



Live Music: Public Perceptions

Fall/Winter 2022

#FORTHELOVEOFLIVE



Funding for this study was provided by
Ontario Creates.

Executive summary

In the summer of 2022 the Canadian Live Music Association, with the help of Abacus Data, set out to explore consumer appreciation, confidence and perceptions of the return to indoor live music - both live and hybrid. Findings help the CLMA and its industry in supporting live music venues to develop recovery-related strategies for effective monetization and management of in-person, live-streaming, and/or hybrid models as music shifts back to primarily indoor settings this fall and winter.

This study found that the *vast majority* of Canadians **value** live music for its powerful effects on community, the economy and culture in this country; with positive impacts on mental health, community-building, cultural identity, diverse representation, and provincial and national economic strength.

“Over 80% of Canadians believe the live music sector has a positive impact on our country’s economy and the economy of their province. Similar numbers also say a strong live music sector is important both for our collective Canadians identity and showcasing the diverse backgrounds and identities of people in Canada.”

Findings also indicate that some Canadians continue to be hesitant to return to some live performances compared with pre-covid times. That Canadians both value and appreciate live music yet are not returning to certain venues/events at pre-pandemic levels creates both challenges and opportunities for the industry.

“The pandemic has impacted the decision-making process of attending a live music event, but not like it did at the beginning of the pandemic. Concerns about the virus itself have lessened significantly, and are more nuanced. Two thirds aren’t as concerned about getting COVID, including a majority of those yet to contract the illness. And for those who have experienced COVID-19, they are actually more comfortable attending events.”

Canadians Love Live Music

The Takeaways

Canadians love and value live music for its contribution to Canadian culture, mental wellness, and economy; however, fans are often hesitant to come to shows due to COVID-19.

The pandemic has impacted the **decision-making process** of attending a live music event, but not like it did at the beginning of the pandemic. Concerns about the virus itself have lessened significantly, and are more nuanced. Two thirds aren't as concerned about getting COVID, including a majority of those yet to contract the illness. And for those who have experienced COVID-19, they are actually more comfortable attending events.

There are still some COVID hesitations present (outdoor > indoor) but measures such as having staff stay home if they are ill are seem to have a big impact on increasing likelihood of attendance.

Instead, the long-term challenge will be combatting a **changed mindset**. Canadians have gotten comfortable staying at home, and will need more motivation to leave the house. They need to be **reminded** why they both loved and attended live music events pre-pandemic.



Canadians Agree That....

- **86%** of Canadians and **86%** of Ontarians agree that live music plays an important role in **mental health**, allowing for opportunities to socialize, provide connectedness and help with stress release.
- **82%** of all Canadians agree that live music is an important part of building our social connections and **a sense of community**.
- **82%** of Canadians and **85%** of Ontarians agree that a strong live music sector is important for our Canadian **cultural identity**.
- **81%** of Canadians and **84%** of Ontarians agree that live music plays an important role in showcasing the **diverse backgrounds** and identities of people in Canada.
- **81%** of Canadians and **82%** of Ontarians agree live music has a positive impact on our **country's economy**.
- **81%** say live music has a positive impact on the economy of Canada and **82%** say live music has a positive impact on the economy of Ontario.

"A strong live music sector is important both for our collective Canadians identity and showcasing the diverse backgrounds and identities of people in Canada."

Recovery is Slow

Concern about attending concerts **grows with venue size**, but outdoors vs. indoor appears to be the biggest driving factor with comfort.

- **64%** of Canadians are at least **fairly comfortable** attending a live music event at an outdoor space, while **62%** of Ontarians are comfortable with the same;
- Whereas between **40-50%** of Canadians and Ontarians are comfortable with any size of indoor event.

"This hesitation isn't limited to live music. Overall, Canadians are cautious about being in public. 57% say their comfort with public places hasn't returned to pre-pandemic levels."

Comfort for all venue types is higher among **young Canadians**, among **individuals who've had COVID** in the past, and music lovers. **Men tend to be more comfortable than women**, and those in Alberta or Atlantic Canada tend to be more comfortable than others.



Recovery is Slow

Aside from comfort, there are other behavioural drivers that may be making Canadians shy away from events.

Among Canadians, 72% feel there is less reason to leave the house these days; 64% say they are less interested in going to concerts compared to a few years ago. For live music lovers these numbers are 67% and 58%, respectively.

Among Ontarians, 71% feel there is less reason to leave the house these days; 64% say they are less interested in going to concerts compared to a few years ago.

Additionally, requirements that would increase comfort and increase likelihood of attending a concert:

- **57% CA & ON:** Requirements for venue owners to stay home when they are sick
- **49% CA/47% ON:** A requirement that all attendees be vaccinated against COVID-19
- **44% CA/45% ON:** A requirement that all attendees wear a mask
- **42% CA/44% ON:** A requirement that all attendees complete COVID-19 screening before attending



Recommendations

1. The live music industry should continue to work with others across tourism, travel and live events to **encourage governments to support a full and complete recovery of the hardest hit sectors** with dedicated programs, policies and targeted supports;
2. Governments and Public Health Agencies should work with the live music sector to encourage Canadians as to how they can safely attend live performances;
3. Live streaming activity should continue to be promoted to Canadians as a stop gap way to support artists, but not long-term in place of attending live shows;
4. The CLMA should undertake a national economic impact study to identify and bench-mark the current status of the sector to help plan for future growth.

Methodology

The survey was conducted with 1,500 Canadian adults with an oversample of 400 live music lovers, totalling 1,900 respondents from September 23 to 30, 2022. A random sample of panelists were invited to complete the survey from a set of partner panels based on the Lucid exchange platform. These partners are typically double opt-in survey panels, blended to manage out potential skews in the data from a single source.

The margin of error for a comparable probability-based random sample of the same size is +/- 2.248%, 19 times out of 20. The data were weighted according to census data to ensure that the sample matched the population according to age, gender, and region. Totals may not add up to 100 due to rounding. The “live music lovers” segment was self-identified with a survey question.

Any opinions, findings, conclusions or recommendations expressed in this material are those of the author and do not necessarily reflect the views of Ontario Creates or the Government of Ontario. The Government of Ontario and its agencies are in no way bound by the recommendations contained in this document.