

## **Toronto Music Strategy**

*Supporting and Growing the City's Music Sector*

Created by the **Toronto Music Advisory Council**  
for the City of Toronto

February 2016

## Background

In December 2013, City Council voted in favour of the creation of the Toronto Music Advisory Council (TMAC). The council includes 30 volunteer members representing a wide spectrum of Toronto's music sector, along with 6 City Councillors and 2 City staff (see Appendix 1). TMAC members are appointed by City Council for a four-year term. Their role is to provide insight, recommendations, and connections to assist the City in the development of the music sector.

Accordingly, the members of TMAC have reached consensus in creating the following Music Strategy to guide the short- and long-term growth of Toronto's music sector.

TMAC and the City of Toronto invited public consultation on a draft of this Music Strategy via an online survey accessible for three weeks during December 2015. The survey questions were designed to offer residents of Toronto an opportunity to share opinions and to comment on key elements in the draft Music Strategy. When the survey closed on December 31, 2015, it had generated 6,100 responses. Public feedback gathered during the online consultation period has been incorporated into this final version of the Music Strategy.

## The Musical Context

### Toronto is a leading Music City today

Toronto is Canada's largest city and the country's economic powerhouse, home to the head offices of the largest corporations and a thriving entrepreneurial sector. It is the 4<sup>th</sup> largest city in North America, behind Mexico City, Los Angeles, and New York City, and ahead of Chicago.

It is also **Canada's cultural capital**, with an unparalleled variety of cultural activities available reflecting the population of the world's most diverse city. This unique stylistic diversity means that on any given evening, music fans can choose between seeing a world-renowned singer at the opera, an internationally acclaimed hip hop artist at a stadium show, a Bollywood musician at a street festival, or an indie pop band in an intimate venue. And Torontonians enjoy this access -- statistics show consistently high levels of public engagement, with 71% of Torontonians regularly attending arts performances.<sup>1</sup>

Toronto is the focal point of the Canadian music industry, and the home of most of the Canadian sector's major players. Toronto attracts the world's top acts to perform for local audiences, while consistently producing some of the world's leading artists across a wide range of genres.

With heightened collaboration between the music community and the municipal government, Toronto can take its place among the top tier of Music Cities in the world alongside London, New York, Berlin, Nashville, Los Angeles, Austin and Melbourne.

**All Torontonians – music oriented or not – will benefit from a more robust music sector.** The business of music contributes to the economy of Toronto, generating employment, bringing revenue to other industries, growing tourism, and creating an exciting and dynamic place to live.

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<sup>1</sup> <http://www.torontoartsfoundation.org/tac/media/taf/Research/Toronto%20Arts%20Facts/TorontoArtsFacts.pdf>

## The Toronto Music Sector in Numbers

Invest Toronto ranks Toronto as **North America's 3<sup>rd</sup>-largest music market**. Toronto is home to Canada's largest community of artists;<sup>2</sup> as such, it is also unquestionably the largest music city in Canada and the centre of the country's music industry. The city is home to:

- 18,500+ songwriters, music creators, composers, beatmakers, and lyricists
- professional performing & recording musicians from over 150 countries
- 540+ places to enjoy live music, from coffeehouses and restaurants, to legendary clubs like the Horseshoe Tavern and the Rex Hotel, to iconic venues such as Massey Hall, to new world-class concert halls such as Koerner Hall and the Four Seasons Centre, and large multi-use facilities such as the Air Canada Centre and Rogers Centre. Over 250 of these locations have live music at least twice weekly.
- 75 core music festivals and music conferences across a multitude of genres, with total attendance of over 2.6 million
- world-renowned opera companies, including Opera Atelier and the Canadian Opera Company; and orchestras, including Tafelmusik and the Toronto Symphony Orchestra
- community music ensembles, including Echo Women's Choir, Scarborough Philharmonic Orchestra, and Etobicoke Community Concert Big Band
- numerous not-for-profit music presenters / producers, including the Music Gallery, Soundstreams, and ArrayMusic
- 55+ artist agencies and management companies
- 40+ music publishing, licensing, and distribution companies
- 95+ recording facilities, including Noble Street Studios, Phase One Studios, Revolution Recording, and Lacquer Channel Mastering
- 95+ record labels, including the Canadian headquarters of major labels Sony Music Entertainment Canada, Universal Music Canada, and Warner Music Canada, and leading Canadian independent labels such as Anthem Records, Arts & Crafts Productions, Dine Alone Records, Last Gang Records, and Six Shooter Records
- concert promoters, including Live Nation Canada, Collective Concerts, and Embrace Presents
- ticket sales accounting for over \$150 million for Toronto music events annually
- stylistically diverse radio stations and an engaged, informed multi-platform music media
- music retailers and streaming services
- music equipment and instrument retailers and manufacturers
- over 180 music education institutions, including The Royal Conservatory, Harris Institute, Trebas Institute, Canada's Music Incubator, the ReMix Project, Humber College, and the University of Toronto
- supporting services such as entertainment lawyers, business managers, accountants, arts administrators, and funding agencies

The music sector is a **significant contributor to Toronto's economy**, with an economic impact estimated by the Toronto Star at **\$700 million in 2014**.<sup>3</sup>

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<sup>2</sup> <http://www.torontoartsfoundation.org/tac/media/taf/Research/Toronto%20Arts%20Facts/TorontoArtsFacts.pdf>

<sup>3</sup> [http://www.thestar.com/entertainment/2014/02/19/toronto\\_tries\\_to\\_sing\\_austins\\_tune.html](http://www.thestar.com/entertainment/2014/02/19/toronto_tries_to_sing_austins_tune.html)

- Statistics Canada estimates that the Canadian recording industry (including both foreign-owned and independent, Canadian-owned companies) had a total economic output of \$800 million in 2013<sup>4</sup> and that Toronto is home to approximately 80 per cent of this figure.<sup>5</sup>
- *Live Music Measures Up* (2015), a report published by Music Canada and Nordicity, estimates that spending by live music companies and the tourism activity generated by music festivals in Ontario contributed just under \$1.2 billion to Ontario's GDP and over \$430 million in combined tax revenue for all levels of government.<sup>6</sup> Not unlike the recording sector, much of this activity takes place in Toronto.
- According to *The Great Musical North* (2009), a report done by the Martin Prosperity Institute at the University of Toronto's Rotman School of Management, the Toronto music industry has a relatively larger share of regional employment than do either New York City or Austin, Texas.<sup>7</sup>
- 69 non-profit music organizations receive operating funding support from Toronto Arts Council and an additional 2 from the City of Toronto (Canadian Opera Company, Toronto Symphony Orchestra), earning \$90 million in revenues annually and attracting 2.5 million in attendance at their performances. These not-for-profit organizations also leverage funding from private donors and other levels of government with the result that for every dollar invested by the Toronto Arts Council, another \$14 is raised from other sources.<sup>8</sup>

### The Benefits of Being a Music City

The music sector provides direct employment, pays business taxes, and generates spending in other sectors such as restaurants, hotels, photographers, videographers, stylists, graphic designers, taxi and limo companies, travel agents, web designers, caterers, accountants, and advertising agencies. It also provides essential contributions to the creative industries such as film, television, digital interactive media, fashion, and the production of live events.

Live music venues, music festivals, and music conferences attract hundreds of thousands of tourists annually to Toronto, while industry assets like recording studios, agencies, management companies, and publishers draw the world's music business to the city with concomitant economic benefit.

A vibrant music sector helps attract new innovative businesses. Executives and entrepreneurs alike seek to live and work in a city that provides them with a rich social life, and music is essential in the equation. For example, Austin, Texas has become America's fastest growing city by leveraging its vibrant music scene as a key draw for technology companies and their employees.

Beyond pure economics, music is a contributor to the positive social and cultural fabric of the city. Music is a form of celebration, with the power to build bridges and unite communities. Music adds

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<sup>4</sup> Statistics Canada - Sound Recording and Music Publishing, 2015 - <http://www.statcan.gc.ca/daily-quotidien/150812/dq150812a-eng.htm>

<sup>5</sup> Music Canada – "Economic Impact Analysis of Sound Recording Industry in Canada" 2012 (page 20, table 4) - <http://musiccanada.com/wp-content/uploads/2014/06/Music-Canada-Economic-Impact-Analysis-of-the-Sound-Recording-Industry-in-Canada.pdf>

<sup>6</sup> [file://localhost/Music Canada – "Live Music Measures Up" 2015](file://localhost/Music%20Canada%20-%20Live%20Music%20Measures%20Up%202015) - <http://musiccanada.com/wp-content/uploads/2015/12/Live-Music-Measures-Up.pdf>

<sup>7</sup> [http://martinprosperity.org/images/stories/jmc/cache/mpj-The\\_Great\\_Musical\\_North.pdf](http://martinprosperity.org/images/stories/jmc/cache/mpj-The_Great_Musical_North.pdf)

<sup>8</sup> <http://www.torontoartscouncil.org/tac-impact>

vibrancy, celebrates diversity, and increases the liveability of Toronto. For example, the Scotiabank Caribbean Carnival, North America's largest outdoor festival, not only generates significant revenue for Toronto, but showcases the city's musical diversity to an international audience, while providing performance opportunities for both professional and community-based groups, and creating a focal point for Torontonians to unite in celebrating of music and culture.

Internationally renowned urban studies theorist and Toronto resident Richard Florida states, "Arts and culture occupations are one of three major occupational groups (the others are science and engineering and business and management) that add to regional wages and productivity."<sup>9</sup> He adds that "Places that succeed in attracting and retaining creative class people prosper; those that fail don't."

### **The Role of the City of Toronto in Promoting and Growing the Music Sector**

The City of Toronto, in collaboration with the provincial and federal governments, has a responsibility to ensure Toronto remains a vibrant and culturally rich city, for the societal and economic benefit of all Torontonians. The City can advocate for the music sector, and help ensure a regulatory framework that allows a diverse range of music creators and businesses to flourish throughout Toronto.

This responsibility extends beyond the roles played by the Economic Development and Culture division. Other City divisions such as Planning, Municipal Licensing and Standards, Transportation, and Parks Forestry and Recreation can contribute to the success of music in our city, as a wide range of policy and implementation is needed to ensure sectoral growth and long-term health. For example:

- ensuring Toronto musicians have fair opportunities to participate in City-sponsored events
- creating easier access to City venues and facilities for music programs
- ensuring that City-run music programming is a model for fair artist compensation
- supporting music programs and education for disadvantaged communities, particularly those communities identified in the Toronto Strong Neighbourhoods Strategy 2020
- communicating, and in some cases supporting, opportunities for creators to access financial support through arts councils, grant programs, and private-sector sponsorship
- ensuring competitiveness with other cities
- reviewing the City's regulatory framework regularly to keep pace with the development of the music sector
- including the needs of existing music businesses in City development plans

### **Public Consultation**

Online public consultation on a draft of this Music Strategy yielded robust public engagement of over 6,100 responses during December 2015. A majority (57%) of respondents identified themselves as musicians or as working full- or part-time in the music industry, and 27% identified as enthusiastic fans active in Toronto's scene; accordingly, the survey's qualitative (open comment) responses reflected respondents' deep involvement with and insights into the Strategy's key content areas.

Consistent patterns of response emerged via the public consultations, including:

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<sup>9</sup> <http://www.citylab.com/work/2012/05/what-critics-get-wrong-about-creative-cities/2119/>

- 82% say the City should be an active partner in developing a thriving music sector
- 92% believe music should be a bigger part of Toronto’s education system
- 90% would like to see more music in City parks
- 67% say the music industry is “extremely important” to the area of the city in which they live
- 61% think the City should play a role in musicians being compensated fairly for live performances and the commercial use of their music

In addition, respondents identified three main areas of activity in which the City of Toronto should engage to support and grow the music sector:

- providing more opportunities for performances across the city, including underrepresented styles of music (35%)
- reviewing bylaws and regulations affecting musicians and the music industry (29%)
- building Toronto’s identity as a music city and music-tourism destination (28%), as 77% of respondents believe the talent of our local musicians and our diversity in music are key strengths to be highlighted

## The Music Strategy

The Music Strategy aims to maximize the tremendous potential of Toronto’s music sector. A cohesive Music Strategy will in the short term generate increased employment and economic benefit for those working in the sector itself and in related industries of digital media, film, tourism, hospitality, and retail. It will also help foster a climate of engagement and inclusivity across the city’s many neighbourhoods and cultures, and reflect the musical diversity of Toronto. In the long term, the Music Strategy will lay the groundwork for development of export-ready Toronto artists and drive growth in tourism as Toronto becomes more recognized globally as a world-leading music city.

To achieve these goals, the Toronto Music Advisory Council (TMAC), in collaboration with City staff and in consultation with the music community and the Toronto public at large, has identified six major strategic areas for focus in Toronto:

1. Support an environment friendly to music creators.
2. Encourage the business of music in Toronto.
3. Support music education.
4. Promote Toronto’s music sector locally and internationally.
5. Foster alliances with other music cities around the world.
6. Implement a process for monitoring progress and measuring success.

TMAC recommends that these six areas be addressed as follows in Toronto’s Music Strategy.

### **1. Support an environment friendly to music creators.**

A world-class music city is a place where musicians, songwriters, recording engineers, music videographers, and other music creators live. These innovators are drawn to creative hubs throughout the city, where they collaborate and inspire each other. In turn, their presence and their activities draw

other young professionals who want to work and live in these newly chic enclaves. Priorities for Toronto to be more accessible for music creators are:

- **Professional education programs** – Making music a career rather than just a hobby is a challenge. Most music creators are entrepreneurs, essentially operating their own small businesses with limited professional support. For this reason, other music cities such as Austin, Texas, and Bogota, Colombia have identified artist entrepreneur training as a key priority. The City can play a key role in providing access to information and learning, partnering with corporate sponsors to help defray the costs when possible.
  - Creators are often unaware of the resources available to them in Toronto. In the same way the City currently produces forums for small business today, it could help facilitate opportunities for music creators to learn about existing infrastructure and resources and to connect with industry leaders. Forums could include insight and advice from professional organizations such as SOCAN, MusicOntario, Folk Music Ontario, and the Toronto Musicians’ Association; funding sources such as FACTOR, Starmaker, and the Ontario Music Office; and professional development opportunities like Canada’s Music Incubator, the Remix Project, Manifesto, and the Neighbourhood Arts Network’s *Making a Living, Making Art* series.
  - Artists, organizations, and music companies should be made aware of funding opportunities provided through the City’s not-for-profit arts programs, including those supported by the Toronto Arts Council.
  - Professional development also includes the development of musical craft, often through touring, festival showcases and residencies. The City, through the Toronto Arts Council and TMAC’s International Alliances working group, could help local musicians to identify opportunities, industry connections, and funding to assist with this type of development.
- **Affordable housing** – The professional (and aspiring professional) music community has traditionally congregated in the downtown core, often finding housing in older, underdeveloped areas of the city. As gentrification and redevelopment of these neighbourhoods occurs, housing costs increase, frequently placing affordable housing beyond the means of music creators. Toronto risks an exodus of music creators to Burlington, Hamilton, Kitchener and other Southern Ontario cities where housing is more affordable and the cost of living is lower.
  - The City can explore strategies to make safe, affordable housing available to music creators throughout the city, including the inner suburbs, to ensure cultural vibrancy everywhere. To assist with this objective, the City and TMAC can consider partnerships with organizations like Artscape, which has created affordable housing for local artists. Toronto can also look to other jurisdictions for successful models: Nashville’s Ryman Lofts, an affordable housing project with 60 units geared towards artists, was completed in 2013. New York City recently announced a commitment to build 1,500 affordable apartments for artists and musicians.<sup>10</sup> And following the release of the music census in Austin, which identified affordable housing as a primary need, housing developments in that city are now holding places for low-income working creators, including the 135 unit Capital Studios.<sup>11</sup>

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<sup>10</sup> <http://observer.com/2015/02/please-dont-move-to-austin-mayor-announces-affordable-housing-for-artists/>

<sup>11</sup> <http://austinmusicpeople.org/wp-content/uploads/White-Paper-2013.pdf>

- **Rehearsal space** – Musicians need affordable places to practise and hone their craft. Many of Toronto’s existing rehearsal facilities are located in industrial areas, with multiple rooms that can be rented by the hour, day, or month. They may contain sound or backline equipment, to allow artists to replicate the conditions of a public venue performance. However, with capacity well below demand, and at \$15-30 per hour, rehearsal space is inaccessible for many developing, independent, and community acts. The City can explore partnerships with commercial businesses, Business Improvement Areas (BIAs), and the Toronto District and Catholic District School Boards to make unused buildings available for music rehearsal at affordable rates, and consider leveraging underutilized municipal resources throughout the city. For example, Sydney, Australia makes city spaces in community centres and town halls available to student performers for rehearsal space as part of their Live Music and Performance Action Plan.<sup>12</sup> Also, consideration should be given to zoning more live/work spaces, so performers can rehearse at home.
- **Performance space** - Finding locations to hold performances can be cost prohibitive for developing artists and community groups. As the City and potential partners, including school boards, consider making available underutilized public resources for rehearsals, they can also explore making spaces available for performances. These spaces need to be available throughout the City to support local communities of creators.
- **Fair compensation for performers** – Compounding the lack of affordable housing and rehearsal space is the fact that most musicians receive very low compensation for their work -- especially when their careers are developing. The payback for songwriting and recording can take years to be achieved, and as a result, many creators must survive on income from live performance. However, payment for live performances often consists of a bar tab and a share of the door, meaning that artists might only cover their own performance and transportation costs for the night.
  - The Fair Trade Music program, founded in Portland, Oregon, certifies venues that fairly compensate performing artists. Certified venues have a “Fair Trade” logo to display in their windows, on their website, and in promotional materials. Not only does this program help musicians determine where they want to perform, but it also helps audiences make educated decisions about which venues to support. The City can encourage Music Canada Live and TMAC to create and pilot in Toronto a voluntary program for venues and promoters to publicize their compensation of artists, which will encourage transparency and discourage unfair compensation practices.
  - The City can also work to increase public consciousness of the need to appropriately compensate performers. TMAC’s Advocacy working group can work with industry organizations, including the Toronto Musicians Association, to identify appropriate levels of compensation for performances, and then make those benchmark figures publicly available to encourage promoters, venues, businesses, and anyone hiring a musician to provide adequate compensation. TMAC could also encourage other industry associations, such as the Ontario Restaurant Hotel and Motel Association and Restaurants Canada, to provide more appropriately paid performance opportunities for Toronto musicians.
  - Because license fees from venues channel income back to music creators, the City of Toronto can encourage venues and other businesses to obtain the proper licenses from performance rights organizations such as SOCAN, Re:Sound, CONNECT and CMRRA for presenting live performances and playing recorded music, while working to ensure that

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<sup>12</sup> <http://www.cityofsydney.nsw.gov.au/explore/arts-and-culture/live-music-and-performance/rehearsal-spaces>



all City-owned facilities are appropriately licensed for all uses of music by these performance rights organizations.

- **Access to health and dental care** – Without extended health-care benefits to supplement OHIP, many music creators find the costs of prescriptions, eye care, therapy and other health necessities are beyond their means. Dental care is also often inaccessible, and yet essential for performers whose appearance is part of their stock in trade. Efforts should be made to promote awareness of organizations that assist with or provide physical and mental health care and dental care, through encouraging their presence at industry and City of Toronto events. Further, the City of Toronto and TMAC should help build awareness in the music community about support organizations already working on behalf of artists, such as the Unison Benevolent Fund, which provides counselling and emergency relief services to musicians.
- **Financial programs** – Existing provincial and federal funding programs such as the Ontario Music Fund and FACTOR, while providing much-needed support for the music industry, are also often project specific (for example, recording an album or making a video), highly competitive, and difficult for emerging artists to access. Demand consistently exceeds resources: for example, the recently developed Toronto Arts Council program for Music Creation and Audio Recording was so highly subscribed that it was able to address less than half of the \$1.5 million worth of funding applied for.
  - City Council should consider permanently enshrining its recent commitment to increased arts investment to help address the shortfall in financial program funding.
  - The City, through Film & Entertainment Industries and TMAC’s Financing, Funding, and Sponsorship working group, could disseminate information about public-sector funding programs, and direct interested artists to assistance in applying.
  - The City can also provide support to local artists in applying for existing programs, through promoting awareness of these programs and of grant writing workshops like those currently provided by the Toronto Arts Council.
  - The City, in conjunction with TMAC’s Financing, Funding, and Sponsorship working group, could develop funding programs directed specifically at emerging artists. For example, Mannheim, Germany administers a “Young Talent” program that gives out 2-year awards to developing talent based on a jury process. Recipients do not pay back the funding, but instead perform free public concerts and assist in the promotion of the city’s culture.

## **2. Encourage the business of music in Toronto.**

The music sector is a significant employer in Toronto. In addition to the music creators themselves, the sector provides jobs for people working at record labels, music publishers, recording facilities, music venues, ticketing companies, radio stations, art foundations, music stores, instrument manufacturers, and as freelance publicists, graphic designers, journalists, photographers, stylists and in many more roles.

When Toronto’s music businesses are successful, they maintain and grow employment, utilize the services of other Toronto businesses, and pay taxes. They contribute to Toronto’s overall economic health. The City can encourage the growth of Toronto’s music business by spearheading work in these areas:

- **Bylaws and regulations** – The City should consider the needs of the music community when updating or implementing new bylaws and regulations, and wherever possible adopt progressive policies introduced in other jurisdictions to address potential conflicts between music industry stakeholders and the wider public interest. As well, the City should work to streamline regulations and permit processes, removing unnecessary bureaucracy.
  - Noise regulations must balance the interests of residents and other businesses with those of venues and concert promoters, ensuring the well-being of the music industry as well as the wider public interest without unnecessary restrictions and fines.
  - Zoning, building and planning policies should acknowledge the value of pre-existing music venues in ascribing greater noise mitigation obligations to new neighbourhood entrants. Greater flexibility is also needed from the City in creating conditions to encourage music industry stakeholders seeking to build new music venues or adapt existing buildings for this purpose.
  - An overwhelming majority of public response expressed a wish for more music in City of Toronto parks. Access to performance permits for public spaces including parks must be equitable, consistent, and clearly explained, and must encourage and allow for more music performances presented by both not-for-profit and for-profit stakeholder groups.
  - The needs of individual musicians should be acknowledged: for example, in 2014, Seattle, Washington created musicians’ loading zones within 100 feet of the entrance to major music venues located downtown in congested areas. In Toronto, to unload equipment, musicians currently either must block traffic, risk costly parking tickets, or lug heavy gear for blocks. In consultation with TMAC, music industry representatives, and local Councillors, the City can facilitate the creation of temporary loading and unloading zones at key locations serving large music venues or clusters for live music.
- **Creation of a business networking website** – The City can coordinate the creation of a comprehensive listing of all music businesses and assets in Toronto. The database would include managers, labels, studios, venues, music organizations, and more, and would be positioned as a primary information hub for anyone within or outside Toronto looking for data on the city’s music sector. Existing online assets such as the Digital Main Street project currently under development by Enterprise Toronto could be leveraged in this context.
- **Business education & seminars** - Like individual artists, music businesses may not be aware of the resources available to them, or of the regulatory requirements of their business. The City can play a role in organizing business forums to educate business owners, including sharing best practices to build a more successful music business sector. Topics could include: organizing music events in non-traditional spaces, building audiences for events or venues, smoothly integrating music businesses with the surrounding community, and accessing funding. In supporting such business forums, the City would demonstrate a recognition that building stronger and self-sustaining music businesses strengthens the ecosystem of the music sector, which should lead to increased compensation for creators.
- **Financing & sponsorship** - The City and TMAC, through its Funding, Financing, and Sponsorship working group, can play an important role in helping connect sponsors and financiers with the music community – so all may benefit through the creation of private and public partnerships. The City and TMAC should collaborate to create a sponsorship toolkit to educate the music sector on how to present and pitch their opportunities. Similar to the Billboard Tax for

investment in the arts, enacted in 2013,<sup>13</sup> City Council may also consider diverting funds from industries which directly benefit from the music industry, such as hotels and hospitality, to create additional funding for financial programs. San Francisco, California has enacted a hotel tax, where revenue derived delivered over \$10M to arts and cultural organizations in 2015.<sup>14</sup>

- **Business Improvement Area (BIA) and Toronto Association of Business Improvement Areas (TABIA) support** – Following an example set by the Downtown Yonge BIA and Queen St West BIA, which have both created music strategies and/or music activations to support and increase the profile of music within the communities they represent,<sup>15</sup> the City and TMAC can encourage other BIAs and the overarching TABIA to create plans to support their local music communities and make music more visible and vibrant in every neighbourhood across Toronto. The City and TMAC could also encourage BIAs that are planning events to incorporate local artists and organizations that reflect the cultural demographics of those communities.
- **Access to civic venues and City-sponsored programs** – The City owns venues, including the Sony Centre for the Performing Arts, the St. Lawrence Centre for the Arts, and the Toronto Centre for the Arts. Improving access to these facilities will not only benefit music businesses and creators, but also increase the usage of and revenue generated by these City resources. Elsewhere, City programs that tangibly and directly benefit local artists – such as Music 311 and Live from City Hall – should be made permanent and enhanced.
- **Public transit** – To support live music events (while relieving traffic congestion and discouraging driving under the influence), expanded public transit options to and from concerts can be made available. Transit options should serve large festivals and concerts and areas with a concentration of music venues, especially in the downtown core.
  - Extension of subway hours to facilitate transit use for those attending late night music venues, or event-specific operation (such as to Downsview Park) needs to be considered. The State of Victoria in Australia recently announced all-night public transportation would be available on weekends beginning January 1, 2016.<sup>16</sup>
  - As digital fare or “smart card” systems are implemented, the City can consider providing fare discounts for culturally significant events to promote the use of public transit.
  - Further, the City should explore ways of enhancing transit to important performance venues outside the core including the Aga Khan Performing Arts Facility, PC Ho Chinese Cultural Centre, and the Toronto Centre for the Arts.
- **Creation of a physical Music Hub** – A long-term but important goal of Toronto’s Music Strategy is the creation of a physical Music Hub to act as the epicentre of the city’s music community. A Music Hub would be a focal point for showcasing Toronto talent, delivering professional development, inspiring Toronto youth, and celebrating Toronto’s music sector. Mannheim, Germany converted an abandoned building in an at-risk neighbourhood into such a hub, creating rehearsal and performance spaces, offices and meeting rooms for music businesses, and areas to network and connect. Rental fees and corporate sponsorships offset the operation costs of the hub. Mannheim’s initiative provides a physical presence for music development efforts while simultaneously bringing excitement and revitalization to a distressed area of the city. A similar effort took place in Memphis, Tennessee, where the Memphis Slim Collaboratory

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<sup>13</sup> [http://www.thestar.com/entertainment/2013/01/16/torontos\\_billboard\\_tax\\_set\\_to\\_fund\\_city\\_arts\\_and\\_culture.html](http://www.thestar.com/entertainment/2013/01/16/torontos_billboard_tax_set_to_fund_city_arts_and_culture.html)

<sup>14</sup> [http://www.sfgfta.org/about/history\\_and\\_purpose.php](http://www.sfgfta.org/about/history_and_purpose.php)

<sup>15</sup> <http://www.downtownyonge.com/resources/Downtown%20Yonge%20BIA%20Music%20Strategy.pdf>

<sup>16</sup> <https://www.premier.vic.gov.au/24-hour-public-transport-to-get-you-homesafe/>

is part of a community revitalization project in the Soulsville USA Music District.<sup>17</sup> The City of Toronto and TMAC should jointly explore opportunities to embark on a similar project, and should consider partnerships with the private sector to help bring this ambitious concept to fruition.

### 3. Support music education.

School is often where a passion for music is ignited, and even if that spark does not lead directly to a career in music, it can be the source of a lifelong appreciation for and love of music. Music education is the birthplace of our future stars and the appreciative audiences who financially support their careers. Accessible music education levels the playing field for those whose economic realities too often result in a lack of cultural opportunities. Moreover, music can be a bridge-builder in neighbourhood improvement areas.

Our music history includes trailblazers from Glenn Gould to 16-year-old Tony Yang, who recently became the youngest medallist ever in the International Chopin Competition. Our current history includes some of the top artists of today including Drake, The Weeknd, and MAGIC!. All of these musicians learned or honed their craft in Toronto and all have reached international levels of excellence.

In the public consultation, 92% of respondents agreed that music should be a bigger part of the education system in Toronto -- the highest positive response rate of any question asked in the survey. The City can assist in advocating that music programs focused on performance, the business of music, and music appreciation are available throughout Toronto. This initiative can include making music part of the school curriculum, and creating or enhancing after-school or community-based music activities.

- **Music education forum** - The City should convene a forum of music education stakeholders to assess the current state of music education in Toronto and create a new vision and strategies for enhancing it. Along with representation from the four French and English school boards, the forum should include community-based organizations that are already supplementing school curricula or providing music education outside of schools, including Prologue to the Performing Arts, MusiCounts, the Coalition for Music Education, Sistema Toronto, Share the Music, the Royal Conservatory, People for Education, Blues in Schools, Mariposa in the Schools, the Canadian Opera Company, Manifesto, the ReMix Project, the Toronto Symphony Orchestra, Regent Park School of Music, the Beat Academy, Inner City Angels, and TEMPO. The forum should consider implementation of non-traditional pedagogy, and how the professional music sector can play a role.
- **Provincial funding** - While education is under provincial jurisdiction, the City should be active in discussing with the Government of Ontario an increase in funding to education, especially arts education.
- **Funding & spaces** - The City can assist in creating access for music education throughout Toronto by providing free or low-cost spaces and allocating funding and/or securing partners for music programs. Portland, Oregon implemented a \$35 annual tax per household to guarantee arts programs in every public school in the city, which received overwhelming support in a citywide referendum. Toronto can consider a similar initiative to safeguard existing school music

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<sup>17</sup> <http://www.memphislimhouse.com/1/About>

programs and expand current offerings, paying special attention to providing relevant music programs for at-risk youth. The existing Neighbourhood Improvement Areas infrastructure could be utilized for directing funding.

- **Relevance & diversity** - Beyond increasing access to music education, the City can advocate that education program content reflect the diversity of Toronto's music sector, with studies encompassing hip hop, beat-making, remixing, and other current genres including socially conscious music, while also exposing students to non-performing career opportunities in music. The Toronto Strong Neighbourhoods Strategy 2020 could be used to help define and create relevant programming and actions.

#### 4. Promote Toronto's music scene locally & internationally.

The City has a vital role to play in promoting Toronto's music scene, both to Torontonians and to the world at large. The goal is twofold: to build audiences for our local creators across all genres and cultures, increasing their earning potential locally and beyond; and to enhance Toronto's national and international standing as a music destination, growing music tourism and business relocation and their spillover benefits across many sectors. The City can support these objectives as follows:

- **Music Tourism** – In 2015, Toronto attracted over 40 million visitors (overnight and same-day), who spent over \$7 billion locally.<sup>18</sup> Toronto can make music a drawing card for tourists , providing them with a reason to extend their visits. The City of Toronto, working through its own Tourism and Visitor Services unit of Economic Development and Culture, and in collaboration with Tourism Toronto, can ensure that music is part of these visitors' Toronto experience. Together, these groups can promote Toronto's music scene outside the city, create online resources to connect tourists with the music they love, and work with the hospitality sector to ensure concierges, waiters, taxi and transit drivers, and tourist information staff are able to offer informed recommendations.
  - Toronto musicians and groups that tour nationally and internationally enhance Toronto's identity as a cultural capital and its appeal as a tourist destination; Tourism Toronto could help create awareness of these artists' tours.
  - Tourism Toronto, TMAC, and the City should explore opportunities to partner with Toronto's transit gateways (for example Lester B. Pearson and Billy Bishop Airports, Union Station) to create a greater sense of arrival tied to music.
- **Celebration of our music history** – Toronto has an unmatched music history. The city has played a central role in developing and nurturing world-renowned artists across multiple genres: classical, jazz, folk, reggae, and rock, and increasingly, pop, electronic, and urban music. For decades, Toronto's iconic venues have hosted internationally famous acts and performances.
  - Melbourne, Australia commemorates its music history with the naming of downtown alleys, including colourful murals; the City of Toronto could consider similar initiatives building on the 2015 unveiling of Reggae Lane in Toronto, our existing Heritage Toronto plaque program, historical designation of buildings, and the musicians currently recognized as part of Canada's Walk of Fame.

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<sup>18</sup> <http://media.seetorontonow.com/press-releases/2016/record-tourism-arrivals-and-spending-bolster-toronto-regional-economy/>

- The music history-themed walking tours currently offered in Yorkville and on Yonge Street could be expanded to cover other significant areas, including those outside the downtown core. These tours could be enhanced with the development of a web presence and a mobile app.
- Private-sector music sites could be incorporated into Open Doors Toronto.
- TMAC could also explore creating a local music history program to be incorporated into school curricula.
- **Creation of a Toronto Music landmark** – A logo, wordmark, and social media hashtag to reinforce the awareness of Toronto as a great Music City would not only be used by the City in promoting its own directly produced music initiatives but also adopted by local industry and fans in their own online conversations about and promotion of private-sector music events. The huge success of the TORONTO sign introduced during the Pan Am Games shows the power of the right landmark. TMAC should adopt one or more social media hashtags to coalesce online conversations about Toronto’s music scene. (For example, TMAC is already encouraging the use of #TOMusic and #torontomusic to create conversations through social media.)

## 5. Alliances with other music cities

In 2013, the City of Toronto and Austin, Texas entered into the world’s first formal Music City Alliance. This Alliance was renewed in 2015 with goals to create music industry trade and export, foster ongoing communication, and create mutual growth opportunities. Since then, other cities around the globe have approached Toronto to initiate new partnerships or expand existing relationships, including Chicago, Seattle, and New York in the U.S.; Melbourne and Sydney in Australia; and Mannheim, Germany. In the public consultation, New York and Nashville were frequently mentioned as alliance targets that most closely align with Toronto’s music business in terms of scope and genre representation, and are geographically close enough to facilitate artist and business exchanges.

The City of Toronto, through TMAC’s International Alliances working group and through fostering its own direct relationships, should explore opportunities for formal and informal music alliances with Canadian, U.S., and international cities, in order to:

- increase trade and export for local music businesses
- create opportunities for Toronto talent abroad
- share learning and best practices with other music-friendly cities
- cross-promote music tourism

Furthermore, the City should consider allocating funds to support the success of existing and potential music alliances and the initiatives they can enable - for example, business networking summits involving industry leaders. TMAC and the City should jointly explore opportunities to inform the public of the tangible benefits of Toronto’s music city alliances.

## 6. Research & Monitoring

Currently, there is no comprehensive measurement of the scale, scope, and impact of Toronto’s music sector. In order to ensure continued political and public support for the sector, the City – through the Economic Development and Culture division – and TMAC’s Strategic Planning working group should

help to coordinate an up-to-date measurement of the industry. This state-of-the-nation snapshot of the Toronto music industry can be used to help advance sector goals with public and private partners and will serve as a benchmark against which to demonstrate measureable results with a follow-up study in the next 3 to 4 years. Target metrics could include:

- the number of live venues, music festivals, and other music businesses
- employment figures across all measurable components of the music industry
- the number of music creators making their home in Toronto (and, if possible, average income from music-based activities)
- revenue and tax contribution from music businesses and not-for-profit organizations
- the impact of music tourism in Toronto
- the overall impact of Toronto's music sector on Toronto's economy in terms of direct economic activity and total economic impact
- the opportunities for youth engagement in the music community and for this engagement to facilitate ongoing entrepreneurial success
- the cultural and demographic diversity of our music sector, and the visible representation of this diversity across the Toronto industry in general

In their research, the City and TMAC may seek to collaborate with public- and private-sector partners collecting similar data for their own studies, including agencies of the provincial and federal governments, Music Canada, Music Canada Live, the Canadian Independent Music Association, SOCAN, and others with reliable, relevant information.

Data collected in this research project should be made public as much as privacy and proprietary considerations allow. Further, this sector information should be monitored and refreshed as often as feasible.

## Conclusion

Toronto is blessed with an enviable music scene, with a range of live venues, festivals, record labels, agencies and management companies, promoters, industry organizations, educational institutions, media, and working musicians that very few other cities can equal. Further, Toronto's music sector now enjoys the engagement of City Hall through the activities of the highly involved Toronto Music Advisory Council, the efforts of motivated City staff, and the support of elected officials who appreciate the value and impact of music. And with unprecedented annual funding permanently guaranteed to the sector through the Government of Ontario, Toronto's music industry stands ready to make strides that will place the city at the very forefront of the world's music capitals.

Toronto's music industry is poised for tremendous growth: growth as a driver of employment, direct economic activity, and economic impact; as a powerful catalyst for cultural inclusivity and youth engagement; and as a powerful contributor to civic identity and tourism. If, however, Toronto fails to take full advantage of today's opportune conditions to make committed and cohesive moves in strengthening and supporting its music industry and the artists at the core of this community, the city risks losing recently generated momentum, the engagement of the music industry, and perhaps many of the artists themselves - and will ultimately be a "music city" in name only.

Therefore, the active leadership of the City is key in achieving music-sector enhancement and expansion. In recognition that funding may be required for many of the TMAC recommendations

outlined in this Music Strategy, the City of Toronto should consider allocating funds in its 2017 budget to support its stated aspirations toward becoming a more fully realized music city. The City might also consider matching a percentage of any funding received from private sector sponsorship of music-themed initiatives recommended in this Strategy.

Together, the City, the members of TMAC, the music community, and the public can create unprecedented economic and cultural benefits for the music sector and for Toronto at large. It is hoped that this Music Strategy will serve as a blueprint for this growth.



## Appendix 1: Toronto Music Advisory Council

The Toronto Music Advisory Council provides a forum for the exchange of ideas, and input and advice on the challenges and opportunities for the city's music industry.

In accordance with the Terms of Reference, the Music Advisory Council is composed of 36 members, including the Chair of the Economic Development Committee; one other Member of the Economic Development Committee; four other Members of Council-at-large; the Executive Director, Toronto Association of Business Improvement Areas, or designate; the President & Chief Executive Officer, Tourism Toronto, or designate; and 30 music industry stakeholders collectively representing a range of knowledge, skills and experience:

Member Name	Affiliation
Councillor Michael Thompson (Chair)	City of Toronto
Councillor Shelley Carroll	City of Toronto
Councillor Josh Colle	City of Toronto
Councillor Gary Crawford	City of Toronto
Councillor John Fillion	City of Toronto
Councillor Mike Layton	City of Toronto
Eric Alper	eOne Music Canada
Derek Andrews	Luminato Festival
Vivian Barclay	Warner Chappell Music Canada Ltd.
Mary An Blom	Sony Music Entertainment Canada
Daniel Broome	Toronto Musicians' Association
Jeff Cohen	Collective Concerts
Jeff Craib	The Feldman Agency
Sari Delmar	AB co.
Jay Douglas	Independent Artist
Justin Erdman	Rogers Media

Toronto Music Strategy

Murray Foster

Adam Gill

Graham Henderson

Drex Jancar

Andreas Kalogiannides (Co-chair)

Che Kothari

Jesse Kumagai

Rob Lanni

Alexander Mair

Amanda Martinez

Mervon Mehta

Noah Mintz

Miranda Mulholland

Rodney Murphy

Errol Nazareth

Jeffrey Remedios

Zaib Shaikh

Roberta Smith

Spencer Sutherland

Mike Tanner

Patti-Anne Tarlton

Andrew Weir

Independent Artist

Embrace Presents

Music Canada

OVO Sound & The Remix Project

Kalogiannides Law

Manifesto Community Projects

Live Nation

Coalition Music

MHL Communications

Independent Artist

The Royal Conservatory of Music

Lacquer Channel

Independent Artist

SOCAN

Multimedia Journalist

Universal Music Canada

City of Toronto

Toronto Symphony Orchestra

Queen Street West BIA and Board Member, TABIA

City of Toronto

Ticketmaster

Tourism Toronto