

Advancing Toronto's
prosperity,
opportunity
and liveability

Music Sector Report
Economic Development & Culture

Economic Development and Culture

Film and Entertainment Industries
(Film Commissioner and Director of Entertainment Industries)



Music



Music SDO

Film



Film Manager
(Film Permits)
Film SDO

Event Support



Manager
Event Support

Tourism / Visitor Services



Manager
Tourism and Visitor Services

Toronto Music By The Numbers

- 2014 economic impact: **\$700 million** (est. Toronto Star)
- number of live venues: **450+** (115 core business; 350 secondary / occasional)
- percentage of Canadian recording industry's 2013 estimated \$800 million economic output: **80 per cent** (Statistics Canada)



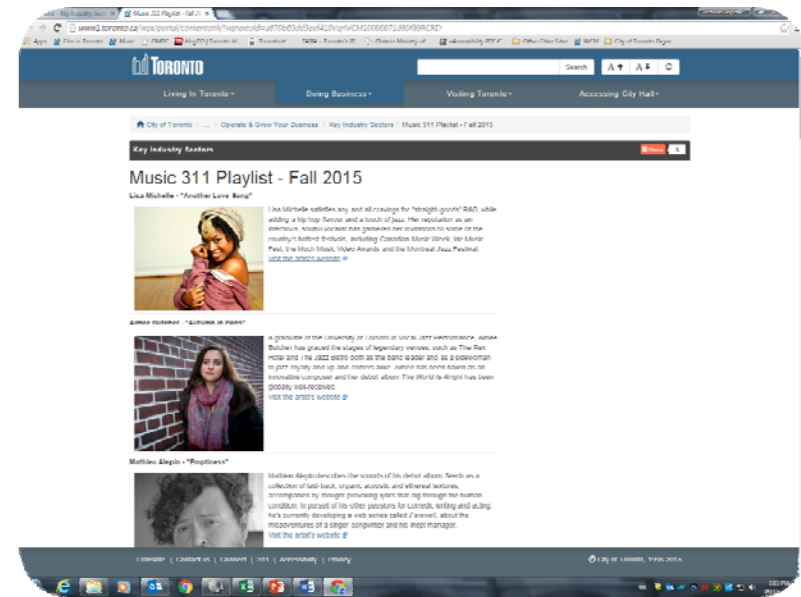
Ferraro Live at City Hall

Across Canada

- revenue generated by independent, Canadian-owned music industry: **\$292 million**
 - contribution to GDP: > **\$300 million**
 - number of people employed by the independent sector: **13,500** (CIMA, 2011)
- revenue generated by live music sector: **\$455 million** (PricewaterhouseCoopers)
- average annual growth rate of Canadian live music market since 2010:
6.4 per cent (PricewaterhouseCoopers)
 - percentage of national live revenues attributed to Ontario: **80 per cent**, up from 65 per cent in 2005

2015 Music Activities, Film and Entertainment Industries

- **streamlining of City regulations**
(postering fines, noise bylaw, park permits)
- **Music 311**
- **Live from City Hall**
- **South by Southwest activations, Austin TX**
- **“A Tale of Two Cities”**
Toronto-Chicago Sister Cities concert exchange
- **alignment with Ontario’s music strategies**
- **client service**



Music 311 page at www.toronto.ca/music

Ferraro – Live From City Hall



Economic Development & Culture Division

Advancing Toronto's prosperity, opportunity, and liveability



Sector Opportunities

- adopt comprehensive **Music Strategy**
 - TMAC involvement
- update **planning and permitting** policies
 - definition of “employment”
- review **music venue licensing**



Big Tobacco & The Pickers Live From City Hall

Sector Threats

- **slow regulatory reform**
- current **zoning regulations and Official Plan designations** can be obstacles to sector development
 - limits on what uses are permitted at individual addresses
 - existing Employment Lands designations and the current definition of "employment"
- increasing **high-density residential growth**, especially in culturally thriving downtown locations
- **lack of large venues:**
 - 1,000 – 5,000 capacity indoor venues
 - > 30,000 capacity outdoor festival sites
- **affordability for musicians:**
 - cost of living and housing
 - accessibility to affordable rehearsal space
 - lack of fair compensation for work
 - no extended health or dental benefits
- **poor industry infrastructure for certain genres** (e.g. hip hop, reggae, world)

2016 Music Goals, Film and Entertainment Industries

- help TMAC **finalize Music Strategy** document
 - present finalized document to Committee and Council
- conduct and **present sector research**
- work with other City divisions to **review and update policy and regulations**
- work with City Councillors to **build a music-friendly city**
- help **build music tourism**
- **increase the visibility of music** across Toronto
- **enhance Toronto's music alliances** with other cities