



 *Ottawa*



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Introduction

The purpose of this report is to help the City of Ottawa better understand the music climate in the City's rural wards. At the time of this research was conducted rural Ottawa consisted of four wards: West Carleton March, Cumberland, Osgoode and Rideau-Goulbourn. To achieve this goal, a literature review, data analysis and interviews are completed. All data presented is a combined average for all rural residents to reduce the risk that individuals within the data set may be identifiable.

The original plan for the study was to conduct interviews with rural venue owners, followed by focus groups with residents of the rural wards who participate in music in any role. Unfortunately, it was difficult to recruit residents of rural wards to participate in focus groups, so interviews with individuals involved in music in rural communities were conducted instead. Additionally, the venue owners interviewed have venues that are located in the Ottawa area but not within the city boundaries. This is because there is only one dedicated music venue within Ottawa's rural wards, and they were not available for interview during the period of this research.

In total, seven interviews were conducted virtually in March and April 2022. Respondents could participate by filling in a questionnaire, having a phone conversation or using Microsoft Teams. These options were provided to limit barriers to participation. The small number of interviews means that this work is preliminary and not generalizable to the entire population of Ottawa's rural wards. Rather, this paper acts as a starting point that future work can build on to grow understanding of music in the rural wards of Ottawa.

Rural Demographics

Figure 1: Rural Population by Visible Minority Status



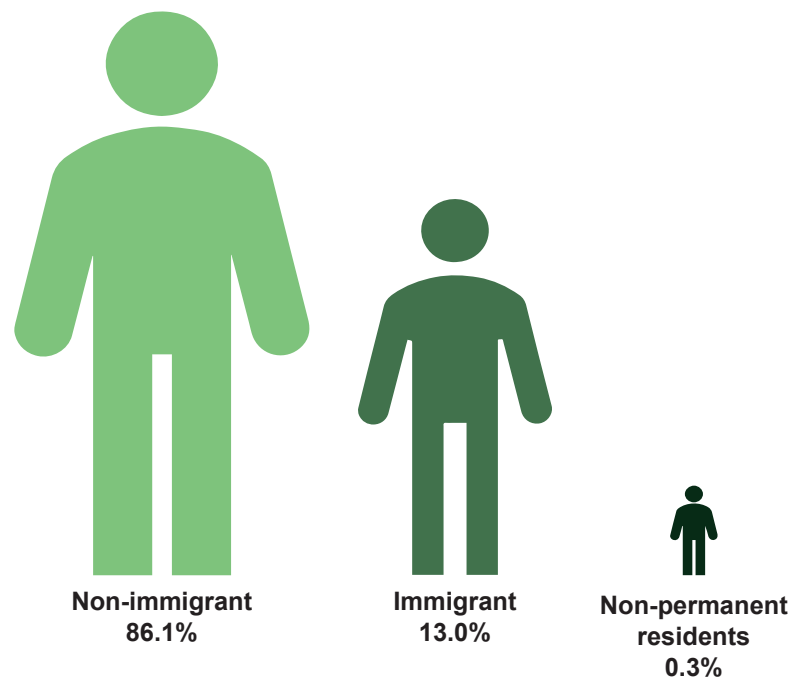
As can be seen in Figures 1 and 2, the population in the rural wards is very homogenous. Very few members of rural communities identify as visible minorities or immigrants,¹ the latter group tending to settle primarily in Ottawa’s urban or suburban neighborhoods. Additionally, immigrants are not choosing to move to rural areas even after living in Canada for a period of time.

This suggests that residents of rural wards have a higher degree of cultural homogeneity with shared cultural norms. Having a homogenous population may also mean that a consistent type of event is preferred and may reduce barriers such as language. While there may still be a French/English disconnect, this is easier to mitigate than in cases where multiple nonofficial languages are prominent. This is shown by the 86.1% of rural residents who are non-immigrants and the 87.5% who

¹ The 2016 census defines immigrants as “a person who is, or who have ever been, a landed immigrant or permanent resident. Such a person has been granted the right to live in Canada permanently by immigration authorities. Immigrants who have obtained Canadian citizenship by naturalization are included in this group.” (Statistics Canada, 2016).

do not identify as a visible minority (Catalogue no. 98-400-X2016366 and 98-400-X2016203, Statistics Canada, Custom Ward-Level Data purchased through Statistics Canada by the City of Ottawa).

Figure 2: Rural Population by Immigration Status



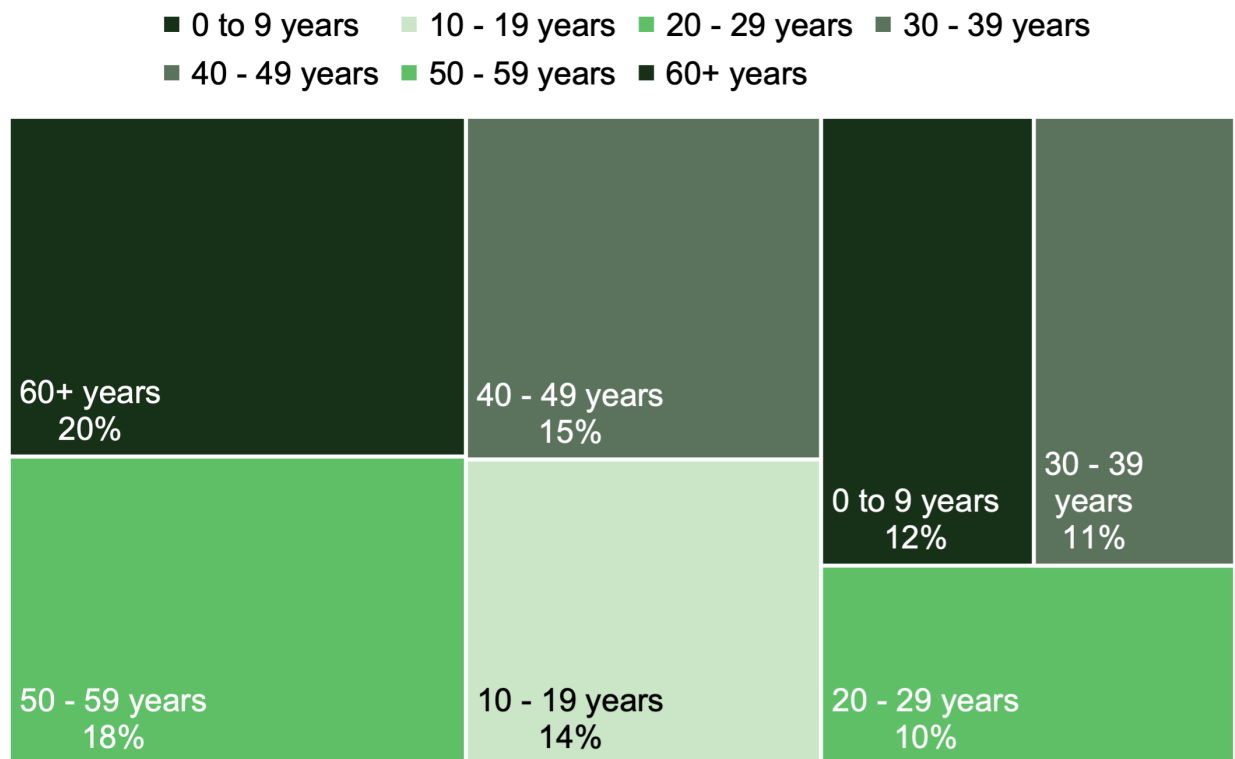
Young people leaving rural areas as they enter adulthood is a large issue in various rural areas (Bennet et al., 2020). In Prince Edward County Ontario, about a three-hour drive from Ottawa, this is due to the low number of available jobs, which cannot sustain the number of students graduating in the community each year (Hrac, 2005). Rural Ottawa is no exception to the aging population phenomenon, as can be seen in Figure 3.

This suggests that the main rural audience likely has some discretionary income as they are well into their career and nearing (or already in) retirement. Additionally, it is likely that this older population has an established idea of what types of shows they are willing to attend. While aging populations are more likely to have discretionary income, they may face mobility or health barriers that prevent them from participating in music events. Moreover, it suggests that the size of the community will gradually become smaller, decreasing demand for music in the local area.

Despite the aging population that is present in the demographics, some interviewees comment that the populations of their communities are growing and, therefore, deserving of more resources. The aging population could be offset by a migration of younger families from urban Ottawa to rural Ottawa. This may occur due to housing prices, desire for increased space and changed work habits due to the pandemic. Further research could examine migration patterns within Ottawa and other cities to see if this phenomenon is likely to occur.

The single largest age group in the rural wards is those 60 plus (20%), closely followed by 50 – 59-year-olds (18%) and 40 – 49-year-olds (15%). The younger age groups are less prominent with teenagers (10 – 19-years-old) making up 14%, children (0 – 9-years-old) accounting for 12% and young adults (20 – 29-years-old) contributing 10%. The final 11% is found in the 30 – 39-year-old category (Catalogue no. 98-400-X2016001, Statistics Canada, Custom Ward-Level Data purchased through Statistics Canada by the City of Ottawa).

Figure 3: Rural Population by Age



There is an existing demand for music in rural Ottawa. There are 1,810 rural residents with education in visual and performing arts, 1,650 who are employed in information and cultural industries and 1,440 employed in arts, entertainment, and recreation (Catalogue no. 98-400-X2016254, Statistics Canada, Custom Ward-Level Data purchased through Statistics Canada by the City of Ottawa).

There may be some overlap between these groups as the data does not differentiate current students and previous students. However, it is important to consider both as some students may not work in the field and some workers may not have attained an education in the visual and performing arts. It seems fair to assume that these individuals would have strong demand for music both in rural and urban Ottawa. This demand will also include individuals who are not working or receiving education in the sector who either participate informally as volunteers or just enjoy being in the audience.

While this group of people is relatively small, there is still an existing demand for music in rural Ottawa. However, these potential participants are more geographically dispersed than in the dense urban core. One challenge identified by venue owners was the lack of passersby who see the sign and wander in or look it up later.

Interviewees noted that population of rural areas can be very seasonal. One interviewee said that in the winter they get 1,500 cars a day passing their venue and 6,000 cars a day in the summer. This means that the demographics discussed above may not be constant throughout the whole year as the census considers primary place of residence.

Audience Demographics



Audience enjoys outdoor concert in summer 2021 © Ashley Owen, 2021

When it comes to the audience, venue owners report a 50/50 split between local and non-local audience members. Local audience members are referred to as a “strong contingent” and are loyal, often coming to all shows and bringing their friends. However, it is also noteworthy that the type of performance can have an impact on both local and non-local audience members. Some communities will only participate in events that correspond with certain genres. Genre can also drive the age of the audience, with young people typically preferring rock and older generations preferring folk. For non-local residents, the performer can determine how long they are willing to travel to see a show.

Some venue owners suggest that the “staycation” mentality brought on by COVID-19 has increased the number of non-local audience members. Distance travelled for non-local audience members can be far, with individuals travelling from Toronto, Pembroke, Petawawa and even New Jersey (pre-pandemic). Venue owners believe that the intimacy of smaller venues drives people to travel such long distances, as rural events provide “intimate performances” that “give goosebumps every time” (edited for clarity). The consensus is that access to small venues removes some of the distance (both physically and metaphorically) that typically exists between performers and audience members. This makes it feel “like the artist is in your living room.” The benefits of such a show and the strong local audience make word of mouth a powerful marketing tool. Additionally, small venues attract the “right acts and the right audience” which allows everyone to maximize their enjoyment. This atmosphere also attracts big name artists which adds to the attraction of the intimate venue.

Mobility

At least a portion of the audiences at rural venues are willing to travel to experience shows. However, the literature and the interviews suggest that there is still a group of people who do not travel to experience music. There could be multiple reasons for this. Music scenes in rural areas are sometimes thought of as more exclusive by non-locals as they require a higher investment of both time and money to participate in (Thompson, 2020).

Other barriers include hazardous roads and need for a personal vehicle (Gibson and Gordon, 2018). Additionally, many shows are held at bars and require a designated driver to get home safely. Gibson and Gordon found that when this is the case some audience members just stay home (2018). These concerns were echoed by venue owners who identify the need to drive personal vehicles on dark, unlit roads to be a substantial barrier. The need for designated drivers is also noted as a challenge by rural venue owners.

Additionally, lack of transit is seen as a barrier for both audience members and potential music sector employees. One interviewee notes that the lack of transit is “kind of discriminatory because only people who have cars or the money for an Uber can come to rural Ottawa” (edited for clarity). This difficulty seems to be mostly associated with people traveling from the city center to the rural wards.

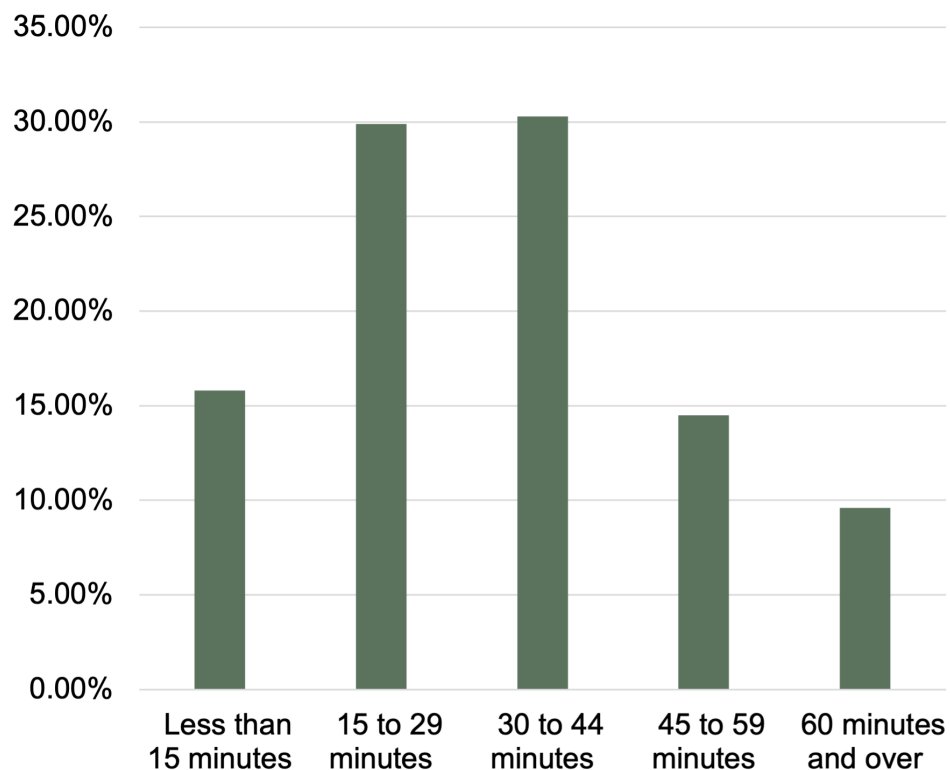
Consequently, bus programs to bring rural residents into the city in the morning and back in the evening, which exist in some rural wards, do not alleviate the challenge to rural businesses.

Members of Ottawa’s rural wards appear to be mobile. A majority of Ottawa’s residents commute for more than 15 minutes to their jobs (Catalogue no. 98-400-X2016328, Statistics Canada, Custom Ward-Level Data purchased through Statistics Canada by the City of Ottawa). This suggests that a small group of residents remain in their wards to work while others travel into the city.

This is important as it shows that large groups of the population can, and more importantly do, travel into suburban or urban Ottawa on a regular basis.

Moreover, rural residents are primarily using private vehicles, as shown in Figure 6 (Catalogue no. 98-400-X2016329, Statistics Canada, Custom Ward-Level Data purchased through Statistics Canada by the City of Ottawa). This increases the mobility of rural residents as they can travel without being limited by transit routes and schedules. Consequently, it appears that mobility into the city may not be stopping rural residents from travelling into the city to participate in urban music scenes.

Figure 4: Rural Commute Duration



Despite this mobility, multiple rural interviewees indicate that they are more likely to stay in their rural ward when participating in music. What is notable is that there does not seem to be a structural reason for this, rather a personal preference to participate in their rural ward. From an artist's point of view, it is suggested that where you are from can determine your pre-existing connections which influence where you get asked to perform.

The same interviewee acknowledged that they may travel up to an hour and a half to participate in music, all in rural communities. The same connection theory may be true for audience members.

An additional explanation is the aging population. Rural residents who have retired do not have commute times and, therefore, are not included in this data. This is potentially a very large group of rural residents who may face more mobility barriers than the data suggests. More work could be done in this area to determine the mobility of retired rural residents.

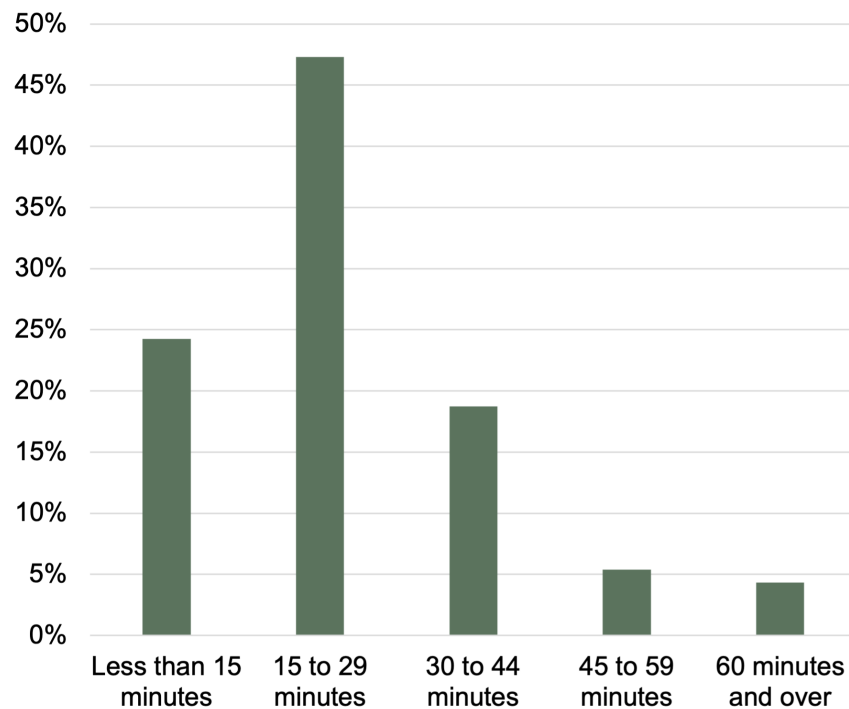
A challenge with performing in the city center is having limited space to load equipment and being forced to park far away from the venue. This is typically thought to be a part of the package that cannot be changed, according to interviewees. However, it could be contributing to musicians' desire to stay in their rural ward. For the few rural residents that do travel into the city core, the National Arts Centre (NAC) is a large draw, both for adult and children's programming. Additionally, the lack of shows and varying artists in rural areas was mentioned.

To provide more context to rural ward commutes, the average commute time across three urban wards (Somerset, Kitchissippi and Rideau-Vanier) is considered. Close to half of commuters in these wards commute between 15 and 29 minutes and a very small percent travel for 30 minutes or more (Catalogue no. 98-400-X2016328, Statistics



Violinist in Sweater © Clem Onojeghuo, 2016

Figure 5: Urban Commute Duration



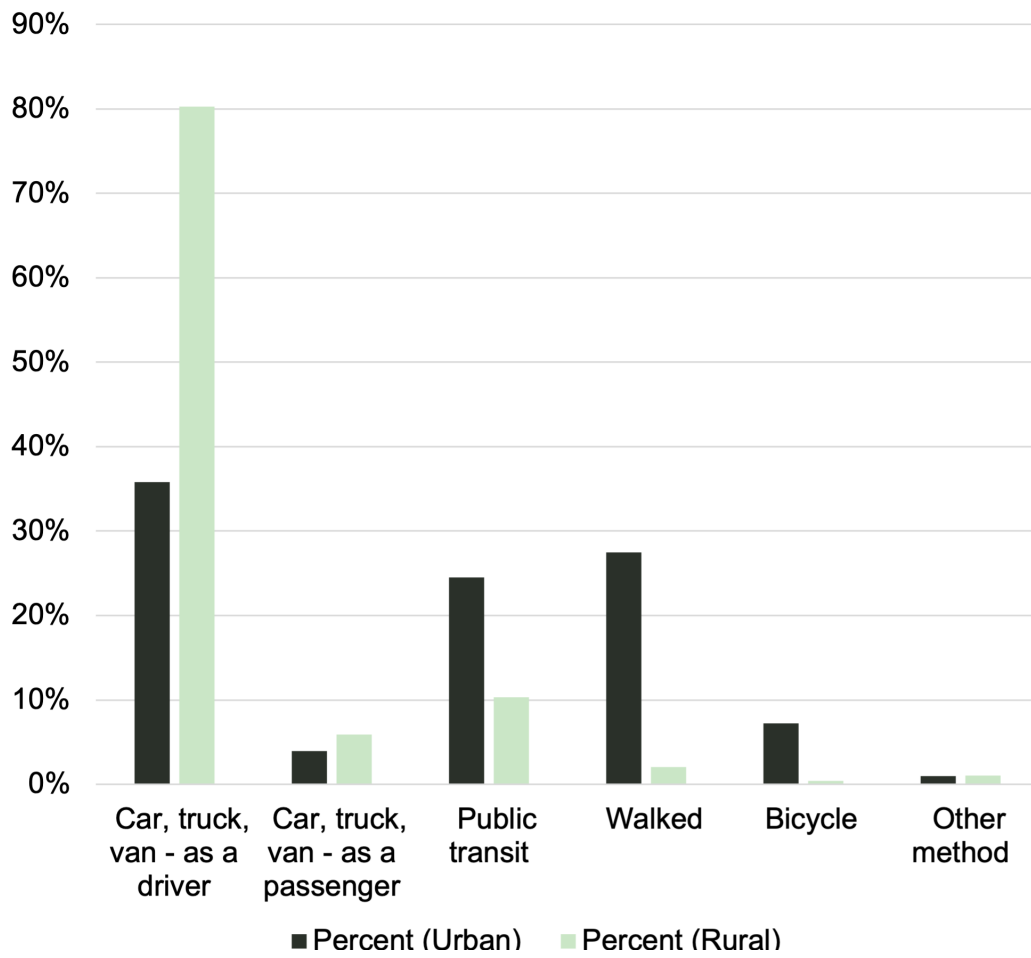
Canada, Custom Ward-Level Data purchased through Statistics Canada by the City of Ottawa). This suggests that urban commuters are located closer to their place of work than those in rural wards and invest less time in travelling for work.

The norm of not travelling far distances may impact urban residents' decisions to participate in rural music. Additionally, urban residents appear to be much more reliant on public transit and walking than those in rural wards, as seen in Figure 6 (Catalogue no. 98-400-X2016329, Statistics Canada, Custom Ward-Level Data purchased through Statistics Canada by the City of Ottawa).

This may limit their ability to travel to rural wards, even if they would be interested in doing so.

COVID-19 has caused a huge shift in how we work and travel. Consequently, it is possible that commute duration has changed dramatically since the 2016 census. Re-examining this data when more recent information is available will create a clearer picture of travel habits.

Figure 6: Transportation Method to Work, Urban/Rural Split



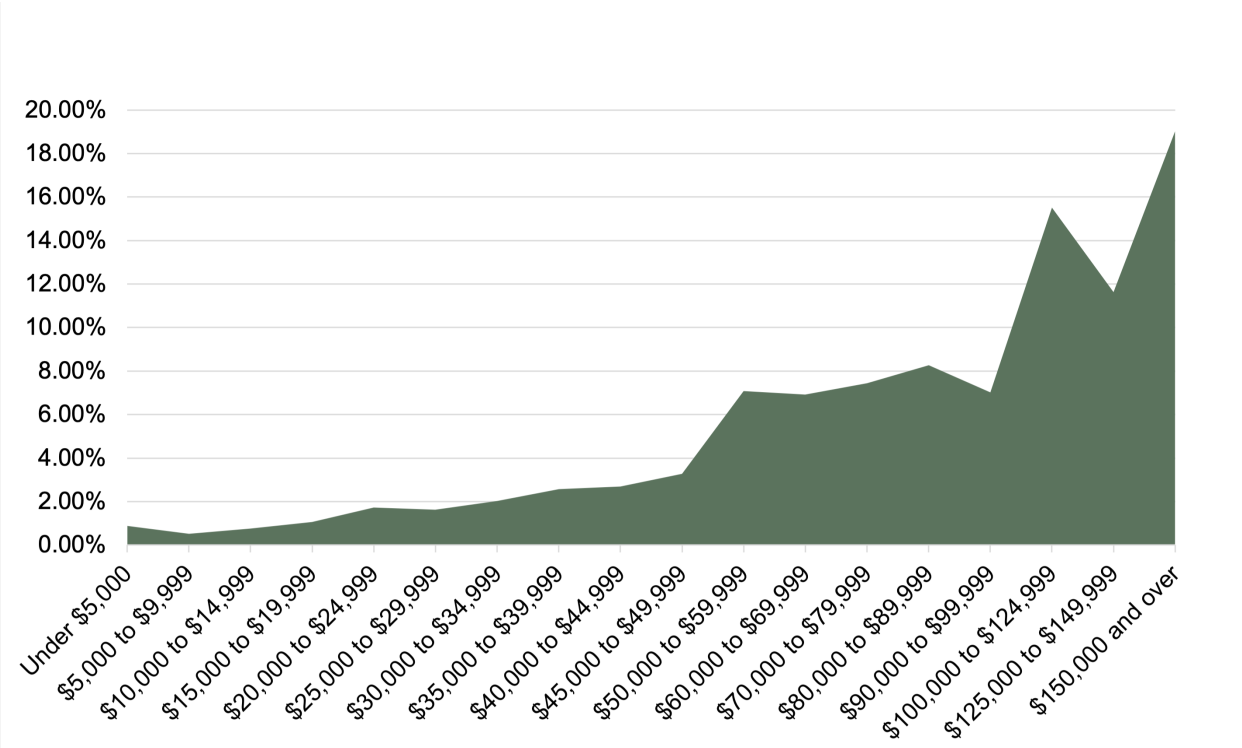
Finances

Rural wards have high levels of disposable income and smaller but still substantial amounts of discretionary income, which allows residents to participate in nonessential activities such as music. Figure 7 below shows the percentage of rural residents in each income bracket (Catalogue no. 98-400-X2016219, Statistics Canada, Custom Ward-Level Data purchased through Statistics Canada by the City of Ottawa). While this information can be interesting, it is often more helpful to look at measures such as disposable and discretionary income.

Disposable income is household income after paying taxes and mandatory deductions, while discretionary income is disposable income less expenses for necessary food and shelter.

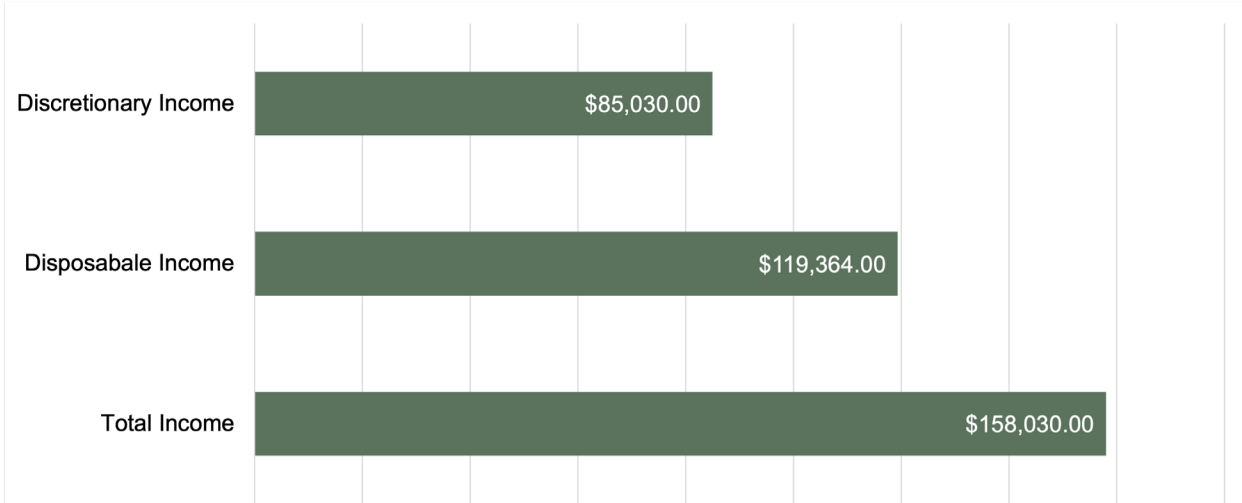
In rural Ottawa, the average household income is \$158,030 as of December 31, 2020, which corresponds to the second highest peak in Figure 7 (Wealthscapes Environics Analytics, 2022). The average household disposable income is \$119,364 and the average discretionary income is \$85,030 as seen in Figure 8 (Wealthscapes Environics

Figure 7: Income Distribution in Rural Wards



Analytics, 2022). This means that approximately 75.6% of household income is disposable while only 53.8% is discretionary. Discretionary income is the money that allows households to participate in non-essential activities such as music.

Figure 8: Discretionary, Disposable and Total Average Income for the Rural Wards



In addition to income, it can also be useful to look at assets. In rural Ottawa, liquid assets are held by 98.7% of residents making them the most common (Wealthscapes Environics Analytics, 2022). Liquid assets are assets that can quickly be converted to their cash value. A high number of holders in rural areas suggests that households may be more resilient in the face of financial hardships. Another interesting thing to note is that 15.1% of rural residents hold unlisted shares (Wealthscapes Environics Analytics, 2022). It is likely that most of these shares are related to family farms which are prevalent in the area. These shares are considered non-liquid assets.

Outside of resident income, targeted funding for rural music scenes could be considered. Financing issues are present in many music scenes and isolation only compounds the issue (Ballico, 2021). Despite this lack of financing, it is still possible for rural areas to have what Gibson and Gordon call community music. Community music is defined as active participation in music which is not driven by a desire to generate a profit (Gibson and Gordon, 2018). Goals of community music include education, socialization, community engagement and fun (Gibson and Gordon, 2018). These principles are clearly expressed by interviewees.

Multiple interviewees mention that their activities are not driven by profit motivation but rather for the enjoyment of participating in and sharing music. For example, some shows donate their profits back to the venue so that the communities can improve their pre-existing venues. This may include adding accessible washrooms, ramps or rejuvenating the venue. It is also believed that music events depend heavily on fundraising and can benefit from large partners such as the NAC. Rural organizers note the need to be flexible and creative to create opportunities, especially throughout the pandemic.

Due to financial challenges, rural music requires local buy-in (Bennet et al., 2020). This buy-in seems to be abundant in rural Ottawa. An interviewee notes that working with the local community to plan an event is like “having a really good friend who knows everyone and is going to bring them to the party.” Additionally, it is suggested that rural community members are willing to offer their time and skills to make events successful.

A particular need for support to help bring music outdoors during COVID-19 is identified by interviewees, although it is unclear if that need will persist into the future. It is possible that outdoor music events will remain more popular even after the pandemic ends. If this is the case, support may be appreciated into the future.

Despite the benefits of community music, venues need to make profit to keep their doors open. For some venue owners, profitability necessitates adding additional aspects to their venue such as food or drink menus, even if this is not the primary goal of the venue. However, owners also note that property prices are much lower in rural areas, making venue ownership more attainable.

Tourism

Music can provide economic benefits to rural areas. For example, in Manitoba every dollar invested into the music industry by the federal government returned \$4.12, which can benefit the province's mostly rural economies (Nordicity, 2016). Interviewees in Ottawa also recognize this potential, suggesting that bringing audiences into rural wards for music would encourage them to visit other local shops or restaurants. Moreover, it is thought that ruralness can be marketed as a positive reason to visit a location (Bennett et al., 2020).

Interviewees agree with this, commenting that "people love the quietness of the country and the open space and clean air" and that traveling to Ottawa's rural wards allows visitors to "leave all their city worries behind" (edited for clarity). Participants seem to believe that support for tourism to rural Ottawa currently exists in the form of grants and tourism associations such as Ottawa Tourism and Ottawa Valley Tourism. These agencies can be used to offer promotions of places to stay with tickets to rural events to boost awareness.

Interviewees also acknowledge how important it is to be seen as offering something unique. It is less likely people will travel or stay overnight for a show if it is something they can experience elsewhere. Therefore, it is important to advertise as a specialty attraction and use any bit of uniqueness as an advantage. Examples of this include planning shows in the fall to showcase the beauty of the Ottawa Valley and promoting local fairs as opportunities for music.

Bennett et al. add that potential marketability of rural areas can be reduced by lack of infrastructure (2020). Rural Ottawa may be a unique case in this instance. Being within driving distance of the city center means that tourists do not need to commit to being away from city infrastructure for long periods of time.

Additionally, interviewees tend to feel that there is existing music infrastructure in their rural ward. The majority of this infrastructure is thought to be in the form of spaces that do not have music as a primary focus but that can be used as music venues, including pubs and restaurants. While there are drawbacks to this, it has been recognized in the literature that repurposing and leveraging existing infrastructure is necessary to grow a rural music community (Thompson, 2020; Off, 2017).

Two caveats must be noted here. A few interviewees believe that there is very little infrastructure in their ward, potentially due to demographics and demand. Second, the lack of venues specifically for music is expressed as a disadvantage. To further contextualize this, there is only one venue in the rural wards which is solely dedicated to music. An interviewee suggests that a small venue (around 50 seats) with good acoustics, comfortable seating, lighting, a PA system, and a stage could be very beneficial to both performers and audience members. Multiple uses are suggested for such a venue, including recitals for music students, local performers and to attract non-local talent.

That being said, it appears that rural Ottawa may be more marketable as a tourism destination than other rural areas as it possesses all the typical rural attraction with more access to infrastructure than might typically be expected. For this reason, music tourism should be explored as an option to boost rural economies.

An additional tourism strategy for rural Ottawa could be marketing it's ruralness to musicians. Spending time in rural areas allows artists to avoid the high pressures of booking agents and music scenes which are focused on financial success (Thompson, 2020). It's also thought that spending time in rural areas allows artists to bring more authenticity and escapism to their music (Thompson, 2020).

For artists who are just starting out, rural communities can offer more opportunities than city scenes which are focused on resumes and skill (Gibson and Gordon, 2018). This can also be beneficial to communities by providing access to artists who otherwise might not be attracted to the area (Ballico, 2021). While this opportunity was not discussed in the interviews, it is an opportunity for further research and consideration.

Additional Challenges

Being a rural musician can be difficult for many reasons. Opportunities to perform in rural areas are not always paid and local venues do not always prioritize local talent (Mahon et al., 2018; Gibson and Gordon, 2018).

Having the same performer more than once can decrease crowd size and more popular artists can draw bigger crowds (Gibson and Gordon, 2018). Interviewees echo these statements, wishing for more opportunities for local talent to perform. One interviewee suggests that local performers could be more involved with local fairs on smaller stages to balance demand for big names with opportunities for local talent.

However, it is worth noting that other interviewees comment on how much pride rural communities have for people from their communities who have “made it” in the music world. This interviewee suggests that rural communities are always excited to have such acts back for local performances. This implies that there may be some gaps for talent development in rural areas.

A final challenge rural venue owners identified is radius clauses. Radius clauses prevent artists from booking an additional show within a certain distance and a certain number of days. These clauses have historically been used by large festivals and stop rural venues from booking big name artists who are in the city for these festivals.

Not implementing radius clauses could improve opportunities for rural artists to book big name artists. Additionally, if radius clauses are felt to be necessary by organizers of large shows, there could be exemptions for small shows in rural communities within the radius. A limit on the size of the audience could be set in order to meet the objectives of both groups and reduce competition.



Flower-covered guitar in wicker chair © Jen Theodore, 2019

Conclusion

The existence of music culture and support for this culture has been evidenced by the interviews collected in this report. While this research provides insights into music in Ottawa's rural wards, it is important to remember that it is not generalizable to the entirety of the rural wards due to the small sample size. More work should be done to further inspect the findings outlined in this report.

Moving forward, any further research or policy initiative should be careful to acknowledge and value the existing music culture and community. Macro level policies that do not consider the local circumstances or include rural residents in the process can cause more harm than benefit (Off, 2017). One example of this is mandatory music curriculums, which were implemented in the United States (Off, 2017). The new curriculum required schools that taught specific genres of music and focused on choirs and bands, making the curriculum very hard to follow in rural schools (Off, 2017). This was due to the small number of students and the prevalence of music genres that did not honor the local culture (Off, 2017).

Building policies that are specific to rural wards based on research conducted on rural

wards will help to eliminate the risk of creating policies that are not effective in rural areas.

A study with a longer recruiting period could attempt to engage enough rural residents to conduct focus groups and determine if the ideas presented in this report are maintained by a larger sample. Alternatively, an open-ended survey could be conducted with the same goal. This method may encourage higher levels of engagement than focus groups as it is less demanding for participants. Either of these methods could also try to deepen understanding of the existing culture in the rural wards.

Additionally, once the pandemic ends, it will be interesting to re-examine the data. Important points to focus on here include considering the presence of a millennial migration growing rural populations and changes in commute times associated with COVID-19. The pandemic may also cause a long-term increase in outdoor events, which will impact the type of support needed. This could be considered moving forward. Additionally, commute data does not examine the mobility of retired residents. Since it is likely that a large proportion of rural communities are retired, it would be interesting to consider the mobility of this population specifically. Retired residents may face increased barriers to participation and may need support to reduce these barriers. As sustained above, the literature suggests that programs that bring artists into rural areas can be successful for both parties. Further work could be done to determine if such a program would be beneficial in rural Ottawa.

Finally, focus groups with urban or suburban residents could be considered. These focus groups could examine urban residents' music habits and specifically their interest and ability to travel to rural wards to experience music.

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Appendix 1 | Interview Questions

Below are the questions asked of interviewees based on the type of respondent. Interviewees were asked as many questions as possible within the interview time constraint. Some interviewees answered questions from multiple categories and the questions below were used primarily as an outline. If other lines of discussion emerged, they were followed to enhance the knowledge gathered.

Business owners, sector employees and those who remain in their rural ward of Ottawa

1. Briefly share what your role is in the music community and what your favorite part of music in Ottawa is?
2. Why did you choose to open your music business in a rural ward? Is proximity to the city core something you considered when choosing where to open your business? Why or why not?
3. What benefits do you experience from being located in a rural community?
4. What infrastructure does your community have in place that is used for music? This can include the infrastructure your business provides as well as other spaces available in the community.
 - a. Is music the primary intent of this infrastructure?
5. Is your community currently lacking resources for music?
 - a. If yes, what resources specifically are missing?
6. Does your community have existing infrastructure that could be repurposed for music use that isn't currently filling that role?
7. Are there any barriers stopping you from tapping into the urban music scene?
 - a. If yes, do you have any ideas of how the barriers could be alleviated?
Do you want the barriers to be alleviated?
8. Ottawa's Rural Economic Strategy suggests the agriculture and ecological tourism are areas that can bring people to rural Ottawa. Do you think that music tourism can play a role in this as well?
 - a. How do you think agricultural, ecological and music tourism can all work together to achieve economic prosperity in rural Ottawa?

9. Do you feel that there's anything that has been missing from our discussion thus far? Please feel free to provide any additional information you think applies.

Interviewees who travel to the city to experience music

1. How do you travel to the city? Do you experience any difficulties in getting there?
 - a. If barriers exist, how might they be alleviated?
2. When are you most likely to experience music in the city and is there a particular reason for this timing?
3. In general, do you face any barriers to participation in the Ottawa music community?
4. Where specifically in the city do you experience music?

Venue Owners

1. Tell me the story about the venue you own. Consider including how long you have been in business, what makes your venue unique, what kind of talent/ audience you attract and any other details you feel capture the essence of your venue.
2. Why did you decide to open a venue and why did you choose a rural area to do so?
3. Are there challenges associated with being located in a rural area?
 - a. If yes, what challenges do you face?
4. What do you like about being located in a rural area? What value does the community bring?
5. Do you know your audience? Are they typically local or from the city? Do people travel to access your venue? Please share as many details about your typical audience as possible.
6. Do you see potential for music tourism in rural Ottawa? What are the opportunities, and do you think they are being capitalized on? What could be done to capitalize on them further?
7. Is there anything else you think is important that we haven't touched on today?