Precarious Sounds: Labour in the Live Music Industry

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Abstract

Precarious Sounds: Labour in the Live Music Industry

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When the COVID-19 pandemic forced the cancellation of live concerts, thousands of industry workers across North America, including myself, were left unemployed. This research-creation project investigates the structural problems exposed by the pandemic and presents the personal histories of eight industry workers to better understand (and critique) pre-existing precarious labour conditions within the North American live music industry. Interviews were conducted with both musicians and behind-the-scenes workers, namely a sound technician, a tour manager, a promoter, a booking agent, a venue owner, and a music non-profit organization worker. These interviews were then assembled into podcast episodes. The podcast form was selected to create a dialogue between researcher and participant, while making the information easily accessible to non-academic audiences. Using Brooke Erin Duffy's concept of "aspirational labour" (2015) and the idea of creative precarity developed by Hesmondhalgh (2018), Ross (2008), and Curtin & Sanson (2016), this thesis demonstrates that the return of concerts post-pandemic uncovered significant flaws in the music industry. Workers are primarily self-employed and cannot access traditional workplace benefits such as weekly salaries, healthcare plans or retirement funds. They also work long hours in precarious conditions in the hopes of obtaining more lucrative opportunities. Yet, the pandemic-induced pause on live events has prompted many workers to reconsider fair treatment, leading to organized efforts to challenge these conditions.

Key terms: live music, touring, precarity, cultural labour, political economy

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List of Abbreviations

CLMA – Canadian Live Music Association
CMF – Canadian Music Fund
DIY – Do It Yourself
FACTOR – Foundation Assisting Canadian Talent on Recordings
FOH – Front of House sound technician
NIVA – National Independent Venue Association
TM- Tour Manager
UMAW – Union of Musicians and Allied Workers

Chapter 1: Load-In

Music has always been one of my passions. From being a 12-year-old mesmerized seeing blink-182 at my very first live concert, to going on a Canadian East Coast "do-it-yourself" (DIY) tour as a musician when I was 16, to hosting shows in my basement in my early twenties, I have been involved in numerous facets of the music industry. For over ten years now, my primary source of income has been working as a live sound technician. I have worked in small to large-scale venues, and mixed shows for touring artists across North America, Europe, and Asia. These diverse experiences have not only deepened my understanding of music's multifaceted essence but have also underscored the complexities and challenges inherent within the live music industry.

When I began my career at 22, I never considered that a global pandemic could leave me unemployed. In early March 2020, I was living in Los Angeles, California. Though there were talks about what COVID-19 could mean for touring, the American music industry at large was not yet worried. My European tour with Canadian indie rock artist Wolf Parade, scheduled to start March 1st, 2020, had been cancelled by the band 12 hours before we were to board our flights. To replace some of this lost income, I took a job as a "runner"[1] for a country act that was in town to shoot their *Rolling Stone* cover. While driving around LA looking for the lead singer's favourite green tea drink, I heard a DJ on the KROQ radio station announce: "we can't reveal our source, but we are hearing that this year's Coachella festival is being cancelled". For North American music fans, the two Coachella weekend music festivals mark the beginning of the spring touring season; this unofficial announcement was the catalyst in helping me realize that the music industry was in serious trouble.

Shortly after this announcement, the Canadian and American governments implemented emergency measures that dictated what industries were considered essential, while also banning or limiting public gatherings. These restrictions changed multiple times throughout the pandemic, but the consistent inability to gather in crowds had a severe impact on the live music industry. Thousands of industry workers across North America, including myself, were left unemployed (Henderson and Shelder 2021; Nordicity 2020). Other hospitality sectors were able to work around these conditions: restaurants were deemed essential and sold take-out, while film & television productions implemented COVID-19 safety protocols and continued shooting. As live events rely on full venue capacity to be financially viable, music industry workers were quick to realize that we would be among the last sectors to be able to return to pre-2020 work levels.

My research-creation project delves into the structural deficiencies exposed by the pandemic within the live music industry. Spotlighting the personal narratives of eight industry workers, I aim to both comprehend and critique the pre-existing precarious labour conditions pervasive in North America's live music scene (Gloor 2020). While there exists research on how neoliberal economic policies have affected the recorded music industry (Campbell 2013; Taylor 2016), the live music industry remains understudied even though live performances account for a growing share of artists' incomes (Delfino 2018, Tschmuck 2021, 136). Indeed, the changes in the recording industry brought on by the advent of streaming have established concerts as the highest-grossing sector of the music industry (Nordicity 2020, 13).

[1] A person hired to complete small tasks for an artist, such as purchasing items at stores or driving crew/musicians to different locations.

My research focused on the following questions:

- How is the live music industry a site of precarious labour?
- How do workers, specifically women and BIPOC individuals navigate this precarity?

To answer these queries, my study relied on:

- A literature and media review
- Interviews with musicians and other industry workers, including a booking agent, a concert promoter, a small venue owner, a live sound technician, a tour manager, and an employee at a music non-profit
- My own experiences within the music industry

This research-creation project culminated in the creation of a podcast series that highlighted the voice of my interview subjects as well as my own. Primary research material was obtained through interviews conducted in 2023 with eight music industry professionals living in Canada and the United States (US). I defined a professional as an individual who was employed in the industry before the pandemic and makes most of their income from work within music. This criterion excludes "weekend warriors" or individuals who play music, record albums, or promote concerts as a recreational pursuit. By focusing on professionals, I was able to examine the persons most impacted by the pandemic industry shutdowns and explore the reality of what working full-time hours in the live music industry in 2023 entailed. North America was selected as the geographical scope of this project as my personal experience has primarily been working in Canada and the United States. Furthermore, the United States is the most important music market in the world, with Canada coming in at eighth globally (Cross 2023). Participants ranged in age from 22 to 43. I interviewed five women and three men. Of these eight participants, six are white, while two are BIPOC.

Throughout my work, I have seen the joy live music brings to both live audiences and workers within the industry, as well as the negative aspects of -pursuing employment in the entertainment field. Time spent away from loved ones, mental and physical health problems and intensely long workdays are only some of the trials faced by live music workers. Four years after the initial shutdown, the industry is still in flux and facing new issues. These challenges include technical labour shortages and rising inflation impacting hotel, vehicle and production equipment rental costs, all amidst musicians and crew still contracting COVID-19 and subsequently having to re-schedule or cancel shows while incurring substantial financial losses (Friend 2022, Knopper 2023). Since spring 2020, I have watched friends leave the industry for more secure work; seen individuals struggle with health and financial concerns; and questioned my involvement in such precarious employment. While the pandemic was undoubtedly devastating for the music industry, what remains to be seen is how an increased awareness of the precarious nature of our work will serve as a catalyst for change.

Literature Review

I focused my research on three broad themes:

- economics, music, and the pandemic;
- creative labour and precarity;
- and gender and racial inequality in the music industry.

Though touring specifically remains understudied in academia, these three research areas help us contextualize the issues at stake within the live music sector in North America.

Economics, Music, and the Pandemic

Numerous authors such as Taylor, Tschmuck, and Holt, have looked at how changes within the music industry have impacted physical album sales. The rise of streaming has fundamentally changed how individuals consume music as well as how musicians earn income, which in turn has impacted the live music sector.

Taylor's 2016 book *Music and Capitalism* examines how neoliberalism has affected the music industry. He focuses on how digitization has transformed music, namely how advances in technology have changed production, distribution, and consumption. Taylor briefly discusses how concerts have changed purpose: from once serving as an opportunity to sell or promote records, they now are a main source of income for artists (Taylor 2016, 24). Yet, by not looking closer at live music, he misses a crucial part of the current industry's economics. If concerts are now the primary source of income, current studies must examine how neoliberalism impacts work conditions for both musicians and industry workers.

Holt's *Everyone Loves Live Music* takes a closer look at live concerts and touring through an examination of the structure of both commercial music clubs and festivals. His argument revolves around the notion that large corporations such as Live Nation Entertainment are negatively affecting music communities. While I do not disagree with this position, I believe there could be more nuances in his reasoning; independent promoters and venues do not automatically make for better experiences for artists and their crew. As my research demonstrates, certain artists seek Live Nation shows because of their larger guarantees for show payments (Lilac 2023).

The recently published second edition of *The Economics of Music* highlights how the financial aspects of the modern music industry have changed since its inception (Tschmuck 2021). Tschmuck demonstrates how live music is now the highest-grossing sector of the business and begins to examine how the pandemic has affected the profession. While his description of music industry economics, specifically his chapter on the live sector, is useful for this thesis, he solely focuses on European countries and the United States and does not include statistics or information about Canada. Though the Canadian music industry is strongly tied to that of our neighbours to the south, we operate in an ecosystem where grants are available to artists. These publicly funded subsidies make us closer to the European artistic community. Furthermore, as the book was published in 2021, it also does not adequately examine current conditions within the industry.

As a leader in the field of economics and music, Tschmuck et al. (2022) has published on the pandemic's impact on the economics of concerts. They looked at the academic impact of the pandemic on classical musicians in Austria and concluded that female musicians lost a larger portion of their income than their male counterparts. They state that classical musicians in Austria fared better than in popular music genres due to their contracted orchestral work as well as side-work opportunities such as teaching and composing (Tschmuck et al. 2022, 52). Similarly in Europe, Bloemeke et al. (2022) studied the impact of the pandemic on German music venues, concluding that the economic impact of the pandemic highlighted the need for government intervention and programs that support venues in paying artist fees, staffing costs and other related expenses due to their important function in modern society (Bloemeke et al. 2022, 103). These studies point to the need in research that looks at the gig economy and its subsequent impact within the music industry, as well as the importance of government subsidies for cultural

enterprises. My study examined both the pandemic's financial impact while questioning how government agencies and music lovers can support musicians and music industry workers.

Beyond academia, several professional associations in North America have funded research. The Canadian Live Music Industry Association (CLMA) has conducted several studies in partnership with the Nordicity consulting firm. They looked at the economic impact of the pandemic on music venues in Toronto in 2020 (2020). While Toronto is the center of the anglophone Canadian music industry, focusing on one city does not provide an accurate picture of the full impact of the pandemic. This study was conducted in 2020 and provides a picture of the early pandemic; the industry did not return to pre-pandemic levels of shows and income until late 2022.

A more recent study organized by Wavelength Music and the University of Toronto looked at venues across Ontario (Silver & Bunce 2023). They found that even before the pandemic, the industry witnessed more venue closures than openings, accompanied by escalating ticket prices and fewer shows. The reduced perceived monetary value from audiences, insufficient compensation for artists, and growing operational costs for owners/operators present a significant challenge for venues. (Silver & Bunce 2023, 5). In the context of my research, this demonstrates that there is an awareness of precarity, yet the public does not appear to agree with higher ticket pricing.

As academia has not fully studied the consequences of the pandemic, industry magazines such as *Rolling Stone* and *Billboard* as well as news outlets such as *The New York Times* and the *Canadian Broadcasting Corporation* also served as relevant source material. Throughout the pandemic, they published several articles examining how music industry workers were affected: from the cancellation of all concerts and its impact on freelancers (Domanick 2020, Sisario & Ryzik 2020) to the repercussions of inflation on touring expenses (Benchetrit 2022, Knopper 2023) these sources contextualize the financial impacts of the pandemic on music workers within the public discourse.

Creative Labour and Precarity

Although the term precarity is used in numerous government and academic reports, a 2019 Canadian House of Commons report states that there is "no universally accepted definition for this concept. (…) This also is in large part due to the fact that precarious work is not a single problem but a group of interconnected problems." (House of Commons 2019, 7). Indeed, precarious workers are often underpaid and overworked, while lacking access to benefits or the means to advocate for better working conditions. (Government of Canada, 2022). Furthermore, as Neilson and Rossiter state, precarity should be understood as the norm and not the exception within modern society; capitalism has moved beyond Fordism and has created working conditions that favour short-term employment and a lack of benefits (Neilson & Rossiter 2008, 58). In the context of the creative industries, the "gig economy" has long been the norm: musicians are not paid a daily wage, but instead rely on concert income, grants and revenue from streaming, advertising partnerships, and other forms of income to pay their bills. On the backstage side, sound technicians and other stage workers are generally paid per shift and are not salaried. This inconsistency in work opportunities leads to what Ross (2008) argues is an environment in which some "thrive, but most subsist" in a "cycle of feast and famine" (Ross 2008, 36). Furthermore, musicians and other industry workers rarely have access to health benefits, pension plans, or job security.

The idealization of creative work and its impacts on both workers and society in general has been observed by numerous researchers. McRobie has examined how "the promotion of creative work has (…) become a depoliticizing strategy, a way of removing politics from work and replacing it instead with notions of self-gratification, reward, and self-expression" (McRobie 2009, 124). The opportunity to work in a creative field then becomes "enough" of a reward for the worker, who no longer requires access to social benefits such as pensions (McRobie 2009, 136). Similarly, through a study of three British cultural industries, which relevantly included recorded music, Hesmondhalgh and Baker highlighted many issues that are prevalent within creative work; namely that short-term contracts foster inequality, the issue of the blurring of work and leisure within this field as well as worker exploitation through long hours and low pay (Hesmondhalgh and Baker 2011, 220-221). The authors highlight the fact that the opportunity for self-realization is high in artistic work, which acts as justification for the working conditions (Hesmondhalgh and Baker 2011, 221-222). Such perspectives help researchers understand both the appeal and tensions present within the music industry.

Some of the negative aspects of creative work are physical. Academics have recently begun studying the specific bodily impacts of being involved in live music. Newman et al. (2022) examined the high rates of mental health issues within touring communities. While data collection was completed before the start of the pandemic, they concluded that music industry workers faced higher levels of depression and anxiety than the general population (Newmal et al. 2022, 246). While the authors recognized that there was an overrepresentation of white male participants in their survey, this reflects the current makeup of industry participants (Newmal et al. 2022, 247). Though my work does not explicitly touch on mental health, bodily and mental impacts should be understood as causes of precarious work and deserve further research. Academics have begun to look more closely at the manners in which individuals labour in media and production. A recent PhD thesis by Kielich examined the everyday life of behind-the-scenes music industry workers through a series of interviews and participant observations with long-time crew members. Though beyond the scope of her study, Kielich recognizes that work in the industry is precarious for a variety of reasons, such as short-term contracts and freelance work (Kielich 2021, 253). Yet, she notes that "freelance work is also marked by relative stability that is the product of accumulated experience and forms of capital that are generated through reputation and networks of contacts." (Kielich 2021, 253). While this position might be reflected in the crew members she interviewed, who were older individuals working with established acts with consistent touring schedules, participants in my research project were quick to point out the instability of the music industry, a field with limited full-time job prospects. Having industry contacts and a good working reputation does not guarantee employment, and the constant pressure of finding contract work weighs heavily on workers.

The most gaping hole in this field is that there exists little to no academic research conducted by individuals with working ties to the industry. A former sound technician himself, Zendel (2014) wrote his master's thesis on precarity within the sound technician industry in Calgary. He chooses the term "lifestyle labour" to describe individuals who actively engage in satisfying employment instead of pursuing secure work opportunities (Zendel 2014, 71). For Zendel, accepting this labour form normalizes long work hours, low wages, temporary employment and overall precarity within the live sound industry (Zendel 2014, 83). I find this concept useful to understand the appeal of creative work, but it also places blame on the individual for the conditions in which they labour. Zendel continued his work on touring by writing his PhD thesis on how the geographical impact of touring "produces a socially, temporally, and spatially fragmented livelihood and lifestyle, making workers uniquely

precarious". (Zendel 2024a, in press, iii). His pre-pandemic study consists of interviews with 40 musicians and technicians, with a particular focus on how gender shapes the touring experience (Zendel 2024a, in press, iii). He concludes that while women currently face inequalities throughout the cultural industries, the current dynamics of touring exacerbate the disparities between male and female industry workers (Zendel 2024a, in press, 113). Though this study is useful for examining issues that existed before 2020, it cannot account for how the business has transformed since the pandemic.

As current research on precarity within the music industry is limited, outside concepts offer a better explanation for current working conditions. Duffy's concept of "aspirational labour" was initially conceptualized to explain unpaid work in the digital culture industries. For Duffy,

> aspirational labourers pursue creative activities that hold the promise of social and economic capital; yet the reward system for these aspirants is highly uneven. Indeed, while a select few may realize their professional goals – namely to get paid doing what they love – this labour ideology obscures problematic constructions of gender and intersectionalities with class. (Duffy 2015, 443)

While other theorists have examined unpaid work, Duffy's analysis includes a strong focus on gender and class. Applied to the music industry, her theory can help explain how certain individuals remain unpaid/underpaid for their work.

Much like with the study of economics and music, professional organizations have also commissioned their own inquiries. The CLMA organized a study on labour in the Ontario music industry through Nordicity. Originally contracted due to a perceived labour shortage in the industry, the study found that there are nuances to this worker shortage: skill gaps, communication issues amongst industry players, barriers to entry for new workers and working conditions are only some of the reasons for this diminished workforce (Nordicity 2023, 29). Their sector infrastructure requirements are particularly applicable to my research, as they recommend the industry works towards a better work/life balance and economic sustainability (Nordicity 2023, 15). While the CLMA does important research, it is an organization founded by individuals who work(ed) for Live Nation, Evenko, Ticketmaster and other large Canadian music corporations ("About Us", CLMA). Many of the precarious working conditions within the music industry such as part-time employment, low wages and long hours are a direct result of their managerial decisions.

Like with the creative industries in general, a fundamental aspect of labouring in music is then recognizing the precarious workplace environment. Low pay, short-term contracts, and lack of benefits are just some of the issues currently plaguing the industry, though these should be understood as general conditions of labouring under capitalism in a changing workforce. As the system currently favours worker flexibility over stability, a fundamental societal change will need to be enacted to improve working conditions.

Gender and Racial Inequality in the Music Industry

Though creative labour is inherently precarious, not all workers feel its effects in the same manner. Recent research has demonstrated that women, gender non-conforming individuals and BIPOC persons are underrepresented and underpaid compared to their cis-male counterparts within the music industry, regardless of which sector they labour in (Women's Audio Mission

2023, Smith et al. 2022, Brooks et al. 2021). Furthermore, they face barriers to entry, and are often subjected to sexist and racist commentary, making their work in the industry more fraught. While studies have been conducted on gender inequality, racial discrimination remains understudied.

As with economics and precarity, more attention has been focused on musicians and the recording industry than on the live music sector. A recent study completed by Smith et al. (2022) looked at the top 100 Billboard charting songs and noted which artists, songwriters and producers were credited over a 10-year period. Women make up only 21.8% of artists, 12.7% of songwriters and 2.8% of producers on the chart; these statistics do not adequately reflect the fact that 51% of the United States population identify as women (Smith et al. 2022). Such barriers to achieving commercial success can explain why many female artists, songwriters and producers are financially less stable than their male counterparts.

In line with these findings, the Audio Engineering Society, an organization that organizes conferences and offers resources to audio engineers, examined discrimination in recording studios through a global study. Brooks et al. (2021) demonstrated that cisgender women in the recording industry experience substantially more sexually inappropriate comments and unsolicited observations about their physical appearance than their male counterparts, while having their leadership and technical skills undermined (Brooks et al. 2021, 238). Women currently make up an estimated 5% of audio professionals across all fields (Women's Audio Mission 2023). These difficult working conditions can help explain the lack of gender diversity.

Professional organizations have also investigated gender and race issues in music. Studies conducted in both Canada and the US have demonstrated that women (Prior et al. 2019, Women in Music Canada 2021) are underrepresented in managerial roles within the industry. Furthermore, racialized women recognized that they felt less supported within the workplace and were even less likely to be in senior roles than their white peers (Prior et al. 2019, 1). Through a study of artists, owners/entrepreneurs, and workers, the CLMA concluded that BIPOC constitute only 17% of the Canadian live music industry (Nordicity 2022, ii). They earn significantly less than their white counterparts (Nordicity 2022, ii). As precarity is pervasive within the industry, examining which additional factors exacerbate these conditions is necessary to remedy this problem.

Media Review

My research-creation output was inspired by the format of Cherokee journalist Rebecca Nagle's "This Land". In this podcast, Nagle looks at a Supreme Court case about tribal land in Oklahoma. She interjects herself in the story and reminds the listener of her personal link to the subject, but also features interviews with other individuals who will be impacted by this court ruling. I followed her storytelling model by interposing my experiences with my research findings. Other sources of inspiration include the "Women in Sound" podcast, produced by Madeleine Campbell and Katie Lau. Campbell interviewed female live sound engineers, mix and mastering engineers and musicians in a casual format while showcasing their musical works. As women are underrepresented in the music industry, these episodes serve to highlight their voices and contributions. I followed their lead and prioritized interviewing women for my work. "Women in Sound" follows a traditional interviewer-interviewee relationship: the host asks a question, while the guest answers. In my work, I allowed myself to answer questions, as I am an industry worker with my own perspectives. By interjecting my thoughts into the final edit, I created a livelier discussion.

Chapter 2: Set-Up

While many factors explain why precarity exists in the music industry, my research demonstrates that two main theories that can contextualize my findings. These two concepts are Brooke Erin Duffy's concept of "aspirational labour" (Duffy 2015) as well as the notion of "creative precarity", which has been developed by theorists such as Hesmondhalgh (2019), Ross (2008), and Curtin & Sanson (2016).

Aspirational Labour

Post-industrial society glamourizes creative labour: it is seen as an accessible form of work where it is possible to mix pleasure, income, and autonomy (Duffy 2015, 444). As it is currently structured, artistic labour relies heavily on the neo-liberal tenet that individuals should assume all risks and responsibilities. Indeed, very few creative workers have access to benefits or full-time employment. It is in this context that Duffy developed her concept of "aspirational labour", which was initially theorized to explain unpaid and/or underpaid women working in the digital culture industries. For Duffy, aspirational labour is then "a forward-looking, carefully orchestrated, and entrepreneurial form of creative cultural production. (…) [A]spirational labourers seek to mark themselves as creative producers who will one day be compensated for their talents – either directly or through employment in the culture industries" (Duffy 2015, 446). There is a strong element of hope in this form of labour: the women assumed that if they worked hard enough, they would be able to both be compensated for their time and gain meaningful employment.

To develop her theory, Duffy conducted interviews with various women who created content, either through blogging sites or other social media platforms, in the lifestyle/fashion industries (Duffy 2015, 445). While numerous other theorists have examined the issue of unpaid work in creative fields (Zendel 2014, Mackenzie & McKinlay 2021, Hesmondhalgh 2019) Duffy's study is grounded in an analysis that pays close attention to the impacts of gender and class in content creation. She explains that digital labour relies on socially constructed notions of gender, which are produced through discourses of authenticity, affective relationships, and brand devotion. In the context of authenticity, advertising campaigns often rely on the notion that an ad reflects an ordinary person using a product; the bloggers studied portrayed themselves as unexceptional consumers. Yet as Duffy demonstrates, this illusion of authenticity could not hide the fact that the bloggers were far from average: they conformed to traditional beauty standards, were well-educated and often had substantial amounts of social and economic capital (Duffy 2015, 447-8). Bloggers had to partake in a substantial amount of online networking and emotional labour to increase their social metric by commenting on other posts and remaining socially active, an activity that is typically coded as feminine (Duffy 2015, 449). Finally, Duffy uses the term brand devotion to describe how bloggers constructed an online persona for themselves and sought to only work with brands that aligned with this idealized version of themselves (Duffy 2015, 451).

Though aspirational labour was originally coined with female bloggers in mind, Duffy herself recognizes that it can be applied to other contexts such as academia. Academics fall prey to "many of the same venerated ideals - autonomy, flexibility, the perennial quest to "do what one loves" while working long hours on precarious contracts and must market themselves as a brand to promote their research" (Duffy 2017, 230). It feels appropriate to include it in my discussion as this relates to numerous aspects of working within the music business. As with content creators, music industry workers often labour for little or no wages in the hopes of gaining better work

opportunities, whether that be being selected for a tour or signing a record deal. As with being a content creator, there is a strong element of hopefulness in the work: perhaps today's low-paying gig will lead to the big break needed to "make it" and achieve a well-remunerated and successful career. Duffy's examination of the role of gender and class as aspirational labour also applies; as demonstrated by my research, the business side of the industry relies on female labour to complete entry-level jobs such as assistant positions. Artists are understood to be content creators because they upload songs they have created on digital streaming platforms and social media sites, to the primary financial benefit of tech companies. Similarly, many other industry workers maintain a strong online presence and create content which advertises their own "brand", reinforcing tech company incomes. Furthermore, gender and class play defining roles in who succeeds in the industry: much like with the underpaid bloggers, access to familial wealth allows artists and other workers to invest substantial amounts in the beginning of their careers, thus ensuring that a low or non-existent income does not affect their livelihood.

Creative Precarity

Creative precarity is a concept developed by several scholars such as Ross (2008), Hesmondhalgh (2019), and Curtin & Sanson (2016) that explains current working conditions in the music industry. The rise of discontent in the 1970s with traditional, repetitive office and factory jobs led to a desire for employment opportunities that favoured creativity and flexibility (Ross 2009, 5). The appeal of self-employment also grew, as neoliberalism preached that individuals were the only ones who had full control over their economic destinies. It is in this culture that workers began looking for opportunities that could both fulfill their passions and the need for income. These employment trends were strongly influenced by the work opportunities that already existed in the cultural industries, a field where individuals were accustomed to working on different projects for multiple employers, while not having access to traditional workplace benefits such as healthcare, permanent positions and paid time-off. The changing marketplace has created an environment where individuals can no longer expect to work a singular job throughout their lifetime; precarious employment trends are on the rise for both service sector occupations and the traditionally secure white-collar professions (Ross 2009, 2).

Hesmondhalgh has observed that workers in creative fields tend to be freelancers, who work short-term contracts, have uncertain career prospects, tend to skew younger than in other sectors, and face uneven income allocation (Hesmondhalgh 2018, 351). Indeed, while high-level executives make a good living, a vast majority of workers rely on other employment, familial wealth, or social assistance programs to subsidize their cultural work income (Hesmondhalgh 2018, 351). In Hesmondhalgh's words, cultural industry workers often faced

> a low quality of working life: short-term jobs constrained their ability to make their work the basis of meaningful self-realization; autonomy was often highly constrained, many workers left the cultural industries at an early age, burnt out by excessive demands and uncertainty about the future. (Hesmondhalgh 2018, 355)

Furthermore, not every worker faces the same precarious conditions within this unstable industry. Women, racialized and lower-income persons are underrepresented within the workforce and face barriers to employment related to the issues of sexism, racism and classism that are prevalent throughout modern society. Managerial roles are primarily occupied by white, male, and upper-class individuals. For Hesmondhalgh, current initiatives to increase BIPOC access to cultural work opportunities fall short, as they do not address the racism that these employees will face in

the workplace (Hesmondhalgh 2018, 357). His research has demonstrated that women are mainly employed in marketing, public relations, and coordination roles, while technical and creative roles are primarily occupied by male workers (Hesmondhalgh 2018, 358). While the cultural industries make significant contributions to the economy, his studies demonstrate that working conditions remain difficult (Hesmondhalgh 2018, 370).

In line with findings by Ross and Hesmondhalgh, Curtin & Sanson's anthology *Precarious Creativity* (2016) examines changing work conditions in the cultural industries, with a primary focus on film and television. They reaffirm that creative work has grown increasingly precarious. They make the case that the rise in international productions has created an industry where interregional competition for work opportunities has led to lower pay rates and fewer social benefits for workers (Curtin & Sanson 2016, 2). As media corporations are seeking ways to lower their production costs, they look for ways to hire cheaper labour. While the Hollywood film industry is primarily a unionized space and has a long history of fighting for the rights of its workers, whether they be actors, writers, or crew members, the need for cheaper production costs has created precarious and temporary work environments both in North America and abroad. To attract Hollywood productions, many of these regions are willing to offer lower costs as well as less stringent labour laws that are unsafe for workers (Curtin & Sanson 2016, 3). It is in these contexts that accidents and deaths on set happen. The authors also note that the fear of losing their jobs leads many young workers to accept these challenging working conditions; this silence impedes the possibility of collective action and industry transformation. (Curtin & Sanson 2016, 4). Yet, they remain optimistic that workers will be able to able to better the cultural industries.

In the music industry, union membership is not as present as in film and television. As with media companies, music corporations have sought to cut expenses by maintaining low labour costs in the form of both artist payments and adjacent workers to increase revenues. While the working hours in live music are as long, if not longer, than on film and television sets, there has been little pushback by workers on these dangerous employment conditions. As a business that relies on touring across the vast geographical area of North America to become profitable, it has been difficult for musicians and crew members to find common grounds and organize for change. Yet, the pandemic and increased social awareness of issues facing music and live music workers has led to the creation of a variety of groups such as the Union of Musicians and Allied Workers (UMAW) who are striving for change.

Precarity in the music industry can then be explained by focusing on two main theories: Brooke Erin Duffy's concept of "aspirational labour" (2015) and the notion of creative precarity developed by Hesmondhalgh (2018), Ross (2008), and Curtin & Sanson (2016). Duffy's notion of aspirational labour is foundational in explaining why so much of the music industry continues to work long hours in uncertain working conditions. The interviews I conducted demonstrate that it is this hope for better opportunities and remuneration that fuels artists, concert promoters, booking agents, venue owners and production staff. Creative precarity is at the heart of current working conditions within the music industry. My research also illustrates that creative labour relies heavily on the neoliberal tenet that individuals should assume all risks and responsibilities in their careers, resulting in few creative workers having access to benefits or full-time employment. Though the industry tries to promote diversity, current initiatives to increase access often fall short. While conditions might seem bleak, the forced stop caused by the pandemic has caused many workers to reconsider what is fair, and groups are organizing to challenge working conditions.

Chapter 3: Soundcheck

Research-Creation

This thesis is a work of research-creation, while being grounded in the principle of autotheory. While academia has traditionally privileged neutrality and distance from a research subject, my lived experience and active participation within the industry have created a work project that is more substantial and informative, while being respectful of my research participants' experiences. Academic research in a social sciences context can be an extractive process, where participants are asked difficult questions while not being compensated for their time, all for the researcher's gain. The pandemic was a difficult time for the music industry, and as I also lived through it, it allowed me to both relate and shape my questions respectfully.

This project engaged in both "research-for creation" as well as "creative presentation of research" (Chapman and Sawchuck 2012, 16-18). These modes of research-creation consist of conducting "traditional" research (literature reviews, interviews) and then assembling findings in an artistic manner (Chapman and Sawchuck 2012, 15). My practice is based on what Loveless calls "ethico-erotic form", or the notion that new forms of research questions require new research outputs (Loveless 2019, 28). For Loveless, research-creation is based on passion, and allows an individual's love (eros) for a subject to guide their inquiry while pushing back against traditional academic frameworks of assessment and outputs (Loveless 2019, 28). I came to my research questions through my extensive experiences in the music industry; the hours I spent honing my craft as a sound engineer were based on my deep love for music and working with artists. This enthusiasm is what is pushing me towards looking at ways in which the industry can become more sustainable.

Beyond simply offering me the opportunity to creatively present my research, research-creation allowed me to introduce my voice more effectively in my research outcome. Traditionally, interviews are meant to feature the interviewee, as researchers often operate outside the communities they study. In a traditional thesis, these interviews are then transcribed, and selected quotes are inserted in the final work. By producing a podcast, I was able to feature my thoughts and comments as I interviewed. This created a more collaborative interview process, as well as allowed me to be featured as a project narrator. Furthermore, podcasting allowed me to illustrate the intricacy of these issues with more nuance than in an essay. By using a format that is based on the storytelling form, I was able to adequately represent the complexity of opinions and differing answers to my research questions while preserving my interviewee's voices.

The research-creation process taught me that active researcher involvement in data collection can produce different results. Initially, I was more concerned with leaving space for participants to answer during interviews, rather than offering my perspectives. Upon further reflection, I believe this wasn't the right approach: inserting my thoughts would have created more of a rapport on the topic and could have generated further conversation, as it did in my interview with Chloe. My baseline questions could have been improved, as certain questions confused participants. It would have been more organic to record a pre-interview on conditions in the music industry, and then ask my research questions in more accessible terms.

The materiality of sound itself also became a method. Based on Loveless' idea of the importance of interdisciplinary form in research-creation (Loveless 2019, 44), I used the accessibility of audio to share my findings. Indeed, academic research often remains inaccessible to the greater public due to the use of difficult-to-comprehend and often jargon-laden language.

By making my research findings available through the podcast form, which was scripted using common language, I can share my findings with a broader public.

Additionally, I followed the autotheory method. Autotheory is best described as "theory and performance, autobiography and philosophy, research and creation, knowledge that emerges from lived experience and material conceptual experiments in the studio and in the classroom (Fournier 2022, 29)". This form of research has deep roots in feminism; the concept of intersectionality was developed partially through the works of BIPOC and queer women writing about their personal experiences from the 1970s to the 1990s (Fournier 2022, 24). As their perspectives were not represented in academia, it is through this influx of new books that their views and struggles came to be understood by society. While feminists re-introduced autotheory to the public eye, several influential scholars such as Marx and Freud wrote in an autotheorical manner by incorporating their own lived experiences in their writing to develop their concepts (Fournier 2022, 37). While writing about oneself could be seen as self-centred, developing theories through personal experiences can allow others to relate to our work and then serves to facilitate the creation of new unifying concepts (Fournier 2022, 276).

I approached this research through my positionality, which is that of a white woman in her mid-thirties with 15 years of work experience in the music industry. Beyond my own knowledge, the primary basis of my research consisted of interviewing eight music industry professionals living in Canada and the United States. As a recipient of a Social Sciences and Humanities Research Council grant, I was able to offer participants a $50 CAD or $40 USD honorarium for their time.

I defined a professional as an individual who makes most of their income from work within the music industry. Participants ranged in age from 22 to 43. I interviewed 5 women and 3 men. Of these 6 participants, 6 are white, while 2 are BIPOC. I was selective in who I approached as participants, as I wanted to prioritize non-men and BIPOC participants in this study, as they often experience sexism and racism in the industry. Gender and race were therefore an important aspect of who was selected as participants, though I did not include any specific questions relating to gender or racial discrimination. This decision was made to prioritize conversations on the impact of the pandemic while also not making participants feel as if they were only selected as they are part of a marginalized group. As a woman working in a male-dominated field, I recognize that it can be tiresome to answer questions about sexism. Yet, participants still spoke of instances of sexism without being prompted. Furthermore, as a white woman, discussing race with racialized participants is difficult; my positionality has an impact on what participants feel safe in sharing. One BIPOC participant touched on the impacts of racism in our interview.

These 8 interviewees were selected because they were friends or work colleagues. This approach was chosen as I assumed that a pre-existing rapport would allow for deeper conversation. Unfortunately, this proved to only be beneficial in half of the discussions; the formality of an academic interview made certain participants visibly nervous. In the future, I will consider working with strangers, as participants who volunteer might be more comfortable being recorded. Though imperfect, these interviews provided valuable insights on the current state of the music industry.

I envisioned completing four episodes for this research podcast, with each episode focusing on a different sector of the industry. At the time of writing, I have completed the editing and mixing of two full episodes but have referenced the recorded interviews for the forthcoming episodes in my written work.

Podcast Episode Descriptions

Episode 1: Musicians

Musicians are the foundation of the music industry. They write songs that are recorded and released independently or on record labels. As income from recorded music has lowered since the popularization of streaming, most musicians spend an extensive amount of the year playing live concerts to gain income.

In this episode, I profiled 2 artists:

- Katie Stelmanis/Austra, referred to by her musician's name in this study to differentiate her from another participant with the same first name (38-year-old Musician based in Toronto, CA)
- Chloe Lilac (22-year-old Musician based in Los Angeles, USA)

Episode 2: Concert Booking Staff

When artists decide to go on tour, there is a team of behind-the-scenes staff who help organize the concerts. Booking Agents coordinate with artists and their teams to determine the scale of the proposed shows, based on factors such as prior ticket sales, desired length of tour as well as location of concerts. Booking agents then reach out to concert promoters across the geographical territories in which they are representatives for an artist and try and secure show offers that align with an artist's goals (tour length, artist fees).

Concert Promoters are the logistical organizers: they assume the financial risk of a concert by most often promising an artist a minimum financial guarantee in exchange for their performance, while also booking venues, equipment, and staffing. Concert promoters primarily make their money through percentage deals: once a concert's ticket revenue has covered all expenses, both the promoter and artist can make additional money from the "back-end" of revenue. Certain concert promoters make revenue deals with outside brands, which allows them to make money off alcohol or other brand partnerships at their event.

Finally, Venue Owners own the spaces that promoters rent to host their concerts. Venue owners are responsible for hiring necessary venue staff such as bartenders, sound technicians and security personnel. While there are numerous independent venues, large-scale concert promotion companies such as Live Nation and AEG own venues and increased their venue holdings during the pandemic (Cross 2023).

Though I interviewed 3 participants, I chose to only feature Rebecca and Timur in the podcast episode due to time constraints.

- Rebecca Gekht (26-year-old Booking Agent based in Montreal, CA)
- Timur Inceoglu (36-year-old Concert Promoter based in Calgary, CA)
- Sergio Da Silva (40-year-old Venue Owner based in Montreal, CA)

Episode 3: Crew Members (forthcoming)

Once an artist is finally ready to play their tour dates, it is typical to have crew members on board to assist with a variety of tasks. On smaller tours, one person might be working several jobs: for example, as a Tour Manager/Front of House technician. Tour Managers are responsible for coordinating logistics between promoters and the artist, organizing the day's schedule, booking hotels and transportation, financially settling a show, amongst other tasks. Front of House technicians mix the audio the audience hears and are responsible for balancing vocals and instruments in a pleasant manner. On larger-scale tours, Production Managers are brought on to

coordinate all technical aspects of the show, from equipment rentals to coordinating local labour hires. Production Managers and Tour Managers often have assistants to support them in completing their tasks. It is not common for arena and other large-scale venue tours to have upwards of 80 travelling crew members.

Guests in this episode will include

- Christopher Paules (42-year-old Production Manager/Tour Manager based in Los Angeles, USA)
- Katie Lau (33-year-old Front of House technician and Musician based in New York City, USA)

Episode 4: Music Industry Support Workers (forthcoming)

Touring can take a heavy toll on both musicians and crew members. There are several non-profit organizations across North America whose mandate is to support music workers by providing access to therapy and funding for medical emergencies. As an Artist Relation Manager, Anna was responsible for promoting Unison, a Canadian non-profit that supports industry workers through financial help and access to mental health resources. She was let go from her position in mid-2023 after Unison downsized their staff. To complete this episode, I would like to speak with someone working at an American non-profit such as Backline, The Roadie Clinic or the Union of Musicians and Allied Workers (UMAW).

In preparation for this episode, one interview was conducted with

- Anna Ruddick (40-year-old musician and former Artist Relations Manager at Unison, based in Toronto, CA)

All eight participants were selected for their individual experiences within the music industry. I have a personal relationship with all interviewees, having worked alongside all of them in different capacities.

Participants were asked the below seven questions, with appropriate follow-up questions as necessary. Interviews ranged in time from 15 minutes to 45 minutes and were edited for length and clarity

Baseline questions for participants:

- Can you tell me your name, age, and where you live?
- When did you get involved in the music industry?
- Can you explain in more detail what your job entails?
- How did the COVID-19 pandemic affect your work in the music industry?
- Did the pandemic change the way you perceive your work in the music industry?
- Do you think the music industry should be changed in any way? If yes, how?
- Between inflation and the rising costs of living, what will touring look like moving forward?

Coding

Before editing the audio, I used the Otter.ai transcription software to generate transcripts. I used these transcripts to decide which portions of the interviews I wanted to highlight in both my audio and written works.

To gather data, I compared the answers of participants working in similar parts of the music industry. For example, musicians were contrasted with other artists, while behind-the-scenes workers such as sound technicians were compared with other crew members such as production managers. Though individuals working in the music industry face similar challenges, the individual skills that everyone must possess to work in their field make it difficult to equate the different roles, for example, comparing a musician's struggle with those of a talent buyer. While a musician must create new music and market themselves to remain relevant in this fast-paced industry, those working in concert promotion must decide which acts are worth taking a financial risk on while staying ahead of musical trends. It would be unfair to compare artistic skills to logistical or business abilities, and vice-versa.

Recording & Editing

I recorded over five hours of interview material for this project, with several interviews nearing the one-hour mark. To obtain the best audio quality, I prioritized interviewing participants in person in a quiet setting, using two separate microphones and an audio recording interface. I used the audio recording software Riverside.fm to obtain high-quality individual audio files of interviews I conducted remotely. Remote recordings were trickier, as not everyone had access to recording equipment. I had to remind participants to use headphones to avoid audio feedback loops. I had to stop three interviews to remind participants to not tap on their tables or chairs, as this sound is picked up by microphones and distracts from the interview answers.

Working off audio transcripts, I then edited the audio in Pro Tools software to keep the selected audio clips for my podcast. I used the playlist function, which allowed me to keep an unedited version of the participant's audio I could always compare to the edited track. Editing can be a tedious process, as not every "umm," "ahh," or other distracting sound can always be removed: it is important to maintain a natural flow to the participant's speech (Abel 2015, 32). Other editing factors included when participants did not always fully answer a question, or if they stuttered or repeated themselves.

After editing, I focused on applying equalizing effects on each voice to increase vocal clarity. As my podcast primarily revolved around interviews and voice-over content, the audio needed to be as pristine as possible. As information accessibility was an important part of my project, I wanted to ensure through my editing that all recorded content was intelligible and could easily be comprehended by the listener.

To remove low-end rumble, a high-pass filter was inserted on each speaker. I inserted a three-band EQ on each speaker and removed frequencies that impeded intelligibility. If a speaker was particularly sibilant, I also inserted a de-esser on their voice to tame the necessary sounds. Once I had achieved the desired sound, I made sure to volume match the interviews by applying additional gain if necessary, so the completed episodes did not vary in audio level.

Voiceovers for the intro and outro of each segment were recorded in my home studio using a Universal Audio Twin audio recording interface and an Electro-Voice RE-20 microphone. I recorded multiple passes of each section and edited the selected audio into a seamless take. Once recordings were completed, I inserted a compressor on each track of audio: the interview participant, my interview recording, as well as my voice-over. Compression settings varied based on the speaker's voice but were generally a slow attack, medium release with a 4:1 ratio. Compression is a tool used to even out the volume in an audio file. All three voice tracks were then sent to a separate audio group, where another compressor was inserted

with similar settings. Dual compression often achieves smoother sounding results than inserting one compressor with more aggressive settings (fast attack, fast release, 8:1 or more ratio).

While it might seem that an individual's position in the industry would affect how comfortable they were with speaking into a microphone, there were some notable surprises. Austra and Chloe Lilac had good vocal techniques. They were both very forthcoming and talkative in their answers and had good vocal technique. While also an artist, Anna was more scattered in her delivery and had a more difficult time maintaining consistent speech volume. As an engineer and musician, Katie was acutely aware of when she stumbled through a question, and frequently re-worded her answers. As former musicians, both Sergio and Chris were very talkative. The only two individuals who had never been musicians, Rebecca and Timur, were visibly less comfortable speaking into a microphone and often repeated "umm", "you know" and other filler words in our conversation.

Mixing & Mastering

Once interview edits and voice-over recording were completed, I began assembling the podcast. Original intro and outro music was commissioned from Katie Lau the Front of House technician and musician, known under her artist's name as "Painted Zeroes". As I am aware of the discrimination and underpayment issues women, particularly women of colour, face in the music industry, it was important for me to both showcase and pay a BIPOC musician for these compositions.

In the first episode, I created a soundscape to immerse the listener in my story. I layered traffic noises with car sounds, as well as radio scans. All sounds were downloaded from the royalty-free website freesound.org. I used the commissioned music under all my voiceovers to elevate the content, while most of the interviews were left dry to prioritize a focus on the speaker. I added music towards the end of each interview to denote the transition towards the next guest.

Once assembled, the episodes were checked for differences in volume and mastered through Izotope's Ozone plug-in to ensure my output mix level was -14LUFS. This is the audio standard for a podcast level on streaming platforms.

Chapter 4: Show Time

The Artists

At the base of the music industry are artists. Without musicians, there can be no music industry: no records, no concerts, no venues, no touring crew, no concert promoters. There exists a wide range of musicians, from emerging artists playing local coffee shops to established artists like the Bad Bunny's and Beyoncé's of the world, playing 50,000 capacity stadiums. While artists could once make substantial incomes from record sales, we now live in the age of music streaming.

Though unthinkable to members of Gen-Z or Alpha, individuals used to have to travel to the record store to purchase physical copies of music albums. While music piracy existed before the invention of the Internet in the form of home-taping and bootlegging, it was the creation of the peer-to-peer pirating website Napster in 1999 that fundamentally changed the entertainment industry. Using Napster, any individual with an internet connection could now download music and movies for free from the comfort of their own home. Rather than try and work alongside early streaming sites, major labels pursued legal action against site creators and individual users (Sinnreich 2013). As peer-to-peer website use grew, record sales in the US steadily declined. This can be demonstrated through data compiled since 1973 by The Recording Industry Association of America (RIAA). In 1999, CD sales peaked in the US; adjusted for current inflation rates, they grossed $23.4 billion USD (RIAA, 2024). In steady decline since, CDs grossed a meagre $537.1M USD in 2023 (RIAA 2024).

Globally, Spotify is the most popular music streaming platform; they have 574 million users internationally, which includes 226 million paid subscribers (Spotify, 2023). They offer both premium accounts (no advertisements, ability to shuffle music and access libraries offline, amongst other features) and free accounts (advertisements, inability to skip more than six songs an hour, no offline music).

Spotify generates revenue through both its subscriptions and the fees it receives from advertisers. They state that nearly 70% of that revenue is paid back as royalties to rights holders, who then pay the artists and songwriters based on agreed terms. These rights holders include record labels, publishers, independent distributors, performance rights organizations, and collecting societies. Spotify does not pay artists or songwriters directly. (Loud & Clear by Spotify, 2023). As agreements vary between artists and labels/distributors, it is difficult to know exactly how much musicians earn per stream. Furthermore, streaming an artist's music does not directly provide them with income. Spotify employs a "big pool" model, which "pools subscriber revenue and weights earnings distributions to the sound recording owners (and their featured performers) who brought in the most streams in the accounting period on a jurisdiction-by-jurisdiction basis". (Castle & Feijóo 2021, 8). This means that the most popular artists on the platform receive a portion of every subscriber's fee, regardless of whether they listened to their music (Zendel 2024b, in press, 16). Due to the high cost of these royalty payments, the streaming giant currently operates at a financial loss (Sismanis 2023). To increase their revenue, Spotify is investing in royalty-free music as well as promoting what have been called fake or ghost artists: musicians composing music under pseudonyms that either receive lower royalty rates or only a flat payment for song composition (Zendel 2024b, in press, 20).

In 2021, *Digital Music News* used the average reported royalty rate on Spotify ($0.00492/stream) and calculated the number of streams a musician would need to reach monthly to be paid minimum wage, which they consider to be 40/hours week. At the time of writing,

minimum wage ranged from $7.25 to $15/hr depending on the state. At a minimum, an artist needed to reach 236,000 streams per month to make this $1200/monthly rate; states with higher wages require upwards of 487,000 streams (King 2021). Since the publication of this article, minimum wages have increased in numerous states, and royalty payments have remained between $0.003 and $0.005 per stream on Spotify.

Instead of working towards fairer streaming rates, the streaming giant implemented changes to their royalty program on April 1st, 2024. Most importantly, songs that have received less than 1000 streams annually will be demonetized, meaning that their creator(s) will receive no payment (Modernizing Our Royalty System, Spotify 2023). Spotify has stated that this policy was enacted to prevent small payments from being "lost" in the system, as labels and distributors require a minimum royalty balance for withdrawals and banks often charge transaction fees (Modernizing Our Royalty System, Spotify 2023). While this is true, this policy creates a precedent for minimum streams required to be active on the platform and moves artists further away from earning a living wage.

In spring 2024, Spotify announced a subscription price hike, as well as the addition of audiobooks to their platform (Robinson 2024). While this increase should translate to higher royalty payments for artists, the company is now arguing that the addition of audiobooks would allow them to pay bundled mechanical royalties in the US (Robinson 2024). Music magazine *Billboard* believes that songwriters "will earn an estimated $150 million less in U.S. mechanical royalties from premium, duo and family plans for the first 12 months that this is in effect, compared to what they would have earned if these three subscriptions were never bundled" (Robinson 2024). As these changes are forthcoming, the impact has yet to be felt. Spotify may look to make mechanical royalty changes in other markets such as Canada. It is important to note that music fans should not be faulted for appreciating the convenience of streaming platforms; it is the companies themselves who should work towards paying musicians fairer rates instead of continuously seeking to increase shareholder profits.

As physical record sales dwindle and streaming laws disfavour musicians, live show income is now the main source of revenue for many musicians. I interviewed two musicians at different stages in their careers for this research. Austra is a 38-year-old songwriter, producer, and composer based in Toronto. Signed to the London, U.K.-based independent label Domino Records, she has been releasing electronic albums since 2011. In May 2020, as the world struggled to acclimatize to the tumultuous times, Austra released a record she had been working on for three years. She states:

> because it was the beginning of the pandemic, it just wasn't a good time to talk about anything other than the pandemic. So, it was really hard to get any press or any PR, people weren't really looking for new music at the time (…). I had to cancel 75 shows that I had booked. (…) But I guess I sort of noticed, when all those shows got cancelled, that my income didn't change as drastically as I thought it would. And it just kind of made me realize that I had spent so long touring, and earning or making money for all these people around me, you know, making money for my band, and for my crew, and for my label, and for my agents, and for my manager, but I wasn't actually keeping anything, I wasn't myself actually making any money from touring so it made me really rethink how valuable touring is to me at all. (Austra 2023, personal communication)

While live event income can be substantial, Austra points out that numerous other players take portions and benefit from an artist's show income. As she has a substantial back catalogue, she

realized her royalty payments were a more lucrative source of income (Austra 2023, personal conversation). She also receives income from producing and songwriting for other projects. The pause in touring created by the pandemic made her realize she wanted to be more selective with booking concerts:

> it's just really expensive to tour. You know, it wasn't as expensive in 2011 when we were all like twenty-five years old and didn't care where we were staying, and we'd just like slam eight people in a minivan and get going. But now that I'm almost 40, I need to sleep eight hours. And I need a comfortable bed. Otherwise, I'm going to lose my voice (…). I need to be very conscious about like how I treat my body on the road, or I just can't physically perform. (Austra 2023, personal communication)

Little to no research has been conducted on the physical and mental effects of long workdays in the music industry; initial work conducted before the pandemic indicated that touring professionals were at higher risk than the general population for suicidality and clinical depression (Newman et al. 2022, 248). For Austra, the impacts of travel, coupled with increasing costs, no longer justify the touring grind. She has focused her time on growing her career as a producer and songwriter, while advocating for reforms in streaming platform payouts to allow musicians to be fairly paid for their work (Austra 2023, personal communication).

Emerging artists face their own challenges in this precarious industry. Chloe Lilac is a 22-year-old artist based in Los Angeles; I met her when she was 16 years old and signed to the major label RCA. During the financial uncertainty of the pandemic, she was released from her label contract. She is now navigating the industry as an independent musician with no label funding, no management, or any formal administrative team beyond a booking agent. Chloe spends her days working service industry jobs to pay her bills, while simultaneously trying to advance her music career. She is actively writing new songs, while hiring session musicians for her shows, creating touring budgets, being active on social media and looking for new opportunities in the industry like songwriting or producer work (Lilac, C. 2023, personal communication).

The financial realities of touring are daunting on any scale, but perhaps even more so when many of your show fees are percentage-based deals or have low guarantees. As Chloe describes it:

> my agent has been trying to book me at Live Nation venues, in places where I know I'm not going to sell many tickets, so that we have a decent guarantee. But I mean that stuff ends up evening out in like two days, like you run through it… Say you get like $1500, that's gone immediately (…). I wish it was cheaper, I wish there was some like cheat code to get cheaper gas if you're a touring band (…) it's hard. Everyone needs to make money. (…) [But] everything's just more and more expensive and people are less inclined to buy merch. (Lilac, C. 2023, personal communication)

Chloe is in the interesting position of being an employer; she hires her session musicians and must pay them for their time. Financial hardships on previous tours had left her in the stressful position of almost being unable to pay her guitarist:

> I can be like a few thousand dollars in the hole, that's fine. Once I'm shorting people, that's where I feel really bad. (…) I want to make sure I'm paying everyone a living wage; I want to make sure that we're able to stay in nice hotels that aren't like riddled with

> bedbugs and we're able to have at least a $20 per diem. You know, like maybe a little more than that would be great. Just like, basic comfort, and having everyone be happy. (Lilac, C. 2023, personal communication)

While Chloe could perform alone, the pressure of wanting to put on a good show for her developing fan base has led her to want to invest in her art and hire musicians to join her on stage. She has a financial responsibility towards these musicians, but does the industry itself not have a responsibility towards performers? Like others I interviewed, she was vocal about her support for the creation of a music industry workers' union that would fight for worker rights, and the need for universal healthcare for musicians (Lilac, C. 2023, personal communication). If numerous label, management, and booking agency employees have access to health benefits, why would these not be extended to musicians? The cruel irony of being a musician in 2024 is that many of these conditions have been normalized, as Chloe points out:

> I think it's just so weird that we don't have more addiction resources in music... that's a huge issue, why are we so used to like fucking Soundcloud rappers dying all the time? Why are we like, oh yeah, that happens. Like no dude, the average lifespan of a musician is 45. What! Is it the fucking 1600s or something? I'm sorry, why is that? Why does everyone accept that? (Lilac, C. 2023, personal communication)

Chloe is a Gen-Z artist; her career has been heavily dependent on her social media interactions. She was signed to a major label after having a song go viral when she was 16 years old. She is very much aware that an artist's social media followings as well as the use of song clips on social media platforms become a quantifiable but controversial way for festivals, booking agents and management to book and promote artists such as herself. She feels like her failure to go viral on TikTok in 2020 was a part of the reason why she was dropped from RCA. (Lilac, C. 2023, personal communication).

As the foundation of the music industry, artists experience first-hand the precarious working conditions. There is a substantial amount of aspirational labour involved in being a musician or producer, from the time spent writing music, to then recording, which involves spending money on things like studio time, mixing and mastering. In 2024, maintaining a social media presence is expected of musicians: many artists create content every day to remain visible on algorithms to their followers, as well as in the hopes of having clips of their music going viral.

Musicians experience creative precarity by not receiving a guaranteed income for their work. It can be difficult to budget your finances, as many factors such as rising inflation costs and problems on tour such as a broken-down vehicle, missed flight or cancelled show can affect your income. As primarily freelancers, musicians do not have access to healthcare or other benefits that are offered to salaried workers at labels or booking agency companies. Artists feel the impact of performing daily; they must remain in good health to put on a good show for their audience. This can be extremely difficult when you are sleeping in uncomfortable hotels and working long hours. A typical day on tour involves driving to a show, loading in, sound checking, performing, loading out and then repeating the process the next day, on limited sleep. Even nutrition is a challenge: finding healthy meals at restaurants can be difficult. Furthermore, as employers, artists have a responsibility to pay session musicians as well as other members of their team, such as booking agents, managers and sound engineers. It certainly happens, as Chloe recounted, to end a tour and realize that after paying everyone else, you are thousands of dollars in debt.

Concert Promotion

When an artist is ready to tour, they reach out to their booking agent(s), commonly referred to as agents. In exchange for a 10% commission on the artist's performance fee, agents will find their clients performance opportunities either as single shows or festivals (also called "one-offs") or by booking them multi-date tours. Most agents specialize in a certain global region, for example North America or Europe, and it is common for artists to work with a few different agents if they tour internationally. An agent's job involves a lot of networking and pitching their clients: it is their relationships with a variety of concert promoters that ultimately get artists on tour. While artists of smaller scale often book and promote their own concerts, working with a booking agent can lead to new career opportunities. Promoters often reach out to agents they trust to inquire about which new acts to book on festivals and to see who is planning tours next year. As an emerging artist, it can be hard to find an agent willing to sign you as a client, as 10% of a $250 opener slot guarantee on a mid-level tour is only a $25 payment for them. This 10% commission does not even go entirely to the agent: they must remit 2-5% of that payment to their agency to cover administrative costs such as assistant salaries, office rents, and supplies. Like other workers in the music industry, agents engage in aspirational labour. They sign clients on the promise that they will develop as acts and be able to get larger show fees, thus increasing their commission revenue. There is substantial money involved in live events, and the market has increased since the pandemic. Industry publication *Pollstar* reports that the total ticketing gross of the top 100 tours in 2019 was $5.549 billion/USD; that number increased to a staggering 9.169 billion/USD in 2023 (Pollstar Staff 2023). Popstar Taylor Swift's "Eras Tour", set to continue in 2024, grossed $1.039.263.762 USD at the box office last year, making it the highest-selling tour of all time (Pollstar Staff 2023).

A booking agency assistant-turned-full-time agent in 2023, Rebecca works at Heavy Trip in Montreal. As a new agent, she spends a considerable amount of her workdays researching performance opportunities and reaching out to promoters and festivals to pitch her growing roster of clients. She does not get a salary for her full-time work hours but instead relies on commissions as her only source of income. As she works with smaller and developing artists, their guarantees are not as high as those of established A-list musicians who have a track record of selling substantial amounts of tickets.

Rebecca explained that inflation has led artists to reconsider how and when they want to tour. Many of her clients have had to reconsider how they want to perform (as solo artists or with backing bands) due to the increased costs of travel and production. She states:

> I'm not particularly an agent that likes to deal in visibility (…). [S]ometimes it's the right move, you get an offer, it's shit money, but it's a really good opportunity, so you make the exception. But I think in my day to day, I've walked away from a lot of things that could have been decent, because they were not financially viable. (Gekht, R. 2023, personal communication)

As performance fees are a main source of income for her clients, she wants to ensure they are adequately compensated for the time and work they put into building a show.

She also remarked that there are significant differences between the American and European music industries:

> In my experience with working with European promoters and American promoters, European promoters have grants. And because they have grants, they can afford to put

> down a viable sum of money for a performance right away. In America, it is not the case. (…) I primarily work in the US, it's quite an important market for developing artists. In the US, there is not much help for the cultural sector in terms of financial aid and grants (…) and because of that, and I understand this, they can't take as much risk, especially after the pandemic. (Gekht, R. 2023, personal communication)

Arts grants obtained through Government of Canada funded programs such as the Canadian Music Fund (CMF) can help alleviate financial risks for artists, promoters and venues. Grant funding helps guarantee that all three parties receive appropriate income and allows shows that feature emerging musicians to be booked with less financial risk. Developing your show as an artist can be a timely process, and every experience to perform should be seen as helping to create tomorrow's future stars. In March 2024, the Canadian Government announced it would invest an additional $32 million into the CMF over the next two fiscal years. While this falls short of the $60 million increase sought by the CLMA, the CMF will fund programs administered through the Foundation Assisting Canadian Talent on Recordings (FACTOR) and MusicAction (Long Decter 2024). These non-profits provide grants to selected Canadian artists, record labels and other music organizations to record albums, fund tours, pay for marketing expenses and produce music videos, amongst other activities.

These investments in culture economically benefit communities. Beyond the joy of seeing live music, studies have shown that live music has a positive financial impact. When patrons go see a concert, they might book a plane ticket or a hotel room if they're travelling from out of town, purchase new items of clothing to wear or go eat in a restaurant before the event. The CLMA conducted a study in 2018-19 on live music in Toronto and concluded that venues in the city generate a total economic impact of $850 million per year, while labour income generated by the operations and tourism impacts totals $514 million annually (Nordicity 2020a, 6). The now legendary "Eras Tour" has significantly boosted local economies: Taylor Swift's two Denver shows were "(…) estimated to contribute $140 million to Colorado's GDP. Recent polling of "Eras" concertgoers indicated they spend an average of $1,327 on all show-related expenses such as tickets, travel, merchandise, lodging, and food. This amounts to more than $200 million in direct consumer spending associated with the Denver concerts" (Anderson & Archuleta, 2023). When the popstar played in Philadelphia in May 2023, the Federal Reserve Bank of Philadelphia reported that it had been the city's strongest month for hotel revenue since the onset of the pandemic, primarily due to her concerts (Federal Reserve Bank of Philadelphia 2023).

Concert promotion is a sector of the music industry that involves more than agents; promoters are the ones who must agree to performance fees and coordinate the production and marketing of live events. Currently, the industry is dominated by two large companies: the publicly traded Live Nation Entertainment, also the owner of the ticketing platform Ticketmaster, and the slightly smaller AEG Presents. The boxscore charts reported to *Billboard* in 2023 demonstrate that Live Nation dominated the market at 5.9 billion USD made at the box office, AEG came in at second place with 2 billion USD, while Montreal's own Evenko, a Live Nation partner, grossed 105.1 million USD (Billboard 2023, 24). By being national and international promoters, these large companies can spread the financial risk of organizing concerts over several different concert dates. It is easier for these large companies to promote concerts when they own the space where they're holding the event because they can set rental costs, staff salaries and other venue expenses. They profit from owning ticketing platforms, as well as the alcohol and other concession sales that happen in their venues. Sometimes, they even take a percentage of artist merchandise sales.

While these big players have a large influence in the industry, there are still numerous independent promoters and venue owners. At the time of our interview, Timur was a Senior Talent Buyer at F7 Entertainment; he is now a Senior Talent Buyer with Modo Live, another Canadian independent promoter. His job consists of putting together show offers for booking agents based on the parameters the agent has set. For example: a $25 ticket price, 400-500 capacity rooms, with $1000 of rental backline costs as a show expense because the artist won't be travelling with their equipment. Taking these guidelines in mind, Timur will add other expenses such as staffing costs, room rental fees, marketing, and hospitality budgets, before making an offer.

There are a variety of different deals in show promotion, but these tend to be the most popular:

- flat fees (where the artist gets one guaranteed sum of money, which is common at festivals or special events that are not ticketed, for example a private party)
- versus deals (the artist is guaranteed a sum of money, but if the ticketing gross is higher after covering all show expenses including the artist guarantee, the artist will get 50% to 90% of the ticketing gross while the promoter retains a 50% to 10% profit. I most often see 85%/artist and 15%/promoter deals)
- and percentage deals (where the artist has no guaranteed income but retains a percentage of the net or gross ticket sales)

Established acts with dedicated fan bases will not accept purely percentage deals, as these tend to favour the promoter. Concert promoters take on risk by offering an act a guaranteed payment – if the show only sells 10 tickets, they still need to pay the artist in full. As Timur points out: "(…) there's usually about a 15 to 30% profitability margin, but you know, you're risking, in some cases, hundreds of thousands of dollars to make back $30,000" (Inceoglu, T., February 2023, personal communication). While most concert promoters are salaried, the financial outcome of a concert affects the company's bottom line. If the company is lucrative, employees might obtain a bonus, while incurring debt will limit their ability to promote further concerts. It is unrealistic to expect every show to be profitable, but a steady income must be maintained for a promoter to grow their company. Promotion is then also routed in the same aspirational labour concept that is pervasive through the music industry; that by taking a chance on an emerging artist, they will choose to continue working with you once they're able to sell a larger number of tickets.

Since 2020, Timur noticed changes in the types of offers agents are looking for:

> first play for an artist in a city like Toronto or Vancouver, before I remember offering a $500 guarantee, and then having the show sell out, and then [the artist] make[s] all their money on the overages. But now, I'm not really seeing a lot of those $500 shows happening anymore. So, I think people are being a bit more cognisant of what they need to be on the road. (Inceoglu, T., February 2023, personal communication)

While higher show offers can alleviate an artist's budget, they can act as a deterrent for smaller promoters; promotion is ultimately a risky business. As Rebecca remarked, the pandemic had a large financial impact on independent promoters, who just might not have the funds to guarantee upfront the sum of money that is viable for an artist to play in their city.

Concert promotion involves working closely with venues. While industry giants such as Live Nation and AEG own numerous venues and increased their holdings during the pandemic (Cross 2023), there are still numerous independent venues. Turbo Haüs is a 150-person capacity venue located in Montreal. It is co-owned by Sergio, who spent much of his twenties and thirties touring internationally in a DIY punk band. He used this ethos to originally start Turbo Haüs in a rehearsal space; it has since moved to the downtown core and is a popular bar and event space. Bands who play Turbo Haüs are offered free accommodations in an apartment above the venue, as well as breakfast from their sister business, a café. Speaking on European versus American DIY touring, Sergio says:

> the difference is like night and day. Like you can go to a squat in Germany, and you'll get fed, you have a place to stay. People will show up the next morning, make you breakfast, and maybe somebody will steal a bunch of diesel so you could put it in your van. Philadelphia, somebody will fucking stab you. Like, that's what you're getting? (Da Silva, S., 2023, personal communication)

While perhaps unfair to the Philadelphia music scene, this comment exemplifies how differently the two continents treat musicians. Sergio knows how difficult small-scale touring can be: he is trying to offer the best possible experience to artists who perform in his space. He extends this vision to his staff, who are hired as employees and have access to a health care plan. This is unfortunately not the norm for venue owners in Canada. I have worked for multiple venues in multiple Canadian cities and was always considered a freelancer.

Being a venue owner comes with challenges: Sergio must cover the rent, any necessary repairs to the audio-visual and bar equipment, and pay his staff and suppliers. While he retains the profits from selling beverages, there are high financial and time commitment costs to running a business. Yet without these small venues, emerging artists will not have the chance to develop a fanbase, and aspiring production staff will not have the opportunity to hone their technical skills. Indeed, my career as a sound engineer started in a 110-person capacity venue much like Turbo Haüs.

Production Staff

Once a tour is booked, there is a whole team of touring professionals who are responsible for handling the production and day-to-day logistics. Depending on the scale of the tour, this can mean upwards of 150 crew members working in an arena or stadium. In venues of that size, artists will travel with their production: this means that every day the sound, lighting, and video systems, as well as musician backline and stage elements must be set up and tested ahead of the performance. It is typical for the load-in process to start early in the morning, at 7am or 8am, and for the load-out to be completed by 2am. While many workers will take care of setting up the technical aspects of the performance, there are also individuals responsible for handling travel and hospitality logistics. As the schedule is tight, the crew will sleep on tour buses that travel through the night, before beginning the load-in process once again.

On smaller venue tours, such as those featuring musicians playing in clubs and theatres, load-in times might vary between 11am and 5pm. Musicians and their crews might travel on tour buses or be driving themselves in vans or personal cars. Touring budgets will dictate how many workers are hired for a tour; is it typical on these smaller operations for individuals to double up on jobs, for example working as both Tour Manager and Front of House sound technician

(TM/FOH). This is my field of expertise; I started off working as a sound technician when I was 22 in a small 150-capacity venue in Ottawa, Canada. The dream of working with touring artists pulled me in, and when I was 25, I embarked on my first US tour as a sound technician. I've since travelled the world as TM/FOH, mixing in small clubs in Belgrade, Serbia and arenas in Nashville, Tennessee. I've had an afternoon to find a new keyboard after the airline lost a rare synthesizer ahead of a performance in front of 25,000 people in Barcelona, Spain, and I've sat in hospital waiting rooms for hours with sick musicians, all in pursuit of getting the show done. I've always felt fortunate to be working in a field I love, but the promise of aspirational labour is what kept me hooked: better opportunities would come if I just worked hard enough.

While some agents, concert promoters and venue staff might be employees and have access to benefits, both production staff and artists are typically self-employed. I was always considered a contractor when I worked as a sound technician for venues in both Ottawa and Toronto. When I moved to Los Angeles in early 2020, I was hired by a Live Nation venue; in this case, I was paid as an employee and could buy into health benefits not because the company cared about my well-being, but because California employment laws mandated it (State of California, "Independent Contractor Versus Employee"). As state and provincial laws vary, many of my peers working in venues or as touring crew were unable to access employment insurance when the pandemic forced the cancellation of all live events. A fellow sound engineer and indie musician from New York City, Katie Lau, recounts:

> Working in the music industry has always been a precarious form of labour, it is largely in the realm of the gig economy. It's very rare to have salaried jobs in music (…) and, again, this is reflective of the world we live in at large. (…) The pipeline in the past of going to college, securing a degree, getting a salary job with stable benefits and health insurance, that isn't the reality for the majority of people in America at least. But America isn't unique in this way. And the pandemic really highlighted just how devastating it is to not have any kind of safety net. I think it made me aware of how expendable people in our roles are seen. Both as artists and as the people who put on live shows and entertainment. Not to say that there weren't mobilization efforts, and not to say that there weren't groups like MusiCares and the Union of Musicians and Allied Workers (UMAW) organizing relief efforts, but there wasn't support from a broader social or governmental scale. (Lau, K. 2023, personal communication)

To sustain herself during the pandemic, Katie pursued work in the podcast editing field. She now splits her time between studio work and live sound, and has decided she will not be returning to live events full-time:

> I think, like any person who has been working primarily in the gig economy for most of their adult life, I am reluctant to fully divest from either potential stream of income because both have showed me in the last four years how, how insecure the work itself can be. And I feel that I need to be able to adapt and take whatever work I can basically, depending on which realm is suffering less. But I really don't see a world in which I transition full time to live sound ever again. I mean, it's very hard on the body too. (Lau, K. 2023, personal communication)

While working in live events seems glamorous, the physical impact of the long workdays takes a toll. Zendel refers to touring as a process of dressage, where daily life needs such as eating and sleeping are subdued to play a show (Zendel 2024, 71). He states:

> Tours are planned first around the availability and profitability of shows, and then around the travel time to and from venues. Planning a tour requires reconciling the business case with the physical limitations of the workers. This reconciliation entails dressage to discipline working bodies to the business case. (Zendel 2024, 71)

As demonstrated by Austra and Chloe, the price of going on tour is high: an artist must book travel, rent equipment, print merchandise, and pay salaries, amongst other expenses. To recoup these costs, artists will often limit the number of days off or make impossibly long drives to gain show income. I have been on month-long van tours with no formal days off – any day without a show constituted of driving a minimum of nine hours, not accounting for any stops made for bathroom breaks, fuel, or food. Routing is not always logical, as there are no guarantees that a booking agent can book shows in neighbouring cities back-to-back. It is common to backtrack on tours; yet there is nothing restful about being in a moving vehicle, and these travel days often leave you feeling more tired than playing a show. While bus tours might seem preferable, the ability to travel at night means that artists can do a higher number of concerts in a row. I had a peer do nine shows back-to-back on a bus tour in winter 2024. The sheer exhaustion felt by artists and crew on day nine can be detrimental to the performance, as well as potentially dangerous if accidents happen while driving or handling heavy equipment. Yet, these schedules are normalized in an industry where profit margins are thin and the idea of a paid day off is seen as impeding the financial bottom line.

Production staff don't dream of working days that stretch from 16 to 20 hours. We yearn to one day get the elusive "retainer" gig where an artist has a substantial enough income to pay us a weekly salary regardless of whether we are touring, of not having to find other tours to supplement our income, of a show schedule that allows for days off while still being profitable for the artist. Aspirational labour is what keeps crews working hard; that perfect job is just around the corner.

While the music industry was precarious before the pandemic, the return of concerts was met with both inflation, supply chain issues and the loss of touring crew, which impacted music economics further. Chris Paules, a Tour Manager from Los Angeles, recounts:

> I'm having to field more vendors; I'm having a harder time staffing tours. (…) The supply chain just really messed up buses. So, there are fewer available, and they're much more expensive now than they have been traditionally. (…) I just did a three-bus tour. And we had seven buses throughout the tour, because they kept breaking down. Stuff that used to take a day to fix, takes two weeks to three weeks to fix now. (…) Now when a bus just blows the transmission for no reason, and you're struck in the middle of Utah, like okay, what do we do now? Oh, there's not another bus. Guess we're in a van. Oh, there's no vans. Okay, guess we're flying. Now the tour's losing money. (Paules, C. 2023, personal communication)

Numerous musicians have been vocal about their inability to tour due to these rising costs (Aswad 2022, Pemberton 2022, Snapes 2022). If artist payments don't rise to meet inflation, touring will become impossible for individuals who don't have access to wealth or support from

their music label. While these advances were larger and more common in the 1990s, the golden age of physical record sales, many artists on major labels today still receive what is called touring support. These are funds advanced to purchase equipment, pay crew and session musician salaries, book hotels and other touring necessities. It is important to note that this money is not a grant; the label hopes to recoup the advance through an artist's royalty payments.

As an indie musician herself, Katie the sound technician is aware of the capital needed to go on tour:

> So many artists that I know and love have been forced to cancel their tours recently because they simply can't afford it. It's not profitable, unless, as you said, you have that major label or that access to money, to be able to put down $50,000, to plan your tour and to get everything in place. Many artists don't have access to that. And so, they can't even pursue touring anymore. And I think small music scenes and communities will never stop cropping up, in a DIY sense. However, for emerging and up-and-coming artists who are making interesting work, it will be a lot harder for them to tour in the same way that you know, perhaps a Taylor Swift or a Harry Styles can. And so, the opportunity for the typical consumer to see artists that they love, the pool of things that they can see, will just grow smaller (Lau, K. 2023, personal communication)

Many individuals I interviewed thought that as inflation continues to increase, regional touring and smaller-scale productions would become more prevalent in the industry (Austra, Da Silva, S., Lilac, C, Lau, K., Ruddick, A. 2023, personal communication). By cutting travel costs and minimizing equipment needed, musicians might then be able to have profitable tours. While the current state of the music industry might seem bleak, there are numerous organizations and individuals in North America actively trying to improve the precarious working conditions.

Music Non-Profits & Initiatives for Change

The forced cancellation of all live event work caused by the pandemic led many workers to reconsider their employment environment. Anna Ruddick, a session musician from Toronto, was looking for a career that didn't involve being away from her children for extended periods (Ruddick, A. 2023, personal communication). During the pandemic, she completed an Arts Administration degree, and at the time of our interview, was employed as the Artist Liaison at the Unison Fund. Though this non-profit existed before the COVID pandemic, few individuals knew of their mission of providing "(…) counselling and emergency relief services to the Canadian music community" (Unison 2022, Mission) until they were selected by Heritage Canada to administer a portion of the 60 million dollars allocated to the "Canada Performing Arts Workers Resilience Fund", a one-time payment of $2500 to qualifying music industry workers (Government of Canada 2022, Heritage Canada Press Release). While Unison was not the only arts organization in Canada administering this fund, over 7000 eligible recipients received this one-time payment of $2500 through their 2022 program (Ruddick, A. 2023, personal communication). Though Anna was let go from her position in 2023 as Unison downsized its staff, they are still providing music workers with access to funds for health or living cost emergencies, counselling services, financial support for seniors in the industry as well grocery gift cards (Unison 2024, Services). As discussed above, Canadian arts workers are primarily employed as contractors, many working on short-term contracts. Because of this factor, it can be

difficult to budget for medical expenses or pay for therapy appointments, let alone save for retirement.

In the US, the National Independent Venue Association (NIVA) formed in the early days of the pandemic to lobby the government for aid. Without concert revenue or the corporate backing of large corporations such as Live Nation or AEG, small venue owners struggled to pay their operating costs such as rent, insurance and salaries. Through NIVA's advocacy, the "Shuttered Venue Operators Grant" was passed in Congress in December 2020 (NIVA 2024, History). In total, 16.25 billion was granted to independent entertainment providers such as concert venues, movie theatres and museums, making this bill the largest investment in the arts in American history (NIVA 2024, History). Though there are limited public funds allocated to the arts in the US, this injection of capital is what allowed numerous small venues to weather pandemic closures.

Similarly to Unison in Canada, non-profits in the US such as The Roadie Clinic and Backline Care offer individuals access to therapy, health care plans, legal services, and other forms of family support. As the American government does not offer health insurance to its citizens except for in cases of low income, it can be difficult for self-employed workers to obtain care. Access to quality healthcare is a key demand of American music workers, as demonstrated by both Chloe's (Lilac, C. 2023, personal communication) and Katie's interviews (Lau, K. 2023, personal communication).

Perhaps the most interesting advocacy work in the music industry right now is being led by the grassroots group UMAW, which formed at the beginning of the pandemic. In 2022, they launched a campaign asking venues to stop taking a percentage from artist merchandise sales; as of writing, 176 venues in North America had pledged to stop taking a merch cut (UMAW 2024, #mymerch). In 2024, they helped introduce The Living Wage for Musicians Act, sponsored by Congresswoman Rashida Tlaib and Congressman Jamaal Bowman (UMAW 2024, Make Streaming Pay). This bill would increase payouts to 0.01 per stream for each artist by mandating an increase in subscription fees while setting a royalty cap on songs that receive more than 1 million plays per month; any additional income gained on these highly streamed songs would be divided amongst all artists on the platform (Knopper 2024).

The growing public awareness about issues facing music workers, due in part to efforts by groups such as UMAW, has forced industry giants such as Live Nation to address key complaints about rising touring costs and loss of revenue. This can be exemplified by the growing pushback against merchandise cuts. Unbeknownst to fans, many venues and promoters enforce merchandise cuts, where per contract they are entitled to collect 10% to 30% of the gross of merchandising items[2] an artist sold during a concert. As public backlash increased, Live Nation launched the On The Road Again (OTRA) program. OTRA gives artists playing selected venues in the US and Canada an additional $1500[3] per show as payment and removes the merchandise commission from the performance contract. Additionally, Live Nation increased crew wages at select venues to a minimum of $20 per hour (Live Nation 2023, On The Road Again). According to the multi-national company, OTRA has distributed tens of millions of dollars to over 4000 artists and has been extended through 2024 (Dalugdud 2024). Though this program has

[2] Merchandising items can include cloth items like t-shirts and sweatshirts, physical albums, and other trinkets such as stickers, notebooks, etc.

[3] Initially this was given to artists as $750 in cash and $750 in Shell gas station gift cards, but certain venues in Spring 2024 were handing out $1500 in cash. While gas cards are useful to bands in vans, they are more difficult to spend for artists travelling in buses. Cash allows an artist to pay other touring costs such as hotels, salaries and equipment rentals.

undoubtedly been beneficial, it is important to note that it only applies to artists playing a small selection of Live Nation venues. As the industry leader in concert promotion, Live Nation could have opted to implement this program at all their concerts.

Unionization seems to be a growing idea within the industry. In late 2023, the hospitality workers of First Ave Productions voted to unionize (Lindert 2023). First Ave is a legendary independent promotion company that operates seven venues in the Minneapolis and St. Paul areas in Minnesota. They were instrumental in the formation of NIVA and the subsequent passing of the Shuttered Venue Operators Grant in the American Congress. Yet their hospitality workers, which include bartenders, ticket collectors and floor managers, sought unionization primarily to return to their pre-pandemic level wages. When live events returned, the company demoted all their workers to $15/hour (Timar-Wilcox 2023). First Ave voluntarily recognized the formation of this (Lindert 2023). As of writing, back-of-house staff at the company, such as technicians and stagehands, had not unionized.

When asked what changes they wanted to see in the music industry, my interview subjects had a variety of answers, many of which revolved around the creation of a union that would help facilitate better working conditions. For Katie:

> The efforts of groups like UMAW to create social structures, and policy changes that benefit individuals and artists who are working on a smaller scale are important. Because if you look at the film industry, that's an example of a creative field that has done a really great job of making sure that both its creative artists, and the people who work within the field, are typically unionized. I think having a union to collectively bargain for basic worker rights, like salaries and health care, bargaining for more favourable payout structures in the realms of streaming, and being able to bargain with booking companies and venues for favourable pay structures, I think, would be really useful in making the music industry a more sustainable, humane place to work (Lau, K. 2023, personal communication)

Similarly, Chloe thought that a union would allow for better access to health care in America (Lilac, C. 2023, personal communication). Meanwhile, for Chris, establishing minimum union rates would create both wage transparency and opportunities for salary growth for crew members (Paules, C. 2023, personal communication).

In line with this sentiment, Rebecca believes that increasing artist fees is crucial to the industry's stability. She added that "(…) if there was a bit more government funding, then [promoters] would have more room to take a bit more risk, to put a bit more down and not have the fear of losing money." (Gekht, R. 2023, personal communication). For Sergio, increasing overall ticket pricing to ensure more money reaches artists directly was important. He also wanted ticket reseller websites to be limited and more transparent about where additional ticketing fees, such as convenience fees were going. (Da Silva, S. 2023, personal communication).

For Austra, streaming royalty payments must catch up with the times:

> we're basing it off copyright laws that came into play in the last century. Streaming does not pay a neighbouring rights royalty at all, which is what I was talking about earlier as one of my main sources of income. And, you know, that sucks for me, but it especially sucks for artists like jazz musicians, who are often not playing their own music, or any musicians playing traditional music, gospel music, religious music, folk music, classical music, all these genres that are based in traditional songs or compositions. There are

> classical pianists who have been playing their entire lives and who went to Juilliard, and who put out a record and make zero on streaming because there's no performance royalty. To me, that is a huge issue. And that is something that I think has the potential to change, maybe not soon, but it's on the radar of policymakers and it has already changed in a bunch of countries in the EU. (Austra 2023, personal communication)

For others, diversity in the industry was a key issue. Chloe mentions:

> I wish women had more respect off-rip. I feel like as a woman you have to prove yourself way more than any man would ever have to, like you have to be really about your business and you have to be really on point all the time, and if you're not on point, people are just not going to take you seriously and it's exhausting. So, I wish that was less of a thing, but I think that's true in any industry unfortunately because of misogyny. (Lilac, C. 2023, personal communication).

Echoing this sentiment, Timur states:

> There's a profound shift that needs to happen. (…) Being a first-generation Canadian from an immigrant family, and not seeing people from my culture being on stage or amplified, even in Canada, you know, I just never understood. Representation matters. (…) I think the industry is starting to really understand that and really embrace diversity in programming. It's a very male-dominated industry, especially in the senior management roles. And to that point, it's also a very-white leaning industry. And so, there's things we need to do to empower and ensure that BIPOC and LGBTQ folks feel part of the conversation, being proactive instead of reactive. (Inceoglu, T. 2023, personal communication)

In contrast, Anna thought that these changes were already visible through increased access to grants for equity-seeking groups as well as increased diversity in the Juno nominations, Canada's annual music prize (Ruddick, A. 2023, personal communication). Though my research did not focus on the impact of grants on live music, it is important to mention that access to state funds does benefit artists and other industry workers. As Rebecca stated, Canadian and European promoters can use arts funding they receive to increase artist payments or pay for venue rentals, thus alleviating the financial stress of promotion while ensuring workers receive a fair wage for their performances. Higher artist fees also have a ripple effect: they increase agent commissions, fund the employment of production staff and session musicians and cover show expenses such as venue rents and travel.

Chapter 5: Load Out

Throughout this thesis, I sought to answer two questions, namely

- how is the live music industry a site of precarious labour
- how do workers, specifically women and BIPOC individuals navigate this precarity?

My research-creation process was based on interviews with 8 participants – 5 women and 3 men working in different sectors of the business – as well as my own experiences as a sound technician and tour manager. These findings were assembled into 2 podcast episodes, with working scripts created for 2 future episodes. The podcast form was selected to create a dialogue between researcher and participant, as well as to make the information easily accessible to non-academic audiences.

The return of concerts post-pandemic exposed significant flaws in the live music industry. These issues can be understood through two key theories: Brooke Erin Duffy's concept of "aspirational labour" (2015) and the idea of creative precarity developed by Hesmondhalgh (2018), Ross (2008), and Curtin & Sanson (2016). Duffy's notion of aspirational labour is crucial for understanding why many in the music industry continue to work long hours in uncertain conditions. Artists spend hours honing their craft and writing music while perfecting their live concerts. In this social media age, they also maintain a presence online; for smaller artists without social media managers, this requires a substantial time investment. They receive no baseline salary, but depending on where they live, might have access to state funding to pursue their art. Aspirational labour also drives concert promoters, booking agents, venue owners, and production staff. They work with emerging artists for lower pay in hopes of obtaining more lucrative opportunities once an act has become established.

Much labour in the music industry is also unpaid, from networking and talent scouting to attending conferences and maintaining a social media presence. Creative precarity is a major factor in the industry's current working conditions; workers lack benefits or stable employment. Despite industry efforts to promote diversity, current initiatives fail to increase access to senior roles. Booking agents, venue owners and production staff have uncertain incomes, which makes budgeting for their day-to-day expenses difficult. All sectors work long, atypical hours, which has a direct impact on their ability to maintain relationships with friends and family. Agents must maintain relationships with promoters across the country; promoters must be in good standing with a venue to be able to rent their space. Venue owners must work with new event organizers to expand their opportunities to receive rental and food and beverage income, and production staff are always seeking to expand their professional networks to receive more short-term contracts.

This thesis fills a gap in music studies; while there exists literature exploring the impact of streaming, there is limited research on touring (Zendel 2024a, Kielich 2021). Current studies do not adequately address the impacts of gender and race on employment in the music industry. Further research should then be conducted on the pervasiveness of sexism and racism within the industry, particularly in upper management settings and in hiring practices. I also explored COVID-19's impact on touring. As interviews were conducted in 2023, they offer a portrait in time of the return of concerts and industry workers. The 8 individuals I interviewed were all still actively working in the field; further research should examine individuals who changed careers during the pandemic. Furthermore, the music industry is always in flux. In May 2024, the American Department of Justice filed an antitrust lawsuit against Live Nation and its subsidiary,

Ticketmaster. The government alleges that their 2010 merger allows Live Nation Entertainment to have a monopoly over the live music industry. This court case could have a substantial impact on touring.

While the gig economy might have its origins within the music industry, it is endemic to general labour conditions in 2024. Long-term employment and benefits are increasingly rare, and a vast majority of workers rely on multiple part-time jobs or short-term contracts to make ends meet. The pandemic-induced pause on live events has prompted many music workers to reconsider fair treatment, leading to organized efforts to challenge these conditions. Activist groups such as UMAW and non-profits like Unison, Backline and The Roadie Clinic are working to disrupt the current state of the industry by leading campaigns to increase streaming revenue, removing merch cuts from live events and facilitating access to health care, therapy and retirement income. Though the appeal of unionization is growing in 2024, as demonstrated through my interviews, very few music industry workers are union members. This is in high contrast with the film and television sector, which has been unionized, much to the benefit of actors, writers, and production staff, since its very beginnings. Additional research is needed on the reasons for this discrepancy. As current streaming and royalty payment laws have disrupted the music industry, live performances and touring income have become increasingly important for musicians and other music labourers such as production staff, booking agents and venue owners. As working conditions in live events are precarious, structural changes are needed to protect workers' rights. Unionization - a concept that in our current gig economy has become a toxified and distorted idea - might be the direction needed to protect an entire labour sector at risk of erasure.

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