to stay in the city, and the presence of a national youth-oriented radio station that allowed local musicians to reach a national audience. The researchers also found that the sustainability of Brisbane's music industries was being threatened by factors like gentrification (and accompanying noise complaints), and a lack of industry representation in the municipal government.³⁹

By 2005, Brisbane City Council had enacted a number of the report's recommendations: representatives of the music industries (and other entertainment and tourism sectors) were now involved in the development of zoning, liquor licensing, and noise regulations; sections of the city had been designated "special entertainment areas" with special noise regulations; and City Council was working with other levels of government to enhance music business advisory services.^{40 41}

Ontario Cities

The Province of Ontario has recently made music an important priority for economic development, creating a \$45 million Ontario Music Fund. Many of its cities have been following its lead.

Hamilton, Ontario

As part of its 2010-2015 Economic Development Strategy, Hamilton identified the city's creative industries—including music—as a top priority for development. In 2013, a motion was passed to establish a music working group that would develop a Hamilton Music Strategy and examine the need for a city music office. In 2014, Council approved a Hamilton Music Strategy with four goals: "1. Strengthen the local music industry; 2. Grow audiences and appreciation of music; 3. Increase access to music experiences; and, 4. Cultivate music creation and talent." Also approved was a one-time budget of \$50,000 to establish a Music and Film Office under its Tourism department. The Music and Film Office is now located in Hamilton's downtown Visitor Information Centre and provides resources and information to those in the city's film and music industries.⁴²

London, Ontario

Under recommendation of the city's Investment and Economic Prosperity Committee, London established a Music Industry Development Task Force made up of 22 local music industry stakeholders in early 2014. The goal of the Task Force "was to guide initiatives by supporting the economic and cultural development of London's music industry; to exchange ideas; to discuss opportunities and challenges; to provide input and advice; and to collectively take advantage of the current Ontario Music Fund, in order to support growth and innovation in London's Music Industry." In August of 2014, it was recommended that \$300,000 be drawn from the city's Economic Development Reserve Fund to be used for the two-year pilot of a London Music Office.⁴³



Toronto, Ontario

Following a major report from Music Canada on how Toronto could accelerate the growth of its music industries following best practices from Austin, Texas, Toronto City Council approved the formation of a Toronto Music Industry Advisory Council in 2013 with 34 members of the local music industries. The advisory council includes representatives from local festivals, associations, businesses, as well as local musicians⁴⁴ and is tasked with “developing a strategic action plan that maximizes the impact of City support for the Toronto Music Industry.” Other initiatives taken by Toronto include an alliance with the city of Austin and, most recently, the appointment of the city’s first Music Sector Development Officer.⁴⁵

Kitchener and Peterborough are other cities in Ontario that have taken steps to support and benefit from their local music industries.

CASE STUDY: AUSTIN, TEXAS

Austin, Texas stands out as an example of how music can play a catalyzing role in the growth of a thriving creative sector, and the role city government can play in creating the conditions for music success. Building on the vibrant history of its country, punk, and alternative music scenes, Austin successfully branded itself as “The Live Music Capital of the World” and supported that vision with a range of initiatives: building connections inside and outside the city as well as supporting music businesses, music tourism, and convention activity.

The most visible international example of Austin’s music industries is its South by Southwest music festival, which runs for two weeks every year and in 2014 had an economic impact of \$315 million.⁴⁶ By comparison, a recent University of Ottawa report found that the Ottawa Senators has an annual economic impact of \$204 million.⁴⁷


Toronto has recently sought to learn from the experiences of Austin’s music industries, conducting a study to leverage best practices from the city. However, Ottawa may be in a better position to benefit from such lessons. Austin, like Ottawa, is a mid-sized city, on the periphery of global music industries. Like Ottawa, it’s a centre of government with a highly educated population, a strong high-tech industry, and a large university and college student population. While Toronto’s cluster will continue to be the headquarters of Canada’s music industries for the foreseeable future, Ottawa has the potential, like Austin, to develop into an important regional hub with its own unique musical identity and industry strengths. Part of the reason for Austin’s success is that it never tried to become New York or Los Angeles.

Austin Demographics	Ottawa Demographics
<ul style="list-style-type: none">1.5 million residents in the Greater Austin Area60,000 graduate and undergraduate students at four universities.45,000 students at city’s community college⁴⁸65,000 high tech sector employees⁴⁹	<ul style="list-style-type: none">1.282 million residents in Ottawa-Gatineau⁵⁰Approximately 60,000 university students at three universities⁵¹More than 50,000 full and part-time students at two colleges76,000 high tech sector employees⁵²

Austin Music Numbers

In 2010, Austin’s music industries produced:

- \$856 million in economic output
- \$478 million in value-added impact
- \$230 million in tax revenues
- 7,957 jobs



Music tourism added another \$806 million in economic output and over 10,000 jobs, for a total economic output of \$1.6 billion⁵³ from music related activity.

Music is the largest part of Austin's thriving \$4.35 billion creative sector:⁵⁴

- Gaming was the next largest contributor at \$990 million.
- Film contributed \$295 million in output.
- The creative sector in Austin grew by 25% between 2005 and 2010.

The business directory for the Texas Music Office,⁵⁵ a "state-funded business promotion office and information clearinghouse", lists 2057 organizations in the City of Austin. The directory includes dozens of categories of businesses, including attorneys and insurance companies with music divisions and more:

- 26 Music Instrument Manufacturers
- 39 Concert Promoters
- 85 Booking Agents
- 92 Artist Managers
- 122 Record Labels
- 179 Recording Studios

Lessons from Austin

It is tempting to look at Austin today and conclude the best strategy for building a strong music centre is to replicate its success as a music tourism and convention destination. That strategy would be misguided: Austin arose from a unique set of circumstances that cannot be duplicated. Instead, the most important lesson from Austin is not any one initiative, but in *how* it created the conditions for growth.

How did Austin come to embrace its musical identity as a key asset to local economic development, one that worked hand-in-hand with the city's goal of attracting high-tech and creative businesses?

According to a detailed history of Austin music, its evolution from a place with vibrant but disparate music scenes into a place where music permeated the city was the outcome of a *series of connections*: initiated first by music entrepreneurs, then supported by the city and the local business community. (The following information and quotations are taken from *Dissonant Identities: The Rock 'n' Roll Scene in Austin, Texas* by Barry Shank.)


Three of the most important developments were:

- **Long-time music entrepreneurs in the city began to organize.** In 1982, several key figures in Austin's music industries created an Austin chapter of the Texas Music Association (TMA). The TMA "strove to avoid the risk of aligning with passing trends, choosing instead to concentrate on attracting national and international entertainment capital to Texas and on developing methods to promote commercial ventures that could profit from all trends." The local TMA also positioned music as key feature of creative cities: "Live music improves the quality of life in Austin."

- **The Austin Chamber of Commerce (ACC) became a champion of music.** The TMA reached out to the local Chamber of Commerce to help stimulate investment in music. A key member of the ACC saw the value of music both for tourism and broader economic development: “Music as a business fits in with several goals of the Chamber [of Commerce]. It fosters economic growth by, among other things, promoting entrepreneurship and the formation of new businesses as well as attracting conventions and tourists to the Austin area. It promotes a superior quality of life for all Austin citizens by encouraging artistic and cultural development.” In fact, “*seen as an industry, the music business is just about perfect.*”
- **Alternative and public media connected the music of Austin inside and outside of the city.** From Austin’s entrepreneurial punk scene came the alternative weekly the Austin Chronicle, which helped create the sense of an inclusive, united cultural community (“Keep Austin Weird”) and cultivate a broader taste for music in the city, while providing a platform for local advertisers to reach that culturally-aware audience.” *The Austin Chronicle is dedicated to bringing all of Austin closer together. We are convinced that this is a service the city needs and that the Austin Chronicle will make Austin a better place to live.*” Also important was Austin City Limits, a public television program hosted on the University of Texas campus that broadcast the live music of Austin across the country. Over time, City Limits grew organically into a much larger movement that now includes a live album series, a downtown theatre development, and an annual music festival.

The three-part foundation led to further developments:

- The TMA and ACC created a “framework for the alliance of business and music.” Music was seen as part of the “opportunity economy.”
- An Austin Music Advisory Council was formed and the Chamber of Commerce funded a series of local music studies.
- The Austin Music Advisory Council recommended the Chamber “create a full-time music entertainment development office; sponsor an Austin display at major music industry conventions; help develop music trade conventions in Austin, and encourage the development of an annual nationally-recognized Austin music exposition.”
- The City of Austin appointed a liaison for the music industries and sponsored trade missions to help export local music.
- The Chronicle sponsored an annual music award ceremony, building awareness of the local music scene across the city.



Summary

In the 1980s, Austin experienced the boom and bust of several music scenes and related businesses. The city had similar weaknesses to those of Ottawa today, including a lack of connecting businesses such as managers, bookers, and publishers. As a journalist from the Chronicle wrote in 1980s: “The same problems that contributed to the demise of the progressive country scene a few years back are still around: no competent management firms with national connections, no decent studios, and an insidious chauvinism which declares that having aspirations above the Austin bar circuit means selling out.”

But Austin music and business communities learned from their failures and persisted, seeing opportunities for mutual benefit. Thanks to the initiative of a few long-time entrepreneurs, the creative energy coming out of the local punk scene, and the receptiveness of the municipal government and business community, Austin was able to build a framework for music development that transcended the rise and fall of any particular scene.

Arguably, Ottawa is at a similar point in its story (with better studios). There are long-term entrepreneurs. There is DIY spirit. There is an awareness of the role of music in city economies. The question now is how those pieces will come together.

Louis Meyers, a member of the Austin Music Advisory Council and one of the founders of SXSW, said that city government is most effective when it views its role as “bringing people together, giving them the ability to know each other and to build together.” (Personal interview)


5.0 DEFINING THE MUSIC INDUSTRIES AT THE CITY LEVEL

The music industry is a core component of the creative sector, perhaps more interrelated with other sectors than any other creative industry vertical. Music is a product unto itself, of course, but it is also an integral element of films and TV programming. Moreover, it is increasingly seen as an active component of new media (e.g. in electronic games) and as part of the growing use of video on the Internet. ~ A STRATEGIC STUDY FOR THE MUSIC INDUSTRY IN ONTARIO, NORDICITY ~

I see the recording industries and the music industries as two different things. The music industry is bigger than it's ever been. More access to technology, more access to self-distribution and marketing for artists that want on the Internet, and live music is thriving. It is the recorded industries, in the sale and marketing of recorded music, that has strongly declined. ~ COLIN MILLS, MUSIC INDUSTRY ARTS, ALGONQUIN COLLEGE ~

There are three things. There is music, there is the business of music, which covers record companies, agents and managers and all that, and then there is the music business, which includes everything from SOCAN to festivals. Can you say that now the Heart and Crown is not in the music business? No you can't, because even though it's cover bands, they're keeping musicians working and some of those musicians do original work and the Heart and Crown is paying SOCAN.

~ EUGENE HASLAM, OTTAWA VENUE OWNER ~



Defining the music industries today is challenging for a number of reasons. As the passage from the Nordicity report above notes, music is both an industry unto itself and a component of many other industries, from film to video games to restaurants to sporting events. The use of the term “music industries” rather than a singular “music industry” is one way of pointing to the wide range of activities that now make up the broad music business.

Music also happens at a wide range of scales, from the Arcade Fire concert at the Canadian Tire Centre in 2014 to the Arcade Fire concert at the Black Sheep Inn in 2004 to the times when members of Arcade Fire played small punk shows around Ottawa in the 1990s as part of other bands.

Terry Flew, a researcher on music and cities, notes that the part-time nature of much musical work, and the lack of documentation of the smaller-scale elements of the music industries, presents a challenge when making local music industries an object of government policy. It is easier to focus on what is easily measured, such as the mega-show at the Canadian Tire Centre, than a local punk rock show.⁵⁶ But it is the smaller, underground music events that are often the catalysts for city-transforming scenes.

Looking at the music industries at the level of the city allows us to see how the eventual commercial success of a group like Arcade Fire is connected to the earlier participation of its members in their local scenes. The opportunities provided by small venues, studios, labels, and promoters, not to mention school music programs, are part of the story of so many famous musicians. It is just difficult to predict at the small-scale, local level, who is going to break out. Economists call this the *nobody knows* principle of creative industries: the proven inability of even the most experienced and skilled producers to predict, at an early stage, the commercial success of a new project.^{57 58 59}

Which is why a city the size of Ottawa is an exciting place for looking at the music industries. Ottawa is connected to the large-scale globalized music industries through institutions like RBC Bluesfest, the Canadian Tire Centre, commercial radio, and via professional musicians who live in Ottawa but tour internationally. But Ottawa is also small enough that small-scale, part-time activity can have a big impact; where one music venue, festival, or monthly dance party can actually change the city.

This range of scales influences how we define the local music industries. Unlike the national or global level—a scale that necessarily focuses on large aggregate statistics—at the local level, the full range of commercial music activity is visible. At the local scale we see not only the stadium and concert hall performances, but also the open mic nights, the buskers, the rehearsal spaces, the instrument retailers where musicians work, the local record stores that promote music from the city, and so on.

At the city level, the music industries are represented not just by the traditional “music business,” which tends to focus on the recording industries (e.g. labels, producers, publishers, studios, and distributors), but as an ecosystem in which many different types of musicians, businesses, and organizations connect to support music-making at a range of professional and semi-professional scales.

The quote from Eugene Haslam at the beginning of this section points to the importance of these types of interconnections.

Taking these types of interconnections into account, we see Ottawa's local music industries as an ecosystem made up of the following sub-sectors:

- Songwriters, composers, musicians
- Music companies (labels, publishers, promoters etc.)
- Recording studios
- Rehearsal spaces
- Music venues
- Music festivals
- Music retailers
- Music organizations (SOCAN, APCM, etc.)
- Music education
- Music instrument retail and rental
- Music instrument design and manufacturing
- Live music support (sound, lighting, security etc.)
- Media

This broad look at the music industries is in line with other recent research and policymaking,^{60 61} and we will use these categories to profile the local music industries.



LOCAL MUSIC INDUSTRIES AND MUSICIAN CAREER STAGES

The following table outlines the career stages of musicians as they move from amateur or part-time musicians to professional full-time musicians, and the different components of the music industries that play a role in education and professional development.

	Beginning (Local)	Apprenticing (Local-Regional)	Emerging (Local-Regional-National)	Export Ready (Regional-National)	Professional (National-International)
Education	- School music programs - Music lessons - Music camps and other programs	- Post-secondary music programs - Industry events	- Industry events	- Industry events	
Spaces	- Record stores - Instrument stores	- Record stores - Instrument stores - Rehearsal spaces - Recording studios	- Record stores - Instrument stores - Rehearsal spaces - Recording studios	- Record stores - Instrument stores - Rehearsal spaces - Recording studios	- Record stores - Instrument stores - Rehearsal spaces - Recording studios
Venues	- All-ages venues	- All-ages venues - Small venues	- All-ages venues - Small venues - Medium venues - Festivals	- Small venues - Medium venues - Large venues - Festivals	- Medium venues - Large venues - Festivals
Businesses		- Manufacturing (e.g. vinyl) - Online distribution (e.g. Bandcamp)	- Manufacturing (e.g. vinyl) - Online distribution (e.g. Bandcamp) - Local record labels/promoters + - Bookers - Managers	- National labels - Bookers - Managers - Publishers	- National/Int'l labels - Bookers - Managers - Publishers
Organizations	- APCM	- APCM	- SOCAN - Re:Sound - CFM - APCM	- SOCAN - Re:Sound - CFM - APCM	- SOCAN - Re:Sound - CFM - APCM
Funders			- City - FACTOR	- City - FACTOR - OMF - Starmaker	- City - FACTOR - OMF - Starmaker
Media		- Blogs - Campus Radio	- Blogs - Campus Radio - CBC	- Blogs - Campus Radio - CBC - Commercial Radio	- Blogs - Campus Radio - CBC - Commercial Radio



RBC Bluesfest (Photo: Steve Gerecke)

CANADA'S MUSIC INDUSTRIES BY THE NUMBERS

According to Canadian Heritage's 2014 Review of the Canadian Music Industry,⁶² Canada's music industries contribute nearly \$3 billion to the economy annually. There are currently 10,000 Canadians employed in the sound recording and live music sectors, and the country is home to 30,000 professional songwriters.

The review suggests that Canada's industries are performing well against their international peers. Between 2001 and 2012, Canadian artists' share of domestic album sales increased from 16% to 25%, while royalties paid by SOCAN for the use of Canadian music internationally increased by 43% over the same period.⁶³

However, there are also less positive numbers. Music Canada, the organization that represents the major labels in Canada, reported that overall sales of recordings declined by 28.5% between 2007 and 2011,⁶⁴ and physical sales of recorded music declined from \$765 million in 2001 to \$217 million in 2012, a drop of 72% over ten years.

Canadian musicians also continue to struggle to make a living from music. A 2012 Nordicity report for the Canadian Independent Music Association found that independent musicians made an average of \$7,228 per year, and spent an average of 29 hours of week on their music, working out to a little less than \$5/hour. A recent Hill Strategies report⁶⁵ gave the average income for a Canadian musician at \$22,800, a number more in line with what we found in our survey, but still less than half of Ontario's average income of approximately \$48,000.⁶⁶

6.0 A PROFILE OF OTTAWA'S MUSIC INDUSTRIES

What do Ottawa's music industries look like? Using the broad definition of the music industries outlined in the previous section, this part of the report will provide a description of the different sub-sectors of the industries and how they connect to form a local ecosystem. These sub-sectors are:

- Songwriters, composers, musicians
- Music companies
- Recording studios
- Rehearsal spaces
- Music venues
- Music festivals
- Music retailers
- Music organizations
- Music education
- Music instrument retail and rental
- Music instrument design and manufacturing
- Live music services
- Media

See Appendix D for listings of local businesses organized by sub-sector.



Amanda Rheume (Photo: Jamie Kronick)

SONGWRITERS, COMPOSERS, MUSICIANS

Ottawa's core music industry of musicians and songwriters is characterized by the small number of musicians who make their living entirely from music, relative to the larger number of participants who support their music with other work. This is typical of the music industries in general.⁶⁷ Ottawa-area musicians range from full-time members of the National Arts Centre Orchestra and international touring artists to aspiring part-time musicians performing in a wide range of genres, from rock to folk to hip-hop.

Calculating the number of active musicians in a city is difficult. Many professional musicians are not salaried employees, and many semi-professional musicians consider their occupation to be musician. The 2006 long-form census tells us that 1395 people in the Ottawa-Gatineau region reported their occupation as "musician". With over 800 musicians responding to the online survey, we know that the Census number is not capturing everyone.

Thanks to Canada's central publishing rights collection organization, SOCAN, we know there are 2503 SOCAN members registered to collect royalties in the National Capital Region.⁶⁸ Of the 800 musicians who responded to our online survey over a two-week period, 262 were members of SOCAN. We found a similar ratio in the response rate of members of the Musicians' Association of Ottawa-Gatineau, Local 180. Approximately 70 survey respondents were members of Local 180, while that organization has between 750-850 members. These numbers suggest that the number of professional and semi-professional musicians in the region is in the thousands, and likely several times greater than what is captured in the Census data.

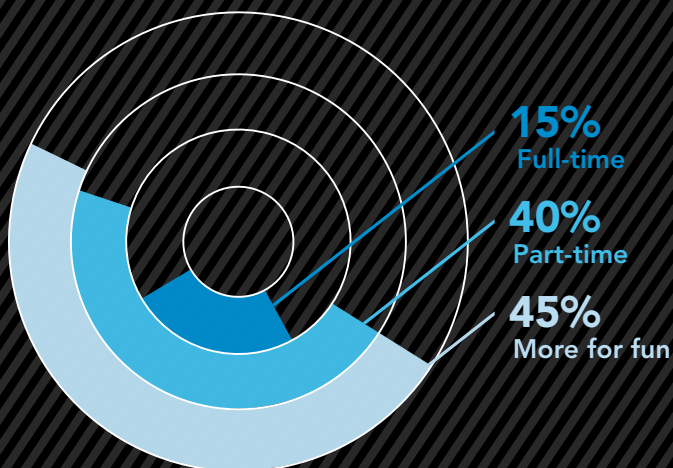
It is clear that there is no one way to make a living as a musician other than to be flexible, creative, and to work hard. Many full-time musicians combine a variety of types of work including music teaching, producing or recording other musician's records, working as session players, producing music videos, composing music for animation programming or film, and operating record labels. Some musicians have local weekly gigs, host open mic nights around the city, or play in cover bands, while others are focused almost exclusively on developing international markets for their work. Our findings concurred with other recent studies that two common aspects of being a professional musician are: welcoming a diversity of work and networking to find that work.⁶⁹ Diversity of work should be seen as one of the productive elements of the music ecosystem, encouraging networks within and beyond the music sector.

Ottawa has large numbers of part-time musicians who are pursuing music as a career, as well as many serious musicians who have careers in other fields. It is notable that musicians who defined themselves as "amateur or semi-professional" were more likely to work in highly paid fields such as high-tech or the public sector, while those who defined themselves as "part-time professionals" were more likely to work in jobs with flexible hours such as the food and hospitality industries, allowing for extended periods of touring.

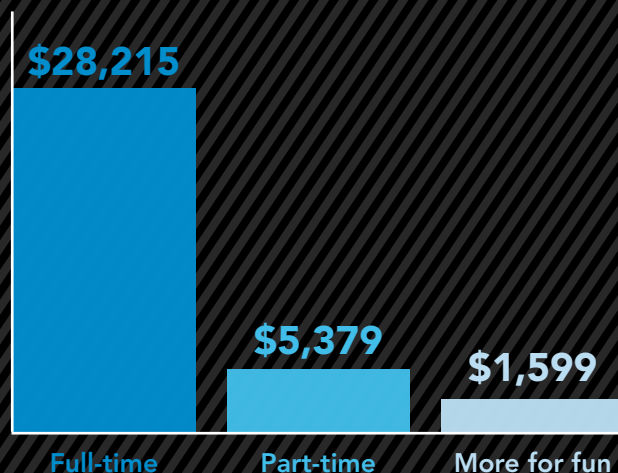
While the most popular neighbourhoods for musicians tend to be in the downtown areas, particularly Centretown, West Centretown and Lowertown, full-time musicians appear more likely than other types of musicians to live outside the downtown core, particularly in rural areas or on the Québec side of the Ottawa river. This suggests that once established, it is no longer as necessary for full-time musicians to be located at the centre of local music scenes. It may also be related to the availability of affordable housing. Indeed, our survey found that a substantial number of Ottawa musicians and music entrepreneurs have recently chosen to live in Hull for its affordable housing and accessible music spaces. The "Ottawa" music ecosystem therefore clearly extends into Québec and local music policies should take into this into account.

OTTAWA MUSICIAN SURVEY RESULTS

Musicians answering the survey:



Average annual music income:



What would most help you achieve your music goals?

Top 3 responses from a list of 8 options.

Full-time



Part-time



Mostly for fun



More access to artist services (e.g. booker, publicist)



More access to funding for recording, marketing, touring

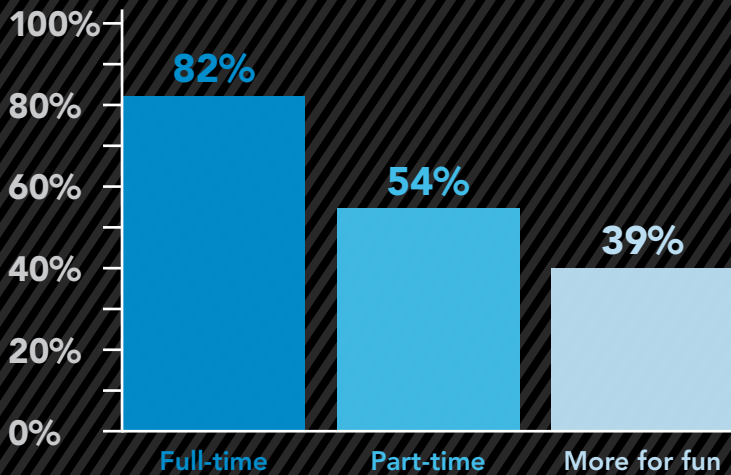


Opportunities to play bigger local shows (e.g. festivals, showcases)

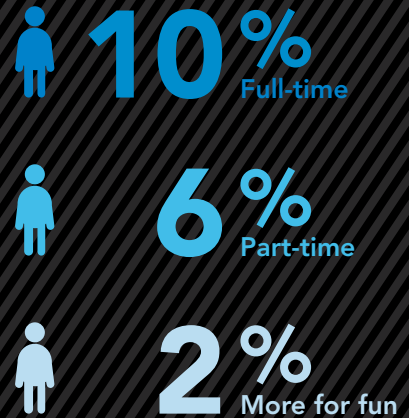


Mentorship opportunities with established artists

Have post-secondary music education?



Have a booking agent?



What would make the biggest difference to Ottawa music?

Top 3 responses from a list of 7 options.

Full-time

- 1
- 2
- 3

Part-time

- 1
- 2
- 3

Mostly for fun

- 1
- 2
- 3



More music businesses
(e.g. labels, publicists)



More municipal
funding for music



More media coverage
of local music (e.g. arts weekly)



More mid to
large-sized venues


MUSIC COMPANIES

The term “Music Company” refers to any company engaged in artist development activity, including record labels, concert promotion, management, publishing, publicity, and booking. Ottawa’s music industries are home to a small number of these types of music companies relative to other types of music activity. Furthermore, it appears the companies that do exist are mostly small in size with few strong connections to Canada’s larger music companies. This lack of connection to the larger industries is one obstacle to exporting local music and growing the industries.

There are, however, signs that this is starting to change. Concert promoter Spectrasonic and artist management/services company Kelp Music have both evolved from small companies focused on alternative genres into companies working in all genres and with all levels of artists. Spectrasonic is responsible for bringing hundreds of national- and international-calibre artists to Ottawa every year, and local artists are often given the opportunity to open its shows. Kelp Music has grown to represent national-level artists like opera superstar Measha Brueggergosman. These companies are, therefore, beginning to connect the Ottawa area to larger networks of music production and consumption, a phenomenon that should create long-term benefits for local artists. The appearance of newer companies offering services like grant-writing, booking, and publicity, such as Partick Artists and You Rock Red, further suggests there is a growing market for artist services in the region.

At the same time, a number of smaller “indie labels,” including E-Tron Records (based in Hull) and Bruised Tongue, have been making important contributions to Ottawa’s underground music scenes. These labels can be seen as part of a larger tradition of North American do-it-yourself indies operating outside of the mainstream industry. While less visible to mass audiences, this type of activity connects to similar scenes around the world, creating alternative networks for the circulation of cultural products. It is from within these scenes that new sounds, practices, and musical identities often emerge, playing an important role in making cities well-known for particular types of music. As they are not focused on a mass audience and are supported by community-oriented institutions such as campus radio, it is particularly important for musicians from these types of scenes to be able to connect with similar alternative networks around the world. On that note, one local musician/music entrepreneur remarked that perhaps the best thing Canadian governments can do for musicians is help make it easier for them to tour in the U.S.⁷⁰

Separate in a different way from Canada’s mainstream industries (including the Francophone industries based in Montreal) are Franco-Ontarian music businesses, such as Orleans-based Le Fab. Owned by one of the most successful Franco-Ontarian artists, Michel Bénac of Swing, Le Fab is committed first to developing emerging Franco-Ontarian musicians, with a long-term view towards signing musician from other French-Canadian communities. Unlike the English industries, businesses like Le Fab have access to organizations such as APCM and Réseau Ontario, institutions that have created distribution and live performance networks across Ontario and Canada for musicians working in French.



Ten music companies responded to the online survey. These were small mostly owner-operated businesses with an average of 1.5 additional part-time employees. The average length of time in business was four years, indicating that this is a young sub-sector compared with other local music industries sub-sectors. The companies who responded to the survey noted that their biggest challenge was money: attracting investment and becoming profitable. Other challenges included the lack of an arts and culture weekly, lack of industry knowledge, and music scenes not collaborating.

RECORDING STUDIOS AND AUDIO POST SERVICES

One of the strengths of Ottawa's music industries is the region's stable of high-quality yet accessible recording studios. Ottawa is home to a small number of larger studios such as Raven Street Studios, which has been home to projects from major label artists, as well as many smaller professional studios that attract independent recording artists from as far away as Australia. The city is also home to mobile recording studios, studios that specialize in mastering, as well as several audio post facilities that provide audio services for film and television industries.

The importance of local recording studios cannot be overemphasized. Beyond their core function as a space for the production of recorded music, studios play a role in the professional development of local musicians, connecting them with producers and session musicians, and otherwise helping them develop knowledge and skills as recording artists. Studios are also training grounds for local recording engineers, providing opportunities for skills development and collaboration. Studios act as spaces that bring together songwriters, musicians, and producers from different locations and scenes in and beyond the city. Studios also connect different industries, providing services for television, film, and digital gaming. And the recorded music they produce travels, taking the city's name and sounds with it.

Thirteen studios responded to the online survey, with 62% in business for longer than 11 years and 31% in operation longer than 20 years. These are small businesses, mostly owner-operated with an average of one additional part-time or contract employee.

The recording studios responding to the online survey identified their biggest challenge as competition from DIY home studios and low-priced start-ups. Other challenges include local artists not having the funds to record professionally, or those with funds travelling to other cities. Another obstacle mentioned frequently was the fragmented nature of local music scenes.

REHEARSAL SPACES

Rehearsal spaces offer bands facilities for writing and practicing material at performance-level volume. These spaces are made up of a number of soundproofed rooms equipped with drums, microphones, and other gear. They are typically located in industrial areas where noise can be made without disturbing residential neighbours.

Rehearsal spaces act both as places for music-making and as social spaces for exchanging knowledge and building professional connections. Some rehearsal spaces offer musicians the option of renting rooms on a monthly basis, which are shared among bands, strengthening relationships between musicians. Some rehearsal spaces also do double duty as recording studios, and occasionally as live venues.

While Ottawa does not have many rehearsal spaces, the opening of Capital Rehearsal Studios in 2007 is arguably one of the most significant recent developments in Ottawa's music ecosystem. The facility expanded in 2012, when it moved to the City Centre Building off Scott Street, an area that's fast emerging as a cultural hub for the city. Run by Luke Martin, a musician who has been in several influential local bands including The White Wires, Capital Rehearsal Studios offers 15 rehearsal rooms used by over 100 local bands every month. The facility is also home to a live venue called Gabba Hey that hosts two or three live events a month, and a vinyl-heavy record store that sells the releases of many local artists.

No rehearsal studios responded to the online survey.

LIVE MUSIC VENUES

Music takes place in a wide range of venues across the city. Pollstar, the national database of live music venues, lists over 200 places where music has been performed in the Ottawa area. The Canadian Independent Recording Artists Association lists over 70 live music venues in the city, a number that reflects the most active music establishments in the city.

Ottawa is home to several large-scale institutions such as the Canadian Tire Centre, the National Arts Centre, and the city-owned Shenkman Centre and CentrepoinTE Theatre. Either government-funded or attached to other large-scale organizations, these venues have the infrastructure and budget to attract larger artists, which can make them inaccessible to many local performers. Local artists occasionally use the NAC's Fourth Stage for important performances such as album releases, but the NAC is generally perceived as too expensive for local emerging artists booking their own shows. When asked why the NAC Presents series does not feature more artists from the area, one local industry professional remarked: "The NAC deals with bookers. Ottawa bands don't have bookers."

Indeed, most connected to the city's emerging music scenes are the many small venues with capacities ranging from below 50 to 250. These include a range of newer venues such as Raw Sugar, House of TARG, Pressed, Gabba Hey, Mugshots, and the Daily Grind, as well as long-running establishments such as the Black Sheep Inn, Zaphod's, Babylon, and Mavericks. These types of spaces are critical for providing opportunities for local artists to perform, build audiences, and connect with touring artists, and they are crucial to the development of local music scenes.



First Base at House of TARG
(Photo: Ming Wu)

One of the interesting trends in the area's live music landscape has been the use of non-traditional spaces such as bookstores, bakeries, and living rooms for live music performances. This may be satisfying a desire among some audiences for more listening-centred rooms, something a space like the Neat Café in Burnstown has successfully created in recent years. Indeed, the arrival of venues such as the Neat Café and The Branch in Kemptville, have, along with the Black Sheep Inn made Ottawa's surrounding rural communities a destination for musicians and music fans. It is interesting, for example, that Bluesfest has noticed an increase in the number of applications from musicians from the Ottawa Valley in recent years.⁷¹

As described earlier in the report, one of the main weaknesses of the Ottawa music ecosystem is the lack of venues with a capacity between 300 and 600. Barrymore's, which for years was a central hub of Ottawa's live music scene, has stopped hosting live music on a regular basis. Larger venue options include the 700-person capacity Algonquin Commons Theatre and the Bronson Centre with a capacity of over 800. While these venues have become important in hosting larger acts from outside the city, they are generally seen as too large to act as a next step for local performers after playing the city's smaller venues. Ottawa's festivals currently offer local musicians the best option for playing in front of bigger audiences.

Of the 23 live venues that responded to the survey, approximately 25% were dedicated music venues and 25% were non-traditional spaces (e.g. churches, music stores, rec centre). The other 50% were made up of equally bars and pubs, restaurants and theatres/concert halls.

A little over 50% of the responding venues had a capacity between 100-300, while 32% had less than a 100-person capacity. The other four venues included two theatres with a 300-600 capacity, 1 venue with a 600-900 capacity and 1 venue greater than 1000.

Almost 50% of venues presented fewer than 5 shows a month while 40% presented more than 15 shows per month. The average ticket price across all venues was a little over \$10.

Most venues had been in operation longer than 10 years and employed an average of 5-6 full time employees and 7-8 part-time employees. 76% of respondents were open to booking musicians directly, 35% worked with an outside promoter while 35% had a presenter in-house.

Over 90% of venues noted that they provide their own PA. Over 80% provide a sound person, while another 70% provide a door person. Security personnel were provided at 44% of venues while another 20% said they offered additional support such as ticketing and marketing.

Respondents suggested that spring and fall were the best seasons for attendance while summer was the worst.

43% of venues think the city is getting better for music versus 31% who think it is getting worse.

A wide range of challenges were identified by respondents, from noise complaints to being too small to attract bigger artists. However the most common challenge was in attracting audiences: communications, promotion, getting artists to promote their shows, being busy every night of the week.

Respondents suggested that ways to make the local scene better would include easy transportation to events, more funding for non-national institutions, audiences going to smaller clubs and not just festivals, more music programming in schools, more collaboration between venues and the process and more encouragement for the public to be involved in arts and culture.



Alternative venue



Canadian Tire Centre



MUSIC FESTIVALS

Music festivals have been one of the brightest lights during a difficult period for the global music industries over the past decade.⁷² They are also Ottawa's most established, visible, and organized music industry sub-sector. Many of Ottawa's music festivals are members of the non-profit organization Ottawa Festivals, which was founded in 1996 to strengthen the local festival industry and advocate for common interests. It's an effort that appears to have been successful: the organization has grown to over 90 member events, and in 2014, Ottawa was recognized as the best festival city in Ontario.⁷³

Music festivals create new spaces for music, transforming fields into outdoor concert halls and parking lots into nightclubs (as well as repurposing existing spaces like churches and record stores). The transformation of outdoor spaces into music venues creates significant economic spillover effects, as festivals lead to opportunities for food vendors, sound and event rental companies, security personnel, and many other services. Toersa, for example, a successful local security company, grew out of RBC Bluesfest's need for additional security to expand its liquor license.⁷⁴

Music festivals also create professional development opportunities for local artists, something that is particularly important given the lack of mid-sized venues in the city. Kellylee Evans, an internationally-renowned jazz singer from Ottawa, played her first festival gig at Westfest before leading to a breakthrough performance at the Ottawa Jazz Festival, an experience that then helped her land a gig at the world-famous Montreal Jazz Festival. Asked how festivals can help local artists, Evans is clear: "More opening act options. There are so many people that go to see these big artists. The best thing for a local artist [is] to be able to open for them."⁷⁵

Festivals like RBC Bluesfest have also taken artist development outside of the realm of the festival stage, helping local blues artists such as MonkeyJunk showcase in the U.S., creating education and youth programs such as Be In The Band and, most recently, hosting industry information sessions for local musicians.

From RBC Bluesfest, with an annual budget of \$15 million and 15 full-time employees, to Arboretum Music Festival, which mounted a week-long event in 2014 with an all-volunteer staff, Ottawa's festivals provide unique opportunities for local artists to play for large audiences and network with more established artists from within and beyond the city. And while the largest festivals have the greatest direct economic impact, cultivating an environment that encourages smaller DIY festivals like Ottawa Explosion, House of PainT, Arboretum Music Festival, and Westfest can have an out-sized impact at building Ottawa's international reputation as a music city.

MUSIC ORGANIZATIONS

Local music organizations, associations, and unions play important roles in representing and advocating the collective interests of musicians, providing resources for professional and business development, funding local music, and bringing music people together.

While not located in Ottawa, the organization with the largest membership among local musicians is SOCAN, the Society of Composers, Authors and Music Publishers of Canada. There are 2503 SOCAN members in the National Capital Region.⁷⁶ Of the musicians who responded to the online survey, 262 were members of SOCAN.

The organization with the next largest membership after SOCAN is the Musicians' Association of Ottawa-Gatineau, Local 180, a member of the Canadian Federation of Musicians (formerly the American Federation of Musicians). Approximately 70 members of CFM responded to the online survey. According to Local 180, the organization has between 750 and 850 dues-paying members in the area, with approximately 250 being members of local orchestras (National Arts Centre Orchestra, Ottawa Symphony Orchestra, the Orchestre Symphonie de Gatineau and the Sudbury Symphony Orchestra). Representatives of the union note that membership is down by 50% compared to 30 years ago when the law changed to make it possible for bars and hotels to hire non-union members. In the absence of required contracts, one of the main reasons that popular musicians join the union today is to obtain a P2 Visa, which is necessary to perform in the United States. According to representatives of the union, about 20% of Local 180's membership currently have P2 Visas. Representatives also noted that one of the union's most important services, and one of which many musicians working in rock and pop genres are unaware, is the musicians' pension fund. The pension plan is symbolic of the union's long-term approach to building careers in music, and one that appears foreign to many emerging musicians today, particularly those working in popular music genres. The union is also a resource for learning about rights and contracts. They note that one of the most important skills for musicians to learn is to "do all the paperwork."⁷⁷

Another important local organization is the Association des Professionnels de la Chanson et de la Musique (APCM). 53% of respondents to the French online survey were members of APCM. APCM, which is headquartered in Ottawa and has four full-time employees, offers Francophone musicians in Ontario and Western Canada opportunities for professionalization, including music coaching, distribution of recordings (often required in order for musicians to apply for funding from other bodies), publicity, and connections to presenters across the country. The organization is particularly active within local Francophone public schools, running programs to introduce promising musicians to the business of music, and making connections between students and practicing professionals. There is no comparable organization in the English music industries.

There is also no locally-based organization to represent the region's music industries as a whole, across its musicians and music businesses. Several local musicians and music companies are members of MusicOntario, which is Ontario's provincial music association, but that organization and most of its members are located in Toronto. It remains to be seen if MusicOntario can bring Ottawa's local music industries together from a distance, or whether those in the region would be better served by creating a local bilingual industry association.

MUSIC EDUCATION

Local music education is one of the most important catalysts for Ottawa's music industries.

Graduates of TARA, the audio engineering program run out of Raven Street studios, have started influential music businesses such as Capital Rehearsal Studios and Spaceman Music. Juno Award-winner Kellylee Evans got her start singing in Ottawa's jazz clubs, accompanying members of Carleton's Bachelor of Music program. Kalle Mattson, a celebrated local songwriter now touring the world, moved to Ottawa from Sault Ste. Marie to study at the University of Ottawa's music program. Many local musicians, including songwriter and harmonica player Catriona Sturton, were given the confidence to step on stage after taking lessons with legendary musicians like Larry "The Bird" Mootham at Ottawa's Folklore Centre. And Algonquin's Music Industry Arts program cannot keep up with demand for the 75 spots in a two-year diploma program that combines audio engineering, music production, and music business training (and which has been providing interns to local music companies like Kelp Music). Algonquin also has a one-year music industries certificate program with an additional 80 spots. Graduates from that program often feed into the diploma program.

Then there are the dozens of private music schools: many connected to instrument retailers, some simply providing lessons, others that also provide coaching and the opportunity to record in professionally equipped studios; all of which create teaching jobs for musicians and other music professionals.

One challenge for Ottawa's music industry programs is that the region's lack of full-time, established music companies means that internship opportunities and local jobs for graduates are scarce. Further growth of Ottawa's record labels, promoters, and artist services companies will help provide a more complete education experience and also help to retain graduates in the city.



The Audio Recording Academy (Photo courtesy of TARA)



Dave's Drum Shop, Music Instrument Retail

MUSIC RETAIL

Record stores play a vital role in the local music ecosystem, both as places to buy local releases and to connect with other music fans and find out what is happening around town. Research on alternative music scenes suggests that independent record stores like Ottawa's Birdman Sound, Vertigo Records, or Compact Music encourage greater participation in local music scenes than the national chain music stores;⁷⁸ so it is a positive sign that local independent record stores appear to be not only surviving but growing.

Indeed, while overall physical album sales have been down, one of the interesting developments in the music industries is the surge in popularity of vinyl recordings, which in Canada showed sales growth of 53% between 2013 and 2014.⁷⁹ American sales showed a similar jump of 43%.⁸⁰ The enthusiasm for vinyl has corresponded with the opening of new record stores in the region, including the expanded Record Centre on Wellington and Vinyl Destination in Merrickville, both named to CBC's 2014 list of "Best New Record Stores in Canada."⁸¹ These types of record stores tend to build communities of music listeners around themselves.

The other trend in music retailing is digital streaming/downloading services like Rdio, Spotify, Songza, and Soundcloud, which allow for the sampling of a seemingly infinite amount of music from around the globe for free (with ads) or ad-free with a monthly subscription fee. Sites like Bandcamp allow musicians to sell their music directly to consumers.

While vinyl records and online digital services might seem at odds with one another, both create connections for local music. Streaming allows music to travel the world, finding audiences in unexpected places without the fixed cost of pressing thousands of physical copies; while neighbourhood record stores connect musicians to their local communities via prominent album displays and in-store performances. Many musicians are now pressing small runs of vinyl albums for sale at local stores and live shows, and doing the rest online.

Only two record stores responded to the online survey. Both were small stores with 2-3 full-time employees, in business for more than 20 years. Challenges identified by the stores included getting their name out to the community and competing against streaming services and the internet.

MUSIC INSTRUMENT RETAIL AND REPAIR

Ottawa is home to several long-running music stores, many of which also repair instruments and offer music lessons. The critical role that music instrument stores play in the local music industries ecosystem is perhaps best illustrated in the outpouring of support for the Ottawa Folklore Centre when that store faced economic difficulties in 2014.⁸²

While the Ottawa Folklore Centre is a particularly strong example of a hub for the local music community, all music stores play a role in employing musicians. At Spaceman Music, all of the store's eight staff (seven full-time and one-part time) are musicians; all four of the music stores that responded to the online survey employed 100% musicians.

Stores that offer lessons, such as the Ottawa Folklore Centre and Lauzon Music, also employ dozens of professional musicians as teachers. As one online commenter wrote, "Teaching voice at the Ottawa Folklore Centre helped me put food on the table when I was first getting started as a professional musician."⁸³ For full-time musicians who filled out the online survey, teaching music was only second to live performance in terms of economic importance.

Music stores are, therefore, key sites for music education, both through the formal instruction of music lessons, and in the informal space of the music store itself. As places where musicians work, many with post-secondary music education,⁸⁴ music stores are places to learn about music equipment (what is available, how to use it and how to talk about it) as well as places to learn about how to participate in local music scenes. Located throughout the city, music stores serve to connect aspiring musicians in outlying areas with more downtown-focused music scenes.

Of course, music stores are primarily places to buy musical instruments and have them serviced. The local accessibility of high-end instruments, top-notch repair services, as well as the rental of equipment for recording and touring (available, for example, at Long & McQuade) are important resources for serious local musicians. Music stores are also outlets for locally made instruments and equipment. Stores like Spaceman and Lauzon are outlets for Ottawa's growing sub-sector of guitar effects manufacturers.⁸⁵

Of the four music stores who responded to the survey, the average length of time in business was more than 10 years. Stores averaged four full-time employees with an additional 1.5 part-time employees. All respondents felt that Ottawa was getting better as a place to operate a music business.

The biggest challenges noted by these music businesses were competing with chain and big box stores and maintaining a niche business in a smaller market. One store also noted difficulty connecting with the local business association, having had their application turned down for being a half a block away from the BIA boundaries.

MUSICAL INSTRUMENT MANUFACTURING

The Ottawa-area is home to several small-scale, high-end music instrument and equipment makers including Fairfield Circuitry, Sage Electronics, and Tetra Speakers. Renowned luthier Linda Manzer, who has made guitars for musicians like Pat Metheny, Paul Simon, and Gordon Lightfoot, has also recently moved to Almonte where she has set up a studio with local luthier Peggy White.⁸⁶

Such music instrument makers create valuable local jobs, often for other musicians, but arguably their most important contributions to the local music industries is in building local technical knowledge and in making Ottawa known as a place for world-leading vision and craft.

Indeed, like musicians, musical instruments travel far and wide, carrying the name of their hometown along with them. The website of Fairfield Circuitry, a designer and manufacturer of sought-after guitar effects pedals that are sold around the world, proudly states: "Unique & Robust. Made in Hull, Québec." When legendary musicians like Herbie Hancock use Tetra Speakers in their studios (and rave about them to other musicians),⁸⁷ Ottawa becomes part of a larger narrative of music excellence.

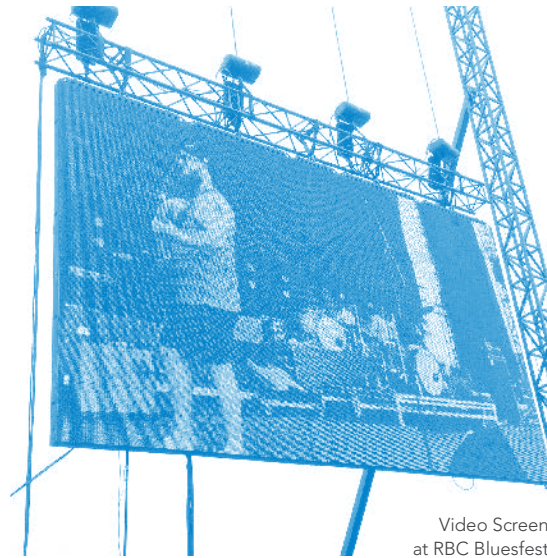
Like other knowledge-based industries (including music companies that focus on artist development) the success of pioneering businesses encourages further local growth as the original innovators share knowledge with those they work with, some of whom go on to form their own businesses. This can be seen most clearly in the recent growth of Ottawa's guitar effects pedal manufacturers, a niche industry with a global market.⁸⁸ The owner of Fairfield Circuitry pointed out that 90% of the company's pedals are destined for international sales.⁸⁹

Five instrument/equipment makers answered the online survey. While one company had between 6 and 10 full-time employees, the rest were small with 3 or fewer full-time employees. All companies also employed an additional 2-4 part-time employees. An average of 75% of employees were musicians. Companies ranged from 3-5 years to over 20 years in business. Only one of the surveyed companies indicated they belonged to a business association, the National Association of Music Merchants (NAMM).

Noted challenges included: a lack of affordable commercial/workshop spaces in local urban areas, competing in the US against US manufacturers, and a lack of local retailers catering to their product niche. Overall, there was a sense of local pride and sense that there should be broader support for "homegrown talent," not just for musicians, but also for musical instrument makers.

LIVE MUSIC SUPPORT

There are a variety of businesses in the Ottawa area that support the live music and festival industries, including sound and lighting, security, volunteer coordination, and postering. While these businesses are sometimes overlooked in music industries studies (including in our online survey), it became clear from talking with those involved in putting on local music events how integral these businesses are to the local ecosystem. These businesses are also useful indicators of the broader economic impact of the local music industries, growing as they do out of demand from core activities such as concert promotion.



Video Screen
at RBC Bluesfest

Larger businesses in this sub-sector include Wall Sound & Lighting, which provides sound, lighting, and technical support for area festivals and concerts, and Toersa Security, which “specializes in the handling of alcohol-related issues at events and festivals.”⁹⁰ As noted earlier, Toersa grew out of RBC Bluesfest’s requirements for specialized support around the serving of alcohol during the festival. The company now also handles security at several downtown Ottawa venues.

Another local business with roots at Bluesfest is Kamp Operations, an event operations company that trains and coordinates volunteers and first aid staff for festival events and provides security services for smaller scale venues such as House of TARG. Kamp Operations’ capacity to manage the broader operations of running an event—skills learned through the founders’ work at Bluesfest—has helped festival clients such as Arboretum and House of PainT “scale up” and manage new growth. The business has also grown to serve non-music events such as Nuit Blanche and the National Craft Beer Festival.⁹¹

Postering Ottawa is another example of a local business with roots in the music industries but that serves clients in other local creative sectors. Started in January 2014, the business provides printing and postering services, helping artists, venues, and concert promoters quickly get the word out about upcoming live music events. The business has also recently added graphic design as a service. According to the owner, who has been involved in Ottawa’s live music scene for the past 10 years, music represents 60% of its overall clients.⁹²

Businesses like Kamp Operations and Postering Ottawa illustrate the entrepreneurial nature of the music industries, and how music activity creates important spillover effects for local communities, including job creation, the development of new areas of expertise, and the fostering of connections among various local industries.




MEDIA

Like the music industries, local media outlets for music include a wide range of professional and semi-professional activity from large private radio broadcasters and daily newspapers to local blogs and music “zines” operated by music fans on a part-time basis. Much of the connecting tissue at the local level appears to come from the smaller-scale media outlets.

When asked which media outlets were most important for publicizing their work, local musicians ranked the following:

- Campus and community radio (40%)
- Local blogs (39%)
- CBC Radio (27%)
- Daily newspapers (18%)
- Commercial radio (12%)
- Local television (10%)

Many musicians also noted that social media and word of mouth were the most important way of publicizing their work.



When looking only at the answers of full-time musicians, who presumably have the most access to the media, CBC becomes much more important. For full time musicians, the most important media outlets for publicizing their work are:

- Local blogs (39%)
- CBC Radio (38%)
- Campus and community radio (34%)

Perhaps surprisingly, commercial radio is in last place (11%). One respondent wrote: “Theoretically, I think commercial radio would be very important, but they don’t actually play my work.”

Private radio broadcaster Live 88.5 has made an impact on the Ottawa scene with its Big Money Shot contest, which has given sizeable cash prizes to local artists like Hollerado and Amos The Transparent. However, for the vast majority of local part-time and full-time musicians, commercial radio is not viewed as a viable outlet. While private broadcasters support the emerging industry by contributing money to FACTOR and talent development projects like the Big Money Shot, the tightly formatted structure of commercial radio broadcasting appears to leave little room for programming local emerging artists, which in turn means these stations are less connected to the local ecosystem than public or campus radio. More research is needed to see whether this is also the case for French commercial stations.

Another of the findings of the online survey was that musicians and music businesses feel that an “arts weekly” is sorely needed to bridge the gap between audiences who are already in the know and broader audiences in the city. Allan Wigney, editor of the city’s last weekly, which shut down in 2012, says of the Ottawa X Press:

“Its importance during its early years is hard to overstate: a number of bands and performers received their first press from *X Press* and the paper’s popularity among locals arguably forced the mainstream dailies and radio stations to recognize the depth of talent here. During its 10-plus years on the scene, *X Press* provided a key outlet for local music to receive its due.”

Filling that gap to an extent are the local blogs that have come on the scene in recent years, including Apt. 613 and Ottawa Showbox. Judging by the response from local musicians, these have made a major impact in terms of coverage. Two print publications that feature music are also being published regularly: the glossy quarterly Herd Magazine and the scrappy monthly Small Talk. However, as noted in several interviews and surveys, these are best at reaching already-engaged audiences, and fail to capture the broad Ottawa-wide audience of a daily or weekly paper.

Finally, CKCU, CHUO, CKDJ, and CJFO—the city’s campus and community radio stations—are some of the most important hubs of music activity, playing local music, sponsoring local music events, and acting as an incubator of local journalism talent.

The local media landscape is complex and it is clear that more research is needed to understand how the different types of media connect with and support the local music industries.

7.0 BENCHMARKING OTTAWA'S MUSIC INDUSTRIES

We have the best festivals. They're just getting better and better every year... I think perhaps if we are lacking anything, it's venues. Differently sized venues. ~ KELLYLEE EVANS, JUNO-WINNING JAZZ VOCALIST ~

As part of this project, the research team undertook the following exercise to:

- Provide benchmarks against which the future growth of the Ottawa music industry can be measured
- Compare the development of Ottawa's music industry cluster to comparable cities

The best practices of economic geography tell us to benchmark Ottawa against cities of similar size. Population is the main consideration in this type of comparison because so many factors important to music clusters are size- and density-dependent: economies of scale, economies of scope, division of labour, and agglomeration. We chose to benchmark Ottawa against its Canadian peers with regional populations of 500,000 to 1.5 million. We include suburbs in all our datasets because they're part of the same regional economy as the central city.



There are six city-regions that fit the bill:

Calgary (regional pop. 1.36 million) – Calgary is neck-and-neck with Ottawa for fourth-largest city in Canada, is experiencing tremendous economic growth, and its arts scene and institutions attempt to make an impact on the national stage. The city is home to major events like the Calgary Stampede, Calgary Folk Festival, and Sled Island.

Edmonton (regional pop. 1.29 million) – As the capital of Alberta, it shares Ottawa’s status as a “government town.” And like Ottawa, while there are musicians and venues doing exciting things all over the scene, it doesn’t possess a distinct musical identity on the national stage. But Edmonton still retains a print newsweekly that energizes its scene: *Vue Weekly*.

Winnipeg (regional pop. 771,000) – Its time as a railway boomtown dubbed “Chicago of the North” built up a dense city centre around the Exchange District and generated lots of old, re-purposable buildings. A hundred years later, the neighbourhoods spawned by that era have become home to lots of musicians, and to venues like The Folk Exchange and Union Sound Hall. Winnipeg is a steady grower that serves as the regional hub for all of Manitoba and northwestern Ontario. It also boasts Canada’s highest proportions of Aboriginal and Filipino residents.

Hamilton (regional pop. 758,000) – An interesting and unique city, both for its close proximity to Toronto, the centre of Canada’s music industries, and for its preponderance of aged, inexpensive former industrial buildings—a resource that Ottawa has in much shorter supply. Supercrawl is an annual free music festival that attracts 100,000 people to a revitalized strip of the James Street North neighbourhood. It grew out of the monthly Art Crawl events, popular grassroots “block parties” of art and music when galleries, studios, shops, and restaurants keep their doors open late and attract large crowds.

Ottawa-Gatineau (regional pop. 1.31 million) – The region possesses one of the most educated populations in North America,⁹³ a concentration of high-tech businesses, and all the amenities of a national capital. It also has the linguistic diversity you’d expect of a city on the border between Ontario and Québec. But it’s not a city that’s known nationally for its music, and people outside Ottawa seem hard-pressed to describe Ottawa’s scene.

Québec City (regional pop. 792,000) – Another government town. It’s unique in our analysis for the way the vast majority of residents (about 95%) are Francophone. Québec City’s Summer Festival features massive outdoor concerts on a dramatic main stage on the Plains of Abraham, attracting over 1.5 million people per year.

BENCHMARKING REGIONAL MUSIC INDUSTRIES

The data collected here depicts a region's performance across three categories of musical assets:

- Musicians
- Businesses & Institutions
- Live venues

To calculate the overall ranking, we drew on these three measures to compute each region's score on our Music Industries Index. Overall, the Index measures the extent to which a city-region's music industries have developed and grown. It's calculated by totalling the reverse rank-order of each of the three components, weighting each one equally. So, for example, if a city-region scored #1 (of 6 cities) on each of the three components, its score would be $6 + 6 + 6 = 18$ (the maximum possible score). This method translates the different scales of each component metric into a directly comparable score.

A detailed explanation of the datasets used to calculate the indices is included in the appendix at the end of the report.

Musicians

This component combines two Statistics Canada datasets. The first, census-reported musicians per 100,000 residents, draws on data from the 2006 census's long-form survey. It counts the residents of each city-region who reported their occupation as a musician, singer, or composer. Unfortunately, more recent 2011 census results are unusable due to the replacement of the long-form survey with an optional survey with a much larger margin of error.

We compensate for this weakness by incorporating equally weighted results from Statistics Canada's Canadian Business Patterns survey (2013-14). This figure captures the musical groups in each region that have registered as businesses—that is, bands' and artists' earning revenue and reporting income earned from music.

Region	Census-reported musicians per 100,000 pop.	Musical Groups & Artists locations per 100,000 pop	Musicians ranking
Winnipeg	142	8.8	1
Calgary	145	6.6	2 (tie)
Edmonton	127	9.6	2 (tie)
Hamilton	127	8.6	4
Ottawa-Gatineau	131	6.2	5
Québec City	98	7.7	6

The results for musicians place Winnipeg and the major cities of Alberta at the top. Ottawa's ranking is hurt by its last-place score in Musical Group businesses.

Business & Institutions

This metric looks beyond musicians to the recording studios, licensing companies, and record labels that keep the industry running. Once again, these figures come from Statistics Canada's 2013-14 Canadian Business Patterns survey, adjusted per capita to control for differences in population. We add other music-related businesses captured by the same survey to our measure—musical instrument shops, recorded music wholesalers, and disc manufacturers—but weight them half as much in our rankings, as they're not directly involved in the core businesses of artist development: writing, recording, releasing, and performing music.

Region	Sound Recording Industry locations per 100,000 pop. (full weight)	Other Music-related Industry locations per 100,000 pop. (half-weight)	Businesses & Institutions ranking
Québec City	5.1	3.7	1
Calgary	3.9	4.2	2
Winnipeg	4.1	3.5	3
Hamilton	4.0	3.4	4
Edmonton	2.8	3.5	5
Ottawa-Gatineau	2.0	3.9	6

Once again, Ottawa scores poorly. It has the least activity of any mid-sized Canadian city in the core activities of the music business: studios, labels, and publishers. Calgary and Winnipeg perform well again, scoring near the top of the rankings.

Live Music

To measure the live performance activity in a region, we examined many different datasets. The most complete was the venue database of PollStar, the live music industry's trade publication. Our searches captured every venue within 10 miles of each region's central city, and the results are very complete—the Ottawa dataset included everything from the Canadian Tire Centre to small, community-minded venues like Gabba Hey, a live venue that operates on a part-time basis in the City Centre complex. Capacity figures were available for only one-tenth of the venues, so we weighted every venue equally regardless of size. Our reasoning is that more venues means more musical activity, and a small, adventurous venue can easily be as important to a music scene as a giant arena.

Region	Music venues per 100,000 pop.	Live ranking
Winnipeg	24.4	1
Calgary	22.6	2
Edmonton	21.2	3
Ottawa-Gatineau	19.54	4
Hamilton	19.52	5
Québec City	18.2	6

Winnipeg and Calgary continue their strong performance on this measure, while Ottawa is in the middle of the pack.

Music Industries Index

To calculate the overall Music Industries Index for each region, we sum the component rankings. The results are as follows:

CA/CMA	Musicians rank-score	Business & Institutions rank-score	Live rank-score	Sum of rank scores	Music Industries Index rank
Winnipeg	6	4	6	= 16	1
Calgary	4	5	5	= 14	2
Edmonton	4	2	4	= 10	3
Hamilton	3	3	2	= 8	4 (tie)
Québec City	1	6	1	= 8	4 (tie)
Ottawa-Gatineau	2	1	3	= 6	6

Winnipeg and Calgary rank at the top of the Index, significantly outpacing all other regions. Ottawa-Gatineau places last.

BENCHMARKING FUNDING

The Foundation to Assist Canadian Talent on Recordings (FACTOR) generously supplied us with anonymized funding data for English-language cities in our benchmarking exercise (2013-2014 fiscal year). With funding for Francophone artists handled by a different organization (MusicAction), we did not include Québec City in this comparison.*

The FACTOR data supports our finding that Winnipeg is outperforming other cities its size in developing its artists. Ottawa once again underperforms in this area, tying for last place.

City	Applications	\$ Offered	2011 Population (Statcan CMA)	Applications per 100,000 residents	\$ per resident
Winnipeg	106	\$402,926	746,100	14.2	\$0.54
Edmonton	88	\$329,332	1,206,000	7.3	\$0.27
Calgary	108	\$238,381	1,264,500	8.5	\$0.19
Ottawa (Ontario only)	54	\$148,359	921,823	5.9	\$0.16
Hamilton	51	\$120,649	742,500	6.9	\$0.16

Perhaps the most important finding from this data is that those in Ottawa are submitting far fewer applications on a per capita basis than cities like Winnipeg. This corresponds to additional anonymous data we received from FACTOR showing that Ottawa has fewer overall musicians and businesses in the organization's system.

With our survey showing that there is indeed a large amount of musical activity taking place in the city, we need to ask what is preventing such local activity from better connecting with provincial and national funding bodies. One explanation is that those in Ottawa are simply less aware of what is available and/or how to become eligible to apply—knowledge that might be better circulated with the presence of a local music association.

*This also means that this comparison does not include funding for Francophone artists applying to MusicAction rather than FACTOR.



Analysis

From our on-the-ground research, we know there is excellent, compelling music being made across the Ottawa region. But the benchmarking results suggest this activity is not translating into the scale of musical activity and businesses that the region is capable of.

One thing that stands out about Winnipeg and Calgary, which consistently score well across all three components, is that they play the role of music hubs to wider areas. There are few major cities close to Winnipeg, so it attracts the attention of the musically-inclined across a fairly large swath of the country: from musicians to entrepreneurs to fans. Calgary is only a few hours from Edmonton, but it has asserted itself as the economic and media hub for much of the space between Vancouver and Winnipeg. That seems to have helped it punch above its weight in musical activity.

The cities with the lowest volume of musical activity—Ottawa-Gatineau, Hamilton, and Québec City—have one thing in common: they're each relatively close to a media centre with a much larger population. Ottawa is in between two: Toronto and Montreal. Major centres also tend to attract the provincial and national music associations that engage in a symbiotic relationship with music clusters.

There are two major conclusions that can be drawn from this dataset. The first is that analyzing Canada-wide, publicly-available datasets, we consistently find that the volume of music activity is lower in Ottawa than its peers. Particularly in the core activities of the music industry, like recording, licensing, and releasing. That doesn't mean Ottawa's music scene isn't any less compelling or captivating, but it does mean there's less going on at the measurable, industry level.

The second conclusion is that there appears to be a negative relationship between the amount of activity in mid-sized regions and their proximity to the largest Canadian cities. It's a dynamic we can use to inform how we think about Ottawa's present-day status in the system of Canadian music cities.

For Ottawa and other second-tier cities, our findings point to the importance of working to strengthen pipelines to those industry centres. It is by strengthening these connections that we can create pathways for serious part-time musicians to pursue full-time careers, and for full-time musicians to reach the full potential of their talents. Without concerted action to better connect Ottawa to knowledge, expertise, and investment, our region's musicians and businesses will continue to face an uphill battle in transforming independent activity into more ambitious growth.

Conclusion: The Importance of Music Industry Clusters

One of the best ways to evaluate regional economic development is to look for “industry clusters”—the number of similar businesses in a region. Industry clusters attract resources, investment, and talent to an area, with Silicon Valley and Wall Street two of the best examples of the benefits of skilled people bumping into each other. Industry clusters and proximity inspire knowledge sharing, which leads to new ideas, new partnerships, and new businesses.

The phenomenon of clustering was first described in 1890 by Alfred Marshall:

“When an industry has chosen a locality for itself, it is likely to stay there long: so great are the advantages which people following the same skilled trade get from near neighbourhood to one another. The mysteries of the trade become no mysteries; but are as if it were in the air.”
~ ALFRED MARSHALL⁹⁴ ~

Industry clusters are particularly important to the development of creative sectors because so much creative business activity happens in social situations.⁹⁵ The chance for players in the industries to meet casually, something increased by having a lot of musicians and music entrepreneurs in one area (think Los Angeles for filmed entertainment), improves the productivity of the cluster.

The importance of industry knowledge, produced and circulated via the networks of music industry clusters, cannot be overemphasized. Many talented musicians and music businesses struggle to figure out how the music industries work, how to take advantage of their intellectual property (songs), how to adapt to changing technology, how to find funding and resources, how the industries are connected—these are all “mysteries of the trade.”

Furthermore, Canada’s history of government intervention in the industries has created new types of knowledge that need to be developed; there is a lot of support available, but only if one knows how to go about accessing it. The dominance of Toronto-based businesses that received funding in the 2013-2014 round of the Ontario Music Fund⁹⁶ should be seen, therefore, partly as the outcome of a larger concentration of music industry in Toronto, and partly as the outcome of a strong industry cluster where knowledge about how to leverage such initiatives is “in the air.”

Our Music Industries Index is a way to gauge clustering activity. The results of the benchmarking confirm what we know about industry clusters and the larger findings of our research: Ottawa’s lack of music businesses involved in artist development and lack of connecting infrastructure—mid-sized venues to draw out-of-town acts, broad-based media to connect local audiences, advocacy organizations to bring music people together—translates into less business and less knowledge in the air.

Research shows that it is incredibly difficult to build music clusters from the ground up (see the example of Sheffield, UK) but as our industry profile demonstrates, Ottawa is already well on its way: we have a lot of music-making activity, a lot of talent, and a local buzz. What is needed now are more connections, locally and between the city and other national and international hubs. Indeed, research shows that one of the ways that is effective in stimulating cluster activity is in building “pipelines” to other centres of expertise as a way of creating local knowledge growth.⁹⁷ Which leads to our recommendations.

8.0 RECOMMENDATIONS

My feeling is that we also have an opportunity to create a model, but create it more from a grassroots level. Instead of saying we're going to bring music conventions to Ottawa, or bring another festival or whatever, I think there is a real opportunity here to bring together what we already have, and to promote other artists to locate here. ~ MARK MONAHAN, EXECUTIVE DIRECTOR, RBC BLUESFEST ~

Ottawa is its own city, with its own talents, and, given the right conditions, it will continue to develop its own unique music cluster. The question today is how to create and support those conditions. As one of the founders of Austin's SXSW remarked, the best way to develop a city's music cluster is to start by: "Bringing people together, giving them the ability to know each other and to build together."

We are proposing a limited set of key recommendations we think are the first steps toward creating the connections required to grow Ottawa's music industries.

Recommendation 1 – A New Organization to Bring Together and Advocate for Ottawa Music

We recommend that key Ottawa music entrepreneurs and organizations form a permanent institution whose mandate is to bring the music community together for collective action. We see the mandate as including:

- 1.** Strengthen connections within Ottawa’s music community, specifically its musicians and music businesses.
 - a.** Foster a common cause across genres, languages, neighbourhoods
 - b.** Improve information-sharing among musicians and businesses
 - c.** Track metrics as Ottawa’s music community changes over time
 - d.** Develop a fuller picture of the economic impact of local music
- 2.** Build connections between Ottawa’s music community and other regional institutions, including government and business.
 - a.** Represent the interests of the music community
 - b.** Advocate for the most effective types of support
 - c.** Encourage local businesses to invest in local music
 - d.** Explore opportunities for collaboration
- 3.** Connect Ottawa’s music community to the global music industry.
 - a.** Advocate for Ottawa’s music community at national institutions
 - b.** Facilitate exchanges with more prominent music clusters
 - c.** Lead delegations to trade shows and festivals (e.g. MIDEM, SXSW)
 - d.** Promote Ottawa’s music cluster to outsiders

We believe this institution could take various forms: it could be an Eastern Ontario chapter of MusicOntario, or it could be a standalone institute for the region. Whatever the specific structure, it needs to be driven at the grassroots level by those who make and earn income from music, and it needs to maintain strong relationships with the local and provincial governments.

This institution should work toward having its own physical space, one that’s easy to access by musicians and music businesses from across the city for meeting, collaborating, accessing information, and workshops (e.g. how to open a music venue, how to apply for a touring visa). It will be a widely-recognized hub for music across the Ottawa region.

Recommendation 2 - A Music Strategy for the City of Ottawa

Given the level of musical activity in the city, music's role in making Ottawa a great place to live and visit, and its potential as a catalyst for the creative and tech sectors, we believe the City of Ottawa should develop an official Music Strategy, with input from a Music Advisory Council consisting of local musicians and music entrepreneurs.

A music strategy would recognize music as a priority for economic development, and place existing initiatives (like #ottmusik) within an ongoing plan for supporting music in the Capital. It would also help those in the music industries better pursue opportunities such as those provided by the Ontario Music Fund.

The following principles should be at the core of this strategy:

1. Acknowledge the value that music provides to the city, and consider it in municipal policy and decision-making. Create a formal mechanism for consulting with the music industries on important issues related to industry development.
2. Support the conditions for creative risk-taking in the music industries. Make it easier for new music projects, collaborations, and entrepreneurs to start up.
3. Recognize the availability of flexible spaces for music (both performance and other music activities) as a key ingredient for music industry growth. Create and safeguard spaces for music in the city.
4. Facilitate connections between musicians and audiences; between music and other industries; between Ottawa and other music clusters; between different scales of activity.
5. Spread strategic investments across multiple smaller initiatives instead of a few large ones. As in venture capital, it's difficult to predict in advance which music initiatives will be most successful.

Recommendation 3 – A Point Person for the Music Industries

We believe that a step that can be taken immediately is for the City of Ottawa to assign a point person to work in collaboration with the local music industries. This staff person would be a centre of expertise and act as a pipeline of information from the industries to the City and vice versa.



IDEAS FOR MUSIC POLICIES

The following are five diverse ideas to help kickstart discussion about the scope and content of an Ottawa Music Strategy. Their goals are to bring music people together, improve conditions for creative risk-taking and entrepreneurship, and inspire wider participation in Ottawa music.

1. Park Music

Music in new and unusual spaces delights audiences and supports an atmosphere of creativity. By opening its parks to local performers at appropriate times—like summertime Saturday evenings—the city’s public spaces can become a showcase for emerging local talent and build a unique new local tradition. Performers would be able to use these informal concert spaces free of charge on a first-come, first-served basis.

2. Open for (Music) Business

Creating a fertile environment for music entrepreneurs to thrive is key to encouraging a more robust local music ecosystem. Ottawa’s municipal government should develop policies and enforcement practices that work alongside local music businesses to solve zoning, noise, and other issues that discourage music. Municipal government has a role to play in encouraging spaces for music, and local industry has an opportunity to partner with local music on mutually beneficial initiatives.

3. Creative Parties

Informal social interactions are one of the most powerful connective forces in creative industries. A recurring party series that brings together people from across music, games, design, film, and other creative endeavours would become a hub for information-sharing and new partnerships, and help position local composers, musicians, and studios as the go-to source for local media projects. It could remain fresh by moving to a different location in the region each month, with local musicians DJing to provide the soundtrack.

4. Night Transit

With the launch of the Confederation Line light rail transit system, Ottawa has the opportunity to improve nighttime connectivity across the region. Upgrading the network and frequency of late-night public transit until at least 2 a.m. on key rail and bus lines—as Edmonton, Toronto, and London have done—would leverage Ottawa’s transit investment to increase participation in live music and improve conditions for a vibrant city nightlife.

5. Youth in Studio

Encouraging youth participation in music has a wide range of benefits and outcomes, including educating the next generation of musicians and music entrepreneurs as well as building new audiences for local music. Ottawa’s numerous recording studios provide an opportunity to create a youth engagement program connecting aspiring musicians and producers with skilled studio engineers.

9.0 FURTHER RESEARCH

This project provides a baseline for future research on Ottawa's local music industries. The following are potential areas for further research.

ECONOMIC IMPACT

Our report identified a wide range of commercial music-making activities that contribute to Ottawa's economy. But Statistics Canada data on the economic size of the music industries is only available at the national and, at times, provincial level. More research is needed to estimate the size and follow-on effects of Ottawa's music economy. An economic impact report using widely-accepted multiplier methodology would be a logical next step.

POLICY INVENTORY

While this report cited policy initiatives pursued by other municipalities, it focused on building a detailed profile rather than developing specific policy recommendations. An opportunity clearly exists for follow-up research that evaluates a more exhaustive set of strategic policy options available to municipalities, how they intersect with City of Ottawa initiatives like the Culture Plan and Economic Development priorities, and how to best execute them.

TRACKING METRICS

This report created three standard indicators using Statistics Canada data to benchmark Ottawa's music industries against similar Canadian cities: *Musicians*, *Music Businesses*, and *Live Music*. They could serve as the foundation for an expanded set of tracking metrics that would monitor the health of the local music industries over time. Refining and repeating the online survey used in this report (e.g. at five-year intervals) is an opportunity to add qualitative data and more fine-grained, neighbourhood-level measurements to the tracking metrics.

CAREERS IN MUSIC

Every music scene is the sum of the individual careers of umpteen musicians. This report reveals a very broad range of semi-professional and professional engagement in local music-making, with the majority of musicians working part-time. More research is needed to understand the pathways for career development, and whether there are ways to encourage part-time musicians to transition to full-time music-making while remaining in Ottawa.

THE MICROGEOGRAPHY OF OTTAWA MUSIC

Our report shows that while downtown neighbourhoods are the focal point of Ottawa's music industries, musicians and music businesses exist across the city, the suburbs, rural areas, and on the Québec side. More research is needed to understand how factors like real estate values, public transportation, key venues, and education institutions, for example, contribute to where music happens in the city, and how the region's geographically-dispersed music communities can be better connected.



The Audio Recording Academy
(Photo courtesy of TARA)

VIABILITY OF ARTS WEEKLIES AND MID-SIZE VENUES

Local musicians and businesses consistently identified a lack of mid-sized venues and a lack of an arts weekly as two significant weaknesses in Ottawa's music ecosystem. Some questions that need to be answered are: Under what circumstances are these businesses viable in a city the size of Ottawa? What are the range of successful business models out there? To what extent do they provide a competitive advantages to cities?

MUSIC ASSOCIATIONS

The results of our benchmarking exercise suggest provincial music associations might be playing a role in building healthy local music industries in cities like Winnipeg, Calgary, and Edmonton. Other vibrant music cities, such as Halifax, also host strong provincial music associations. What mandate and structure would be best for an Eastern Ontario or National Capital Music Association, and what best practices can it learn from the successes of similar organizations in Canada and around the world?

APPENDICES

APPENDIX A – METHODOLOGY

Datasets used to compute benchmarking:

Musicians benchmarking:

Census-reported musicians per 100,000 residents (2006 Census)

Aggregated for each CMA:

- F032 Conductors, composers and arrangers
- F033 Musicians and singers

Source: “Topic-Based Tabulation: Occupation - Standard Occupational Classification 1991 (Historical) (707), Age Groups (12A) and Sex (3) for the Labour Force 15 Years and Over of Canada, Provinces, Territories, Census Metropolitan Areas and Census Agglomerations, 1996 to 2006 Censuses - 20% Sample Data” (Statistics Canada), accessed November 10, 2014, [*Statistics Canada’s Canadian Business Patterns survey \(averaged June 2013-June 2014 figures to reduce noise, adjusted per capita using Statistics Canada 2013 CMA population estimates\)*](http://www12.statcan.gc.ca/census-recensement/2006/dp-pd/tbt/Rp-eng.cfm?LANG=E&AP-ATH=3&DETAIL=0&DIM=0&FL=A&FREE=0&GC=0&GID=0&GK=0&GRP=0&PID=92105&PRID=0&PTYPE=88971,97154&S=0&SHOWALL=0&SUB=743&Temporal=2006&THEME=74&VID=0&VNAMEE=&VNAMEF=.”</p></div><div data-bbox=)

Aggregated for each CMA:

- NAICS 71113 - Musical Groups & Artists

Source: “Canadian Business Patterns, 1988 - 2013” (Statistics Canada), accessed November 25, 2014.

Businesses & Institutions benchmarking

Statistics Canada’s Canadian Business Patterns survey (averaged June 2013-June 2014 figures to reduce noise, used Statistics Canada 2013 CMA population estimates)

Aggregated for each CMA:

- Sound Recording Industry locations (full weight):
 - NAICS 512210 - Record production
 - NAICS 512220 - Integrated record production/distribution
 - NAICS 512230 - Music publishers
 - NAICS 512240 - Sound recording studios
 - NAICS 512290 - Other sound recording industries

- Other Music-related industry locations (half weight):
 - NAICS 334610 - Manufacturing and reproducing magnetic and optical media
 - NAICS 414440 - Sound recording merchant wholesalers
 - NAICS 451140 - Musical instrument and supplies stores

Source: “Canadian Business Patterns, 1988 - 2013” (Statistics Canada), accessed November 25, 2014.

Live Music benchmarking

Music venues per 100,000 residents (2013 Statistics Canada CMA population estimates)

PollstarPro database (aggregated totals for each city, within 10 miles).

Funding benchmarking

FACTOR custom tabulation (2013-2014 data)

Compiled by aggregating 2006 postal code FSAs to Statistics Canada CMAs (changes in postal code area have been trivial during the period)

Interviews


Jon Bartlett	Nadia Kharyati	Amanda Rheume
Natalie Bernardin	Rolf Klausener	Pierre Richardson
Michel Bénac	Luke Martin	Robin Moir
John Carroll	Tito Medina	Tom Stewart
Phillipe Charbonneau	Colin Mills	Alanna Stuart
Michael Dubue	Mark Monahan	Catriona Sturton
Kellylee Evans	Gary Morton	Scott Terry
Guillaume Fairfield	Shannon Murray	Menno Veersteeg
Olivier Fairfield	Louis Myers	Dean Watson
Harvey Glatt	Albert Porter	
Eugene Haslam	Tim Potocic	

Online Survey

A set of three online surveys—one directed at local musicians, one directed at music businesses, and one specifically directed to live music venues—ran during the last two weeks of October 2014.

The surveys were hosted online by Survey Monkey and made available in English and French. The surveys were publicized over social media, primarily Facebook, by members of the Ottawa Music Industries Consortium. A member of the consortium also appeared on CBC Radio to discuss and promote the survey. Respondents were encouraged to share the surveys.

The goal of the surveys was to get a broad sense of the level and type of music industry activity in the city, to gauge the mood of musicians and businesses towards the future of the local industries, and to gather feedback on strengths, weaknesses, and opportunities for the industries.



The musician-focused survey also looked for differences in engagement and experience based on whether the musician defined him or herself as a full-time musician, part-time musician, or amateur/semi-professional.

Response

The musician survey in English received far and away the best response with more than 500 responses in the first two days of being posted.

Musicians

- 778 English responses
- 34 French responses

Music businesses

- 58 English responses
- 9 French responses

Live venues

- 23 English responses
- 1 French response

APPENDIX B – A BRIEF HISTORY OF OTTAWA MUSIC

By Allan Wigney, Former Editor of the Ottawa X Press

Is there an Ottawa sound?

Local musician Dick Cooper, who together with brother Brian enjoyed international success in the 1970s, believes there is.

“The vocals were always emphasized,” he says of the 1960s and ‘70s bands that paved the way for a thriving local music scene. “Not just The Staccatos and Five Man [Electrical Band] or The Townsmen. It wasn’t like Toronto where you had the ‘Arctic-R&B’ influence and the guy out front and nobody else sang. We always looked for guys that could sing, because we wanted to do the harmony thing.”

Indeed, the influential local artists of Ottawa’s early popular music scene were nothing if not harmonious. It may have been an extension of the harmony-laden country music that in the 1950s had put the Ottawa Valley on the national map, courtesy of area band-leaders like Mac Beattie, Joe Brown and Ron McMunn. By the early 1960s, numerous Ottawa Valley country artists were recording and touring across Canada and in the United States.


Meanwhile, rock and roll had changed the local scene, inspiring teenager Paul Anka to try his luck Stateside. Here at home, bands were drawing their inspiration from UK sensations Cliff Richard and The Shadows. Harmonies still ruled, abetted by the twang of electric guitars, as the likes of The Esquires and The Staccatos played community centres and high schools to a growing fanbase.

In 1964, rock and roll in Ottawa changed, as it did worldwide, in the wake of The Beatles’ success. The Esquires and The Staccatos would lead the way for the remainder of the decade, earning contracts with The Beatles’ label Capitol Records and releasing acclaimed singles and albums that would top the all-important CFRA chart. Chart success would also come the way of contemporaries such as The Five D and The Townsmen, as local bands made their presence felt alongside international heavyweights.

An active scene was, however, poorly represented on disc, as other than the fledgling Sir John A Records, no local label existed to release material by the many bands playing a variety of venues in Ottawa and the Outaouais. Moreover, no professional studio was available locally, artists instead having a choice of recording crude demos at Hy Bloom’s electronics store, or travelling to Montreal to take advantage of a “proper” facility.

The Esquires would make one of the country’s first music videos; The Staccatos would represent Eastern Canada on a nationally-distributed salute to Canadian music called *A Wild Pair*. (Western Canada’s chosen band: The Guess Who.) By the end of the 1960s, The Staccatos would become The Five Man Electrical Band, soon to achieve massive international success with *Signs*.

As for that harmonious Ottawa sound, U.S.-signed 3’s a Crowd and great lost local band The Children would help to keep it alive, even as members Neville Wells, Peter Hodgson, David Wiffen and Bruce Cockburn would head in different directions at the dawn of the 1970s - Wells and Hodgson would drift back to country music; Wiffen and Cockburn would breathe new life into Canada’s folk music scene.



With the 1970s came Canadian-content requirements for radio stations. And to Ottawa-based artists like pop singer James Leroy, country artist Colleen Peterson and rock band Octavian came national exposure on an unprecedented scale. Maintaining that Ottawa sound, The Family Brown hosted an internationally syndicated TV show while The Cooper Brothers brought country, rock and harmony together to great effect on the hit song *The Dream Never Dies*.

The harmony would be pushed aside toward the end of the 1970s, as punk rock brought individual voices to the fore. Local rock clubs flourished, catering to demand for seminal punks The Red Squares, The Action and The Restless Virgins. By the early 1980s, indie-rock had come to Ottawa, and clubs like The Downstairs Club were filled to capacity each week by bills topped by local performers.

The scene – and the city – were expanding and diversifying, with country and rock now sharing space with blues, reggae and jazz. Live music was alive and well in Ottawa and in Hull. Locals were still placing records in the charts – now the domain of FM stations like CHEZ (launched by local mover and shaker Harvey Glatt) and community radio station CKCU. Electro-pop acts Eight Seconds (*Kiss You*) and One to One (*Angel in My Pocket*) broke nationally with the aid of slick videos. Hard-rock bands like Fist and Exciter found success overseas. And in the shopping malls and on TV screens, Alanis Morissette was honing her vocal skills.

Alanis would follow a path to success that many local artists have tried: leaving Ottawa to relocate to a larger city blessed with greater resources and an established music and media industry. Reacting to a perceived (and at times real) lack of opportunity and industry in Ottawa, even stalwart locals The Five Man Electrical Band, The Cooper Brothers, Lynn Miles and Sue Foley at one time based their operations in the United States, where gaining national and international attention seemed more likely.

The 1990s saw Ottawa's country roots overtaken by the blues, as guitarists Tony D, Drew Nelson and Sue Foley played sold-out shows at home and nationwide. In rock and roll, the funk-pop of Furnaceface set the pace, as Celtic rockers Jimmy George became a fixture on the local club scene when not touring nationally. Local DJs kept floors full and took their acts across Canada. And in a basement on Rideau Street, a solo performer named Lucky Ron kept country music alive and well.

Enter the 21st Century and we see dozens of active local artists, ranging from garage bands bringing people out to small clubs, to ambitious world-music performers like Souljazz Orchestra and The Mighty Popo, whose music has been heard around the world. Jazz, reggae, punk and pop enjoy healthy representation. And, perhaps inevitably, a number of rockers have turned to country music. Furnaceface's Tom Stewart, for example, is now honky-tonk crooner Slo' Tom while members of a handful of local punk bands joined forces as the country combo Fiftymen. Country music has also guided the sound of acclaimed locals Lynne Hanson and Trevor Alguire. Respected singer-songwriters Jim Bryson, Lynn Miles and Kathleen Edwards have played to appreciative audiences in dozens of cities on both sides of the Atlantic.



It would be naïve to claim Ottawa-based artists do not still gaze at seemingly greener pastures elsewhere (indeed, two members of Montreal's Arcade Fire began their musical careers in Ottawa). But recent success stories such as The Acorn and Souljazz Orchestra have chosen to keep their home base here while touring other lands. It's a challenge, but it can be done.

While the *X Press*, a newsweekly that inspired greater coverage of the music scene in the 1990s, no longer exists, some local commercial radio stations – notably CBC Ottawa and Live 88.5 – continue to support Ottawa's artists, though less stridently than in the 1960s days of high-charting Ottawa records.

So locals continue to be heard and new talents introduced. In clubs; in coffee houses; in homes. And on recordings, thanks to the Internet and to local record labels like Kelp Records and Pretty Bad Music. Whether the neo-soul of The Split, the gritty blues of MonkeyJunk, or the cabaret-pop of The PepTides, Ottawa's music is being welcomed by new listeners nightly. And daily.

That is also true for rising melodic music-makers like Weird With Cats and Amos the Transparent, whose songs are driven by spirited harmonies and, yes, more than a trace of country music.

These too, and many more, continue to define the Ottawa sound.

Talking with Allan Wigney


Allan Wigney was the editor of *Ottawa X Press*, Ottawa's arts weekly, which closed in 2012. Wigney is currently writing a history of Ottawa music since the 1950s.

What were some of the entrepreneurs and institutions that helped the early musicians of the area get started?

Harvey Glatt was among the first promoters to bring touring folk and country artists to Ottawa and took many a local performer under his wing, as mentor and as manager. In the 1970s, he launched CHEZ-FM and helped to change the local radio market. A handful of DJs played a key role in breaking local bands and singers, chief among them being John Pozer, who helped The Esquires and The Staccatos secure national record deals and later launched the first local label of note: Sir John A Records. I should also mention Hy Bloom, who despite a healthy disdain for rock and roll was, as the only game in town, the man who first recorded nearly every Ottawa-based artist of the 1960s and '70s.

When was X Press founded? What was the role of the alternative weekly in the development of Ottawa's local music scenes?

The city's first successful newsweekly arrived in 1993, and from the beginning shone a spotlight on emerging local musicians, writers, and artists. Its importance during its early years is hard to overstate: a number of bands and performers received their first press from *X Press* and the paper's popularity among locals arguably forced the mainstream dailies and radio stations to recognize the depth of talent here. During its 10-plus years on the scene, *X Press* provided a key outlet for local music to receive its due.



Looking at the history from the 1950s to today, are there any themes in terms of how Ottawa musicians have found success?

I'm not sure there is a particular playbook to follow, but it is a fact that international recognition for Ottawa's artists has nearly always followed a relocation to a larger market. Toronto, New York, Los Angeles, and other media hubs lured the likes of Alanis Morissette from Ottawa in the 1990s just as they had lured Paul Anka, Pat Travers, and The Cooper Brothers in earlier decades. Local musicians continue to leave in search of greener pastures; however, the situation has brightened in recent years, with the likes of Souljazz Orchestra and The Acorn touring internationally while continuing to call Ottawa home. As the industry has changed, some have concluded it can travel to the artist, as much as the artist to it.

Are you seeing changes in the local industries?

Artists can now perform to sell-out crowds, record at a top-line studio, book tours and promotional appearances, and gain distribution for their recordings without leaving the city. That is a relatively recent thing and a boon for Ottawa. Seeing a local artist attain success without having to leave town can only inspire others to do the same, and in the process make a local industry stronger.

APPENDIX C – LOCAL ALBUM RELEASES (2014)

With the help of campus radio station CHUO, which provided its 2014 local album submissions, ottawashowbox.com compiled a list of local album releases for the previous year. The list is reprinted here with the permission of ottawashowbox.com and can be found online at: www.ottawashowbox.com/2014-local-album-releases

ARTIST	ALBUM	LABEL	GENRE
Aaron Ray Band	<i>Aaron Ray Band</i>	Independent	Blues/Folk
Alaskan	<i>Despair, Erosion, Loss</i>	Independent	Post Metal
Alex Silas **	<i>Roots **</i>	Self-Released	Hip Hop
Amos The Transparent *	<i>This Cold Escape *</i>	Factor	Folk
André et Michèle	<i>Summer Jamz EP</i>	Independent	Electronic/ Experimental
André et Michèle	<i>Different Positions</i>	Independent	Electronic/ Experimental
Antoni Gilbert	<i>Que racontent les nuages?</i>	Indépendant	Folk
Apriorism	<i>Smoke</i>	Independent	Electronic
Apriorism	<i>Blood</i>	Independent	Electronic
Average Times	<i>Average Times</i>	Hosehead	Garage
BASTARDS	<i>Peek-A-Boo</i>	Independent	Horrorcore Rap
Better Living Through Chemistry	<i>Better Living Through Chemistry</i>	Independent	Rock
Big Balade *	<i>Big Balade EP *</i>	Indépendant	Funk/Pop
BlakDenim	<i>Vanguard(En)</i>	Independent	Hip Hop/R&B
Bloodnail	<i>Stay Crucial</i>	Independent	Hardcore/Punk
Blue Angel	<i>BLUE ANGEL</i>	Independent	Noise/Garage
Bonnie Doon *	<i>An Affair to Imagine *</i>	Bruised Tongue	Punk
Bosveld *	<i>Catalysts Mixtape *</i>	HAVN	Experimental Folk
Boyhood	<i>bits n' bobs</i>	Independent	Experimental
Bozko	<i>L.E.A.N.</i>	MonDan	Hip Hop
Bryan B	<i>Who Cares</i>	Independent	Hip Hop
Buck N' Nice **	<i>Us Versus Them **</i>	Busy Inc	Hip Hop
Capital Grass and the No Men	<i>Hunkerdownlow</i>	Independent	Bluegrass/Folk
Carraway	<i>Dirty God</i>	Independent	Punk
Cashtro Crosby	<i>Million Fans: Gin & Fur Mixtape</i>	Triple B Records	Hip Hop
Cosmo Doris	<i>Girl Mouth – {B Sides}</i>	Independent	Electro
Craig and Matt's Party Band	<i>Craig and Matt's PARTY BAND</i>	Independent	Rock Instrumental

Criticull	<i>Back In Brown</i>	Independent	Metal
Dead Weights *	<i>Dead Ends & Closed Doors*</i>	Pavones	Punk
D-Track	<i>Interlude</i>	Autoproduit	Hip Hop
Destroy Clocks	<i>Destroy Clocks EP</i>	Independent	Experimental
Disstrick 11	<i>Fuite d'encre</i>	MonDan	Hip Hop
DJ Rocc B	<i>Mindstates EP Pt. 1</i>	Independent	Hip Hop
DJ Rocc B	<i>Mindstates EP Pt. 2</i>	Independent	Hip Hop
Double Experience	<i>721835</i>	Independentt	Rock
Drew Nelson	<i>The Other Side</i>	Independent	Blues Rock
Durs Coeurs	<i>Durs Coeurs</i>	Durs Coeurs	Punk
Dynamic	<i>A Collection of Thoughts</i>	Independent	Hip Hop
Eddie Quotez	<i>EDDIE/UnicornEDDIE</i>	Independent	hip hop/rap
Elementals	<i>EP</i>	Independent	Rock
Elizabeth Riley Band	<i>Felt Through the Bone</i>	Independent	Folk/Roots
Emma's Ringer	<i>Generations</i>	Independent	Alternative/Grunge
Fet. Nat */**	<i>Poule Mange Poule */**</i>	Autoproduit	Experimental
Feral Trash	<i>Trashfiction</i>	Independent	Punk
Finderkeepers	<i>Pack Your Bags</i>	Centretown Records	Punk
Flight Distance */**	<i>High Priests of Low Life */**</i>	Independent	Hip Hop
FLO	<i>Bâtir pour établir</i>	Indépendant	Hip Hop
Flying Fortress	<i>Dirty Rain</i>	Uncle D Records	Hardcore/Punk/ Metal
Fly On The Waltz	<i>Await</i>	Independent	Hip Hop
Focus	<i>La boîte noire</i>	Indépendant	Rock
Fresh Hell */**	<i>We Never Sleep */**</i>	Independent	Punk
Fuck The Facts	<i>Abandoned</i>	Independent	Metal
G.Grand */**	<i>Grand Designs */**</i>	Independent	Hip Hop
G-Netik	<i>Ouvert d'esprit</i>	DFP/Moondan	Hip Hop
Garceau	<i>Le temps des éphémères</i>	Independent	Folk/Rock
Ginger Fox Band	<i>Won't Change</i>	Independent	Rock
Gold+Marrow	<i>Forever</i>	Maple Music	Folk
Grime Kings	<i>Honeymooning</i>	Bruised Tongue	Garage
H. de Heutz *	<i>Study for Violence and Tape</i> *	Black Bough Records 2014	Experimental/Punk
Hamid Drake and Jesse Stewart	<i>Timelines</i>	Art Stew	Modern Jazz
Harea Band	<i>Hip Hop Harea</i>	Independent	Pop/Soul
Herons Wake	<i>Phantom</i>	Independent	Experimental Folk

Heavy Bedroom	<i>I Saw An End</i>	Independent	Experimental
Hunter	<i>EP</i>	Independent	Blues/Rock
I Spell It Nature	<i>NORTH</i>	Independent	Post Rock
Idle Lie	<i>Cube</i>	Indépendant	Ambiant Rock
James Leclaire	<i>Of What is Left</i>	Independent	Folk
Jean et Marguerite	<i>Le condamné</i>	Indépendant	Poetry
Jeepz	<i>Give The Drummer Some</i>	Independent	Hip Hop
Jeepz	<i>The Dilla Tape</i>	Independent	Hip Hop
Jeepz	<i>Winter Turns to Spring</i>	Independent	Hip Hop
Jeepz	<i>Loonie And A Dream</i>	Independent	Hip Hop
Jeepz	<i>No Greater Love</i>	Independent	Hip Hop
Jeepz	<i>Sail Out</i>	Independent	Hip Hop
Jeepz	<i>Moons. Comets. Flickering Stars.</i>	Independent	Hip Hop
Jeepz	<i>Reality is Overrated</i>	Independent	Hip Hop
Jeepz	<i>The Nas Remixes</i>	Independent	Hip Hop
Jeepz *	<i>Open Sunday *</i>	Independent	Hip Hop
Jeepz	<i>Nomadic Muses: When Summer Turns to Fall</i>	Independent	Hip Hop
Jeepz	<i>Looped & Unplugged</i>	Independent	Hip Hop
Jeepz	<i>Duende</i>	Independent	Hip Hop
Jeepz	<i>/ I'L(L)-G o-R h y t h m /</i>	Independent	Hip Hop
Jeepz	<i>#TBT2011</i>	Independent	Hip Hop
Jeepz	<i>Colour Outside the Lines</i>	Independent	Hip Hop
Jeepz	<i>Occam's Sword</i>	Independent	Hip Hop
Jeepz	<i>Santa's Got A Brand New Bag</i>	Independent	Hip Hop
Jester	<i>Let Go</i>	Independent	Electronic Dance
Jill Zmud	<i>small matters of life and death</i>	Independent	Country
Joanie Michaud	<i>Joanie Michaud (EP)</i>	Indépendant	Franco Pop
Joe Brownrigg	<i>Instigator</i>	Independent	Folk
Jonathan Becker & The North Fields	<i>The North Fields</i>	Independent	Folk/Rock
Jon Hynes *	<i>Watchful Creatures *</i>	Shuffling Feet Records	Folk
Jon Creeden	<i>Capital City</i>	Independent	Punk
Josef Mieto	<i>The Down Low Side B Ep</i>	Independent	Folk
Just Poets	<i>Painting Pictures in the Darkness</i>	Independent	Hip Hop

JW Jones	<i>Belmont Boulevard</i>	Blind Pig Records	Blues
Kaleigh Watts	<i>Smoke Lake</i>	Independent	Folk
Kalle Mattson */**	<i>Someday, The Moon Will Be Gold */**</i>	Parliament of Trees	Folk
King x Yu\$\$o	<i>Crookid Bass</i>	Independent	Hip Hop
KingsCollege	<i>PeaceToTheYouth</i>	Independent	Hip Hop
Kings Quest	<i>Fox Island</i>	Independent	Garage/Shoegaze
Kode	<i>Le Brave du Coin</i>	DFP/Moondan	Hip Hop
Kuldrin	<i>The Sorcerer</i>	Independent	Metal
Ladyboy	<i>Demos</i>	Independent	Ambient/Rock
Laurent Bourque	<i>Pieces of Your Past</i>	Independent	Pop/Folk
Lees Avenue	<i>Out of Luck EP</i>	Independent	Pop Punk
Left Lane	<i>Stay In Your Lane</i>	Independent	Hip Hop
Les chiens sales	<i>Mauvais Garçon</i>	Camp de Base	Country
Lunatic Rappers	<i>Rap Asylum</i>	Independent	Rap
Lynne Hanson **	<i>River of Sand **</i>	Independent	Folk
Midnight Airship	<i>A River Once Flowed</i>	Independent	Prog Rock
Mnemonics	<i>Too Late To Get Loud</i>	Independent	Punk
Mother's Children *	<i>Lemon *</i>	Taken by Surprise	Punk/Power Pop
Moonfruits	<i>Début</i>	Independent	Folk
Muelkik	<i>Muelkik</i>	Independent	Punk/Rock
Musk Ox *	<i>Woodfall *</i>	Independent	Experimental/ Instrumental
NDMA	<i>Panache</i>	Independent	Hip Hop
New Swears */**	<i>Junkfood Forever, Bedtime Whatever */**</i>	Bachelor Records	Garage/Punk
Nightshades	<i>The Beauty of Dreaming EP</i>	Independent	Garage
Niko Doughski	<i>Kings Amongst Pawns</i>	Makin' That Doughski Music Group	Rap
Old Rules	<i>Blurred</i>	Independent	Indie Punk Rock
Organ Eyes	<i>Visual Meetings</i>	Bruised Tongue	Garage/Psych
Organ Eyes	<i>Daze Pace</i>	Independent	Garage/Psych
Paddy Kelly	<i>The Irish In Me</i>	Independent	Irish Traditional
Patterson Hall	<i>The Eaves EP</i>	Independent	Ambient/Shoegaze
Patrick Shanks	<i>Down To A Dull Roar</i>	Independent	Folk/Rock
Peas and Carrots	<i>Birdhouse</i>	Independent	Folk
Pith and the Parenchymas */**	<i>Song of the Neverending Ugly Lizard */**</i>	Independent	Experimental

Pocket Writer	<i>Dented Little Scars</i>	Independent	Indie Folk
Pregnancy Scores	<i>Mind Control EP</i>	Deranged	Punk/Hardcore
Prehistoric	<i>Walking Backwards on an Escalator</i>	Independent	Hip Hop
Project Mayhem	<i>Soap</i>	Independent	Metal
Rob Frayne	<i>Home Jazz</i>	Bowl of Notes	Jazz
Roberta Bondar *	<i>Caustic *</i>	Bruised Tongue	Garage
Rydell	<i>I Was Hoping This Could Save Me</i>	Independent	Emo/Punk
Saturnfly	<i>Cyborg's Lament</i>	Independent	Art Rock
Schizophrenia	<i>5000 lp</i>	Deathtangle Absolution/ Independent	Noise Punk
Silkken Laumann */**	<i>Not Forever Enough */**</i>	Independent	Electronic/Rock
Sills & Smith	<i>Etched</i>	Independent	Rock
SORU	<i>City Lights</i>	Independent	R&B/Hip Hop
Souljazz Orchestra	<i>Inner Fire</i>	Strut Records	Jazz/International
Sound of Lions **	<i>Take Me With You **</i>	Independent	Hip Hop/Rock
Sounds of Sputnik	<i>New Born</i>	Ear to Ear Records	Dream Pop
Steamers *	<i>Steammates EP *</i>	Independent	Folk
Steve Adamyk Band *	<i>Dial Tone *</i>	Dirt Nap	Garage/Punk
Stone Age Man **	<i>Touch the Sun **</i>	Independent	Pop
Sum	<i>Incarcerated</i>	Independent	Metal
Tall Trees	<i>How To Take A Fall</i>	Independent	Rock
Tariq Anwar	<i>Split Perspectives</i>	Independent	Blues/Folk
TBWNIS (The Band Whose Name Is A Symbol) **	<i>Pathfinder **</i>	Independent	Psych Rock
The Cardboard Crowns	<i>GLOBAL CITIZEN</i>	Independent	Ska/Punk
The Creeps */**	<i>Eulogies */**</i>	It's Alive	Pop Punk
The Gallop	<i>Tall Tale Tellers</i>	Independent	Rock
The Gowls	<i>The Gowls</i>	Independent	Rock
The Haig	<i>Tales of Wisdom and Might</i>	Independent	Rock
The Jimmy Tri-Tone Band	<i>Wanted</i>	Independent	Folk/Rock
The Musettes	<i>Wanderlust</i>	Independent	Folk/Pop
The Noisy Locomotive	<i>The Noisy Locomotive, Vol. 1 & 2</i>	Independent	Folk
The Ohm	<i>Essence</i>	SoCan	Rock

The Peptides	<i>Love Question Mark</i>	Independent	Pop
The Powergoats	<i>Ruby Headlights</i>	Independent	Blues/Rock
The Sir John A MacDonalds	<i>Don't Wanna Go To The Show</i>	Independent	Rock
The Souljazz Orchestra	<i>Inner Fire</i>	Strut Records	World/Soul
The Split **	<i>Can't Get Enough **</i>	Label Records	Funk/Soul
The Stringers	<i>See You At 7</i>	Independent	Rock
The Superlative	<i>Numero Deux</i>	Independent	Pop Punk
The Tenenbaums	<i>Fish</i>	Independent	Folk/Punk
The Ticket	<i>Retro Pop EP</i>	Independent	Pop/Blues
The Visit	<i>Offering</i>	Independent	Classical/ Experimental
The Yips *	<i>Air Loom *</i>	Bruised Tongue	Garage Rock
Tindervox *	<i>Tindervox *</i>	Independent	Rock
Those Gulls **	<i>Forevermore **</i>	Independent	Rock/Post-Punk
Timotheos	<i>Sea Peoples</i>	Independent	Progressive Folk
Trevor Alguire **	<i>Miles Away **</i>	Independent	Folk
Tropical Dripps *	<i>Cool Dude *</i>	Bruised Tongue	Garage Rock
Venessa Lachance	<i>Composition originales – piano</i>	APCM	Instrumental
Violence	<i>Violence Erlebnis</i>	Independent	Electronic
Winchester Warm	<i>Belle Attente</i>	Independent	Folk
Wychdokter	<i>Totem</i>	Independent	Electronic
Yann Meunier	<i>A+</i>	Tunzsoundz/ DFP	Hip Hop
Yo Mama Band	<i>Four For the Road</i>	Independent	Alt-pop
Yo Mama Band	<i>Kiss You Because I Can</i>	Independent	Alt-pop
ZEX	<i>Savage City</i>	Independent	Punk
ZEX	<i>The Ragnarok Session</i>	Independent	Punk
ZEX	<i>wanderlust</i>	Independent	Punk
ZEX	<i>Fight For Yourself</i>	Capitalicide/ Uncle D Records	Punk

* – Denotes an album that was an Ottawa Showbox's Favourite Local Releases

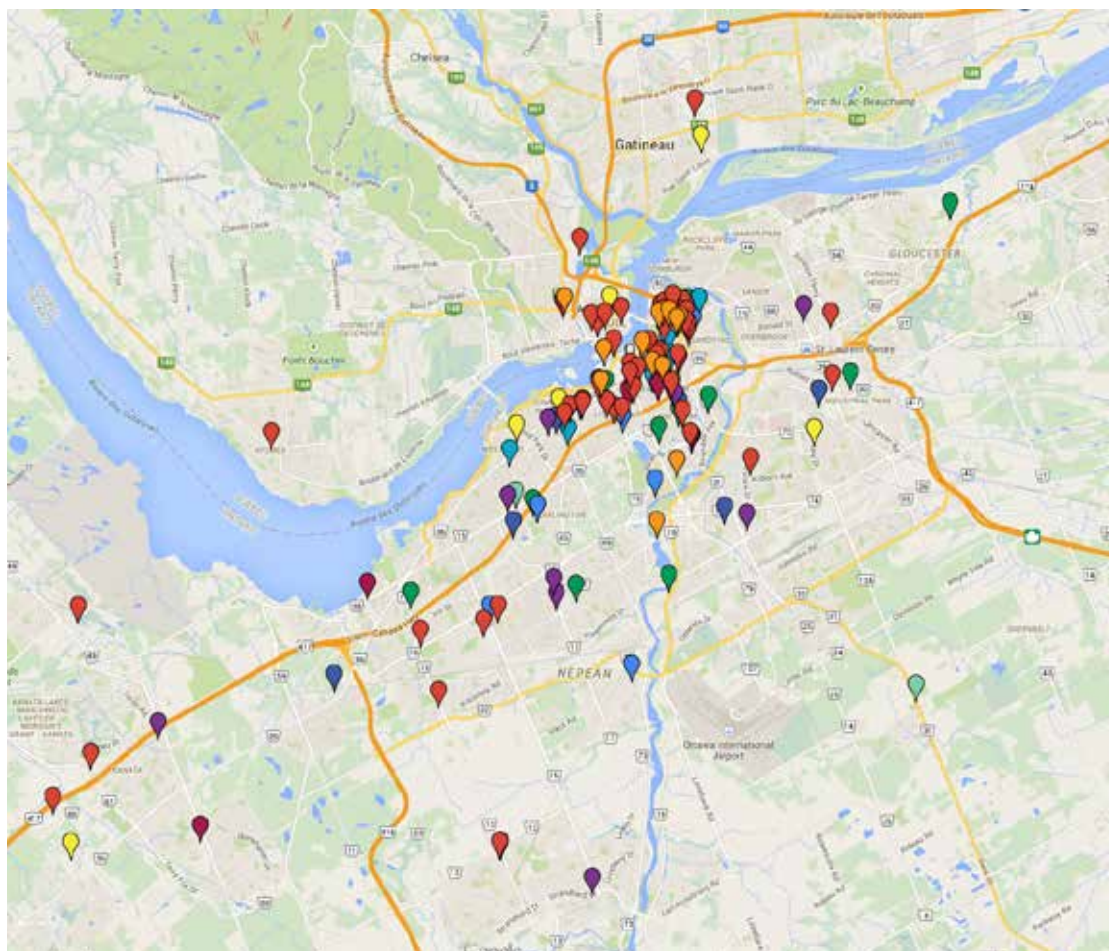
** – Denotes an album that contains a song that was on Ottawa Citizen's 2014 Ottawa Music Playlist

APPENDIX D – LOCAL MUSIC DIRECTORY

The following is the beginning of a local music directory organized by industry sub-sector. The listings were compiled from a combination of online survey responses and online research. A contact email is provided for businesses without a website listed. Our hope is that this directory will eventually move online and be maintained by a local industry association.

Note: Not all businesses provided a street address, or have a street address listed on their website.

The following Google map shows the locations of music businesses by type across the city.



Legend

- | | | |
|---------------------|-----------------------|--------------------------------------|
| ● Music Companies | ● Music Organizations | ● Live Venues |
| ● Recording Studios | ● Music Education | ● Music Festivals |
| ● Rehearsal Spaces | ● Music Retail | ● Music Instrument Retail and Repair |

MUSIC COMPANIES

Artist Services

Groupe Grio

7-42, Nilphas-Richer
Gatineau QC J8T 7T1
groupegrio@gmail.com

Hill Artist Management

Wakefield, QC
www.hillartistmanagementandbookings.webs.com

Intello-productions Inc

Ottawa, ON
infos@yaomusique.com

Kelp Music

207 Bank Street, Suite 404
Ottawa, ON K2P 2N2
www.kelprecords.com

Partick Artists

1960 Scott St, Suite 302
Ottawa, ON K1Z 8L8
www.partickartists.com

Patrick Harrison

295 Besserer, #6
Ottawa, ON
patrickrharrison@gmail.com

RedLeaf Music

184 Laval St. #7
Ottawa, ON
www.redleafmusic.ca

You Rock Red

Ottawa, ON
www.yourockred.com

Concert Promoters

Blackwidow Promotions

657 Rosehill Avenue
Stittsville, ON K2S 1B9
www.blackwidowpromotions.com

Spectrasonic

PO Box 57043
RPO Glasdstone
Ottawa, ON K1R 1A1
www.spectrasonic.com

Record Labels

Black Bough Records

1620 Scott Street, P.O. Box
64221, Holland Cross R.P.O.,
Ottawa, ON K1Y 4V2
www.blackbough.ca

Bruised Tongue

212 Cambridge St.
Ottawa, ON K1R 7A9
www.bruisedtongue.com

E-Tron Records

Hull, QC
www.etronevents.com

Label Records

Ottawa, ON
www.labelrecords.ca

LaFab Musique

Orléans, ON
www.lafabmusique.ca

Pop Drone

213 Cambridge N
Ottawa, ON K1R 6J3
www.popdrone.ca

Pretty Bad Records

732 Weston Dr
Ottawa, ON K1G 1W2
www.prettybadrecords.com

RECORDING STUDIOS

Recording Studios

Audio Valley

1570 Liverpool Court, Unit 1
Ottawa, ON K1B 4L1
www.audiovalley.ca

Blue Bear Sound

Ottawa, ON
www.bluebearsound.com

Bova Lab Studio

Ottawa, ON
www.philipshawbova.com/bova-lab-studio

Bova Sound

Ottawa, ON
www.bovasound.com

Kevin Cooke Audio

Orléans, ON
kevcooke@sympatico.ca

Little Bull Horn Studios

137 Spruce St
Ottawa, ON K1R 6P1
www.littlebullhorn.com

nCode Recording Studio

1010 Polytek St
Ottawa, ON K1J 9H8
ncode.charles.f@gmail.com

Pebble Studios

900 Greenbank Rd.
Lower Level
Nepean, ON K2J 1S8
www.hummingbirdmusic.ca

Raven Street Studios

1540 Raven Ave,
Ottawa, ON K1Z 7Y9
www.ravenstreet.com

The Gallery Studios

2 Monk St
Ottawa, ON K1S 3Y6
www.galleryrecording.com

Soundmaster Studios

9 Antares Drive
Ottawa, ON K2E 7V5
www.soundmasterstudios.com

Yogi's Meatlocker

Ottawa, ON
www.yogismeatlocker.com

Mobile Studios

Click Track Audio

Ottawa, ON
www.clicktrackaudio.ca

Audio Post Production

Atomic Audio

2740B Queensview Dr.,
Ottawa, ON K2B 2A2
www.atomicaudio.tv

BartMart

66 Muriel Street
Ottawa, ON K1S 4E1
www.bartmart.com

GAPC

1550 Laperriere Avenue,
Suite 102
Ottawa, ON K1Z 7T2
www.gapcentertainment.com

REHEARSAL SPACES

Capital Rehearsal Studios

250 City Centre #202
Ottawa, ON K1R 6K7
www.capitalrehearsal.wordpress.com

Sound Check Studios

1690 Carling Avenue
Ottawa, ON K2A 1C6
www.soundcheckstudios.ca

The Bunker

4603 Bank Street
Gloucester, ON K1T 3W6
www.bunkerrehearsal.com

MUSIC ORGANIZATIONS

Association des Professionnels de la Chanson et de la Musique

450 rue Rideau, bureau 401
Ottawa, ON K1N 5Z4
www.apcm.ca

Canada Council for the Arts

150 Elgin St, P.O. Box 1047
Ottawa, ON K1P 5V8
www.canadacouncil.ca

Canadian Arts Presenting Association

17 York Street, suite 200
Ottawa, ON K1N 9J6
www.capacoa.ca

Folk Music Ontario

508-B Gladstone Avenue
Ottawa, ON K1R 5P1
www.folkmusicontario.ca

IATSE Local 471

Ottawa, ON
www.iatse471.com

Local 180 Musicians Association of Ottawa-Gatineau

280 Metcalfe Street,
Suite 301
Ottawa, ON K2P 1R7
www.musiciansassociation180.org

Multicultural Arts, Schools, Communities

250 Holland Avenue
Ottawa, ON K1Y 0Y5
www.masconline.ca

Ottawa Festivals d'Ottawa

450 Churchill Avenue N
Ottawa, ON K1Z 5E2
www.ottawafestivals.ca

Ottawa New Music Creators

319 Catherine St
Ottawa, ON K1R 5T4
www.onmc.info

Réseau Ontario

450 Rideau Street
Ottawa, ON K1N 5Z4
www.reseauontario.ca/fr/

The Improvising Musicians of Ottawa/Outaouais

Ottawa, ON
www.improvisedmoo.com

World Folk Music Ottawa

Ottawa, ON
www.worldfolkmusicottawa.com

MUSIC EDUCATION

Post Secondary
Music Programs

Algonquin College

Music Industry Arts Program
1385 Woodroffe Avenue
Ottawa, ON K2G 1V8
www.algonquincollege.com

Carleton University

Bachelor of Music
1125 Colonel By Dr
Ottawa, ON K1S 5B6
www.carleton.ca/music

University of Ottawa

School of Music
75 Laurier Ave E
Ottawa, ON K1N 6N5
www.arts.uottawa.ca/music

The Audio Recording Academy

College Accredited Program
1540 Raven Ave,
Ottawa, ON K1Z 7Y9
www.tara.ca

*Lessons and other
education options.
Many music instrument
stores also offer lessons.*

Alcorn Music Studios

953 Gladstone Avenue
Ottawa, ON K1Y 3E5
www.alcornmusicstudios.com

Fat Dog Productions

15 Capella Court Unit 101
Ottawa, ON K2E 7X1
www.fatdogproductions.ca

Hummingbird Music

(Nepean School of Music,
JamClinic)
900 Greenbank Rd.,
Lower Level
Ottawa, ON K2J 1S8
www.hummingbirdmusic.ca

Ottawa Folklore Centre Music School

1111 Bank Street
Ottawa, ON K1S 3X4
[www.ottawafolklore.com/
learn-to-play](http://www.ottawafolklore.com/learn-to-play)

Shine Academy

119 Pamilla Street
Ottawa, ON K1S 3K
www.theshinegroup.com

MUSIC RETAIL

Birdman Sound

593 Bank St,
Ottawa, ON K1S 3T4
[www.birdmansound.
blogspot.ca](http://www.birdmansound.blogspot.ca)

Compact Music (Centretown)

206, Bank Street
Ottawa, ON K2P 1W8
www.compactmusic.ca

Compact Music (Glebe)

785 1/2 Bank Street
Ottawa, ON K1S 3V5
www.compactmusic.ca

Gabba Hey

250 City Centre #202
Ottawa, ON K1R 6K7
[https://www.facebook.com/
gabbaheyshop](https://www.facebook.com/gabbaheyshop)

Legend Records

1315 Wellington St W.
Ottawa, ON K1Y 3A8
legendrecords@bellnet.com

The Record Centre

1099 Wellington St W
Ottawa, ON K1Y 2Y4
www.therecordcentre.com

The Turning Point

411 Cooper St
Ottawa, ON K2P 1X4
www.turningpointmusic.ca

Vertigo Records

193 Rideau St.
Ottawa, ON K1N 5X8
www.vertigorecords.ca

LIVE VENUES

Algonquin College Commons Theatre

1385 Woodroffe Ave
Ottawa, ON K2G 1V8
[www.algonquinsa.com/
theatre.aspx](http://www.algonquinsa.com/theatre.aspx)

Arts Court Theatre

2 Daly Avenue, suite 240
Ottawa, ON K1N 6E2
www.artscourt.ca

Atomic Rooster

303 Bank
Ottawa, ON K2P 1X7
www.atomicrooster.ca

Avant-Garde Bar

135 Besserer St
Ottawa, ON K1N 6A7
www.avantgardebar.com

Babylon

317 Bank St
Ottawa, ON K2P 1X7
www.babylonclub.ca

Barney Danson Theatre

1 Vimy Place
Ottawa, ON K1A 0M8
www.warmuseum.ca

Barrymores

323 Bank St
Ottawa, ON K2P 1X9
www.barrymores.on.ca

Bassline Station

2557 Baseline Rd
Ottawa, ON K2H 7B3
www.basslinerocks.ca

Blacksheep Inn

53 Chemin Riverside Drive
Wakefield, QC J0X 3G0
www.theblacksheepinn.com

Brass Monkey

250 Greenbank Rd
Ottawa, ON K2H 8X4
[www.brassmonkeybilliards.
com/home](http://www.brassmonkeybilliards.com/home)

Bread By Us

1065 Wellington St. West
Ottawa, Ontario
www.breadbyus.com

Bronson Centre

211 Bronson Ave
Ottawa, ON K1R 6H4
www.bronsoncentre.ca

Cabaret La Basoche

120 Rue Principale
Gatineau, QC J9H 3M3

Café ALT

Université Private
Ottawa, ON K1N 9A7
www.sfu.ca/cafealt

Café Dekcuf

221 Rideau St
Ottawa, ON K1N
[www.facebook.com/pages/
Cafe-Dekcuf/63429626989](https://www.facebook.com/pages/Cafe-Dekcuf/63429626989)

Café Nostalgica

603 Cumberland St
Ottawa, ON K1N 7K4
www.cafenostalgica.ca

Canadian Tire Centre

1000 Palladium Dr
Ottawa, ON K2V 1A5
www.canadiantirecentre.com

Carleton Tavern

223 Armstrong Street
Ottawa, Ontario K1Y 2W5
[https://www.facebook.com/
CarletonTavern/info](https://www.facebook.com/CarletonTavern/info)

Centrepointe Theatre

101 Centrepointe Drive
Ottawa, ON K2G 5K7
[www.centrepointetheatre.
com/en/index.htm](http://www.centrepointetheatre.com/en/index.htm)

Chateau LaFayette

42 York St
Ottawa, ON K1N 5S6
www.thelaff.ca

City Nightclub

222 Slater Street
Ottawa, ON K1P 5N5
[https://www.facebook.com/
CityNigtClub](https://www.facebook.com/CityNigtClub)

Clocktower Pub

575 Bank Street
Ottawa, ON K1S 5L7
www.clocktower.ca

Club SAW

67 Nicholas St
Ottawa ON K1N 7B9
[www.galleriesawgallery.com/
sawgallery.html](http://www.galleriesawgallery.com/sawgallery.html)

Crazy Horse

115 Roland Michener Dr
Ottawa, ON K2T 1G7
www.thecrazyhorse.ca

Daily Grind

601 Somerset St W
Ottawa, ON K1R 5K1
www.thedailygrindartcafe.com

Dominion Tavern

33 York St
Ottawa, ON K1N 5S7
www.tavern.ca

Dominion-Chalmers United Church

355 Cooper Street
Ottawa ON K2P 0G8
www.dc-church.org

Elmdale Tavern

1084 Wellington St W
Ottawa, ON K1Y 2Y5
www.elmdaletavern.com

Fall Down Gallery

288 Bank St
Ottawa, ON K2P
www.falldowngallery.tumblr.com

Fatboys Smokehouse

34 Murray St
Ottawa, ON K1N 9M5
www.fatboys.ca

Gabba Hey

250 City Center Ave
Unit #202
Ottawa, ON K1R 1C7
www.capitalrehearsal.wordpress.com

Gallery 101

51 Young Street Suite B
Ottawa, ON K1S 3H6
www.g101.ca/main

Gigspace

953 Gladstone Avenue
Ottawa, ON K1Y 3E5
Canada
www.gigspaceottawa.com

Grace O'Malleys

1151 Ogilvie Rd
Ottawa, ON K1J 7P6
www.gracies.ca/ottawa

Great Canadian Theatre Company

1233 Wellington St. W.
Ottawa, ON K1Y 0G7
www.gctc.ca

Greenfield's Pub

900 Greenbank Road
Ottawa, ON K2J 1S8
www.barrhavenspub.com

Heart & Crown (Clarence)

67 Clarence St
Ottawa, ON K1N 5P5
www.heartandcrown.ca

Heart & Crown (Clarence)

67 Clarence St
Ottawa, ON K1N 5P5
www.heartandcrown.ca

Heart & Crown (Preston)

353 B Preston St
Ottawa, ON K1S 1V6
www.heartandcrown.ca

Honest Lawyer

141 George St.
Ottawa, ON K1N 5W5
www.honestlawyer.com

House of TARG

1077 Bank St
Ottawa, ON K1S 3W9
www.houseoftarg.com

Irene's Pub

885 Bank St
Ottawa, ON K1S 3W4
www.irenespub.ca

Island Flava

409 Dalhousie St
Ottawa, ON K1N 9K4
www.islandflava.ca

Kaffe 1870

715 Riverside Drive
Wakefield, QC J0X 3G0
www.kaffe1870.com

La Nouvelle Scene

333 King Edward Avenue
Ottawa, ON K1N 7M5

Le Petit Chicago

50 Promenade Du Portage
Gatineau, QC J8X 2J7
www.petitchicago.ca

Le Temporaire

75 St-Redempteur
Gatineau (Hull), QC
J8X 2H4
www.letroquet.ca

Lunenburg Pub & Bar

14 Waller St
Ottawa, ON K1N 9C4
www.theburg.ca

Mansion Nightclub

400A Dalhousie,
Ottawa, ON K1N 9K4
www.mansionnightclub.ca

Manx Pub

370 Elgin St
Ottawa, ON K2P 1M9
www.manxpub.com

Mavericks

221 Rideau St
Ottawa, ON K1N
www.mavericksbar.com

Maxwells

340 Elgin Street
Ottawa, ON K2P 1M6
www.maxwellsottawa.com

Mercury Lounge

56 Byward Market Square
Ottawa, ON K1N 7A2
www.mercurylounge.com

Mill Street Brew Pub

555 Wellington St.
Ottawa, ON K1R 1C5
<http://ottawa.millstreet-brewpub.ca/>

Mother Mcgintys

67 Clarence St
Ottawa, ON K1N 5P5

Mugshots

75 Nicholas Street
Ottawa, ON K1N 7B9
[www.hihostels.ca/
Ontario/1448/ontario/
hi-ottawa-jail/mugshots-bar/](http://www.hihostels.ca/Ontario/1448/ontario/hi-ottawa-jail/mugshots-bar/)

National Arts Centre

53 Elgin St
Ottawa, ON K1P 5W1
www.nac-cna.ca

Neat Café

1715 Calabogie Rd
Burnstown K0J 1G0
www.neatfood.com

Options Jazz Lounge

525 Legget Drive
Ottawa, ON K2K 2W2
[www.brookstreethotel.com/
play/live-jazz/](http://www.brookstreethotel.com/play/live-jazz/)

Ottawa Art Gallery

2 Daly Avenue
Ottawa, ON K1N 6E2
www.ottawaartgallery.ca

Patty Boland's

101 Clarence St
Ottawa, ON K1N 5P5
www.pattybolands.com

Pressed

750 Gladstone Ave
Ottawa, ON K1R 6X5
www.pressed-ottawa.com

Pub 101

101 York St
Lanark, ON K0G 1K0
www.pub101.com

Quinn's

1070 Bank St
Ottawa, ON K1S 3X3

Rainbow Bistro

76 Murray St
Ottawa, ON K1N
www.therainbow.ca

Raw Sugar

692 Somerset St W
Ottawa, ON K1R 6P4
www.rawsugarcafe.com

Ritual Nightclub

137 Besserer St
Ottawa, ON K1N 9M7

Salle Jean-Després

25, rue Laurier
(secteur de Hull)
Gatineau, QC J8X 4C8
[www.ovation.
qc.ca/salle-jean-desprez.
asp?Lang=EN](http://www.ovation.qc.ca/salle-jean-desprez.asp?Lang=EN)

Salle Odysée

855 Boulevard Gappe
Gatineau, QC J8T 8H9
[www.maisondelaculture.ca/
Salle-Odysee/index.html](http://www.maisondelaculture.ca/Salle-Odysee/index.html)

Shenkman Arts Centre

245 Centrum Boulevard
Ottawa, ON K1E 0A1
www.shenkmanarts.ca

**Spirit of Rasputin
Arts Society**

2177 Braeside Avenue
Ottawa, ON K1H8M6
www.rasputins.ca

St Albans

56 Byward Market Square
Ottawa, ON K1N 7A2
www.stalbanschurch.ca

**St Brigids Centre
for the Arts**

310 St Patrick St
Ottawa, ON K1N 5K5
www.saintbrigidscentre.com

Tabaret Hall

550 Cumberland
University of Ottawa
Ottawa, ON K1N 6N8
[www.uottawa.ca/maps/
building/tabaret.html](http://www.uottawa.ca/maps/building/tabaret.html)

The Branch

15 Clothier St. East,
Kemptville ON K0G 1J0
www.thebranchrestaurant.ca

Zaphods

27 York St
Ottawa, ON K1N 5S7
www.zaphods.ca

MUSIC FESTIVALS

Arboretum

60 Waller St
Ottawa, ON K1N
www.arboretumfestival.com

Beau's Oktoberfest

Vankleek Hill
www.beausoktoberfest.ca

**Calabogie Blues
and Ribfest**

30 Barrett Chute Rd
Calabogie, ON K0J 1H0
www.calabogieblues.com

**Festival de
L'Outaouais Emergent**

211 Rue Montcalm
Gatineau, Québec J8Y 3B5
www.festfoe.ca

**Festival franco-ontarien
Banque Nationale**

Mackenzie Ave
Ottawa, ON K1N 9J6
www.ffo.ca

House of PainT

Ottawa, ON
www.houseofpaint.ca

IMOOfest

Club Saw (67 Nicholas St)
Ottawa, ON
www.improviseedmoo.com

Merrickville Jazzfest

Merrickville, ON
www.merrickvillesjazzfest.com

Music and Beyond

51 William St
Ottawa, ON K1N 1A3
www.musicandbeyond.ca

O-Town Hoedown

Ottawa, ON
www.otownhoedown.com

**Ottawa Explosion
Weekend**

2 Daly Ave
Ottawa, ON K1N 6E2
www.ottawaexplosion.blogspot.ca

Ottawa Bluesfest

1 Vimy Pl
Ottawa, ON K1A 0M8
www.ottawabluesfest.ca

Ottawa Folk Festival

Hog's Back Rd
Ottawa, ON K1A 0M2
www.ottawafolk.com

**Ottawa
Grassroots Festival**

330 Kent St
Ottawa, ON K2P 2A6
www.ottawagrassrootsfestival.com

**Ottawa Implosion
Weekend**

250 City Centre #202
Ottawa, ON K1R 6K7
www.bruisedtongue.com/wordpress/ottawa-implosion-weekend

**Ottawa International
Chamber Music Festival**

4 Florence Street, Suite 201
Ottawa ON K2P 0W7
www.chamberfest.com

Ottawa Jazz Festival

294 Albert Street, suite 602
Ottawa, ON K1P 6E6
www.ottawajazzfestival.com

Westfest

39 Vaughan St., Suite 103,
Ottawa, ON K1M 1W9
www.westfest.ca

Unisong Choir Festival

Ottawa, ON
www.unisong.ca

MUSIC INSTRUMENT RETAIL AND REPAIR

Dave's Drum Shop

390 Gladstone Ave
Ottawa, ON K2P 0Z1
www.davesdrumshop.com

Do Re Mi Pianos

1765 Carling Ave
Ottawa, ON K2A 1C9
www.doremipianos.com

Glebe Guitar Repair

191 Holmwood Ave.
Ottawa, ON K1S 2P3
www.glebeguitar.ca

Granata Music

1568 Merivale Road
Ottawa, ON K2G 5Y7
www.gratamusic.ca

Intercontinental Music

610 Donald St
Ottawa, ON K1K 1L4
www.intercontinentalmusic.ca

International Musicland

3161 Strandherd Drive
Nepean, K2J 5N1
www.intlmusicland.com

Lauzon Music

1345 Wellington Street
Ottawa, ON K1Y 3B8
www.lauzonmusic.com

Leading Note

370 Elgin St #2
Ottawa, ON K2P 1N1
www.leadingnote.com

**Long and McQuade
(Ottawa)**

66 Hearst Way
Ottawa, ON
www.long-mcquade.com

Metro Music

695 Bank St.
Ottawa, ON K1S 3T8
www.metromusicottawa.ca

Ottawa Folklore Centre

1111 Bank St
Ottawa, ON K1S 3X4
www.ottawafolklore.com

Spaceman Music

388 Gladstone Av,
Ottawa, ON K2P 0Z1
www.spacemanmusic.com

St. John's Music

1541 Merivale Road
Ottawa, ON K2G 5W1
www.stjohnsmusic.com

Steve's Music Store

308 Rideau Street
Ottawa, ON K1N 5Y5
www.stevesmusic.com

Tone on Wheels

Ottawa, Ontario
www.toneonwheels.com

MUSIC INSTRUMENT DESIGN AND MANUFACTURING

Empress Effects

Unit 2 - 95 Denzil Doyle Crt
Kanata ON K2M 2G8
www.empresseffects.com

Fairfield Circuitry

23 Rue Lois
Gatineau, QC J8Y 3R3
www.fairfieldcircuitry.com

Fine Strings

2116 Fillmore Crescent
Gloucester, ON
www.finestrings.ca

Glebe Guitar Repair

www.glebeguitar.ca

Guy Harrison Violins

792 Gladstone Avenue
Ottawa, ON K1R 6X9
www.guyharrison.com

John MacDonald/John MacDonald Guitars

449 Blake Blvd
Ottawa, ON
www.johnmacdonaldguitars.com

Manzer Guitars

Almonte, ON
www.manzer.com

Monde Synthesizer

Ottawa, ON
www.mondesynthesizer.com

Retro-Sonic Pedals

Ottawa, ON
www.retro-sonic.com

Sage Electronics

Ottawa, ON
www.sageelectronics.com

Sankey Guitars

Ottawa, ON
www.sankeyguitars.com

ST Guitarworks

Gloucester, ON
www.stguitarworks.com

Tetra Speakers

875 Duberry Street
Ottawa, ON K2B 7K4
www.tetraspeakers.com

The Sound Post

319 Catherine St
Ottawa, ON K1R 5T4
www.thesoundpost.com

Weston Instruments

13 Cedarock Drive,
Kanata, ON
www.ottawaguitarrepair.com

LIVE MUSIC SUPPORT

Consensus Cross-Cultural Communication & Multimedia

Ottawa, ON
titomedinamusic@yahoo.ca

Fleet Pro Sound

Unit #104 6 Bexley Place
Ottawa, ON K2H 8W2
www.fleetsound.com

Kamp Operations

Ottawa, ON
www.kamp-ops.com

Postering Ottawa

Ottawa, ON
www.posteringottawa.ca

Professional Sound & Lighting

1296 Leeds Ave.
Ottawa, ON K1B 3W3
www.psl.on.ca

Ottawa Special Events

2491 Kaladar Avenue
Ottawa, ON K1V 8B9
www.ottawaspecialevents.com

Toersa Security

20 Cleopatra Drive,
Ottawa, ON K2G 0B3
www.toersa.com

Wall Sound & Lighting

1762 Woodward Drive
Ottawa, ON K2C 0P8
www.wallsound-lighting.com

ENDNOTES

- ¹ Taken from the Our Organization page on the Bluesfest website, <http://ottawabluesfest.ca/our-organization/>, last accessed February 18, 2015.
- ² For an example, see Brian Hracs, *Building Ontario's Music Economies* (Martin Prosperity Institute, February 2009).
- ³ Peter Simpson, *Big Beat: The Ottawa music playlist for 2014* (The Big Beat, Ottawa Citizen, December 29, 2014), <http://ottawacitizen.com/entertainment/local-arts/big-beat-the-ottawa-music-playlist-for-2014>.
- ⁴ Personal interview, Tim Potocic.
- ⁵ For an example, see the *Hamilton Music Strategy* as submitted by the Tourism and Culture Division of the Planning and Economic Development Department, available at <http://www.hamilton.ca/NR/rdonlyres/128F0E90-7212-4A0B-8C4A-8380A8016988/0/Jan1571PED14001.pdf>.
- ⁶ For an example, see Richard Florida, *The Rise of the Creative Class: And How It's Transforming Work, Leisure, Community and Everyday Life* (Basic Books, 2003), and Elizabeth Currid, *The Warhol Economy: How Fashion, Art, and Music Drive New York City* (Princeton, NJ: Princeton University Press, 2008).
- ⁷ Originally sourced from *Creative Services: film, television and interactive digital media* (Invest Ottawa, March 27, 2013). For the latest guide, *Ottawa Spotlight: Film, Television & Interactive Digital Media* (Invest Ottawa), see <http://guides.investottawa.ca/guide/film-television-and-interactive-digital-media>.
- ⁸ Taken from the Ontario Music Fund page on the OMDC website, http://www.omdc.on.ca/music/the_ontario_music_fund.htm, last accessed February 18, 2015.
- ⁹ *Focus on Geography Series, 2011 Census* (Statistics Canada), <http://www12.statcan.gc.ca/census-recensement/2011/as-sa/fogs-spg/Facts-csd-eng.cfm?Lang=eng&GK=CS-D&GC=3506008>, last modified April 17, 2014.
- ¹⁰ *Growth Projections for Ottawa 2006-2031* (City of Ottawa), as adopted by City Council in November 2001, <http://ottawa.ca/en/city-hall/get-know-your-city/statistics/growth-projections-ottawa-2006-2031>, last accessed February 18, 2015.
- ¹¹ Taken from the City Profile page on the Invest Ottawa website, <http://investottawa.ca/why-ottawa/city-profile/>, last accessed February 18, 2015.
- ¹² *Ottawa: Where Talent Comes to Work, Play and Grow* (The Canadian Trade Commissioner Service), <http://www.international.gc.ca/investors-investisseurs/cities-villes/ottawa.aspx?lang=eng>, last modified February 2, 2015.
- ¹³ *Ottawa Scorecard*, part of the Global Cities project (Martin Prosperity Institute, 2013), http://martinprosperity.org/global-cities/Global-Cities_Ottawa.pdf.

- ¹⁴ Kimberly Silk, *Insight: Canada's Divided Cities* (Martin Prosperity blog, September 12, 2014), <http://martinprosperity.org/insight-canadas-divided-cities/>.
- ¹⁵ *Top 100 Festivals and Events in Ontario Announced* (Ottawa Festivals), <http://www.ottawafestivals.ca/blog/top-100-festivals-and-events-in-ontario-announced/>, last accessed February 18, 2015.
- ¹⁶ Taken from the Arts Funding Program page on the City of Ottawa website, <http://ottawa.ca/en/liveculture/arts-funding-program>, last accessed February 18, 2015.
- ¹⁷ Kelly Hill, *Municipal Cultural Investment in Five Large Canadian Cities: A study prepared for the City of Vancouver, the City of Calgary, the City of Toronto, the City of Ottawa and the Ville de Montréal* (Hill Strategies Research, January 2012), http://www.creativecity.ca/database/files/library/Municipal_cultural_investments_5cities.pdf.
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