

MUSIC INDUSTRY STRATEGY



2022 - 2026

CONTENTS

Executive Summary	1
Introduction	2
Assessment	3
Strategy	4
Introduction	5
Mandate and Methods	6
What is the Music Office?	7
Toronto's Music Industry in 2022	8
About Toronto's Music Industry	9
Toronto's Industry by the Numbers – A Snapshot	10
The Impacts of a Thriving Music Industry	11
The Impact of Global Trends on Toronto's Music Industry	12
Impacts of COVID-19 on Toronto's Music Industry	13
The Strategic Framework	14
Conditions of Success	15
Visibility & Connectivity	18
Professional Development Opportunities	19
Supportive Local Government	22
Economic Opportunity	25
Spaces to Practice and Perform	28
Music in Toronto A Summary Assessment	31
Strategic Directions	32
What Does the City Control?	33
What Doesn't the City Control?	34
Strategic Directions	35
Directions Summary	42
Appendix	43
Survey Results	44
Interviewee List	56
Jurisdictional Review	57



EXECUTIVE SUMMARY

Executive Summary

INTRODUCTION

Building on the Toronto Music Advisory Committee's (TMAC) [Toronto Music Strategy: Supporting and Growing the City's Music Sector](#) (2016), this strategy provides direction to the City of Toronto's Music Office from 2022 to 2027. To do so, Nordicity, a Toronto-based consultancy, conducted interviews, round tables and an online survey with key industry stakeholders, including TMAC.

Toronto's Music Industry

Toronto is home to a vibrant and varied music industry that draws upon the city's diverse communities, featuring:

- 18,000+ SOCAN-registered music artists
- 450+ places to enjoy live music
- 75+ festivals focused around music
- 35 listed concert / music event promoters
- 60+ not-for-profit music presenters / producers and community music ensembles
- 25+ live event production companies
- 75 record labels
- 85 listed recording studios
- 60+ music publishing, licensing and distribution companies
- 80+ artist management, booking, or publicity firms
- 35+ music industry advocacy / support organizations

OBJECTIVE

The overall objective of the strategy is to enable the Music Office to facilitate industry growth in Toronto's vibrant yet challenging music industry, ultimately leading to increased economic activity, placemaking and inbound tourism.

A global industry, Toronto's music ecosystem is adapting to trends including: the ongoing impact of the COVID-19 pandemic, the rise of the artist entrepreneur, live music venue challenges, growth in music streaming revenue, high valuations for music rights, widespread calls-to-action for greater equity, diversity and inclusion, experimentation with new digital tools and increased opportunities for crossovers with interactive digital media. It is in this context that the City's Music Office must operate to support the industries as it overcomes challenges and seizes opportunities presented by these trends – and others that may yet emerge.



Executive Summary

ASSESSMENT

Strategic Framework and Assessment

Research into music industries in other jurisdictions – and interviews and surveys conducted with Toronto stakeholders – identify five key conditions required for a city's music industry to succeed.

Drawing on interviewee insight, survey responses and desk research, Nordicity assessed the City's music industry against each condition of success.



Space to Practice & Perform

Challenges

- Maintaining enough rehearsal and performance space
- Accessing small and mid-sized spaces, as well as those for hip-hop, R&B and pop
- Ensuring safety at events

Opportunities

- Use of City-owned spaces as rehearsal spaces
- Better use of outdoors spaces (e.g., parks, patios)
- More flexibility in City bylaws
- Support for venue sustainability



Economic Opportunity

Challenges

- Contending with the high cost of living and working
- Overcoming the effects of the COVID-19 pandemic on the live music scene
- Bridging gaps between levels of government

Opportunities

- More use of public space
- Better marketing of the industry, incl. export-ready artists
- Leveraging Toronto's other creative industries



Visibility & Connectivity

Challenges

- Finding and building audiences
- Connecting to other parts of the industry
- Building relationships with adjacent industries (e.g. film/TV)

Opportunities

- More use of public space
- Better marketing of the industry, incl. export-ready artists
- Leveraging Toronto's other creative industries



Professional Development Opportunities

Challenges

- Developing music-specific business skills, especially for start-ups and emerging artists
- Making students aware of potential music industry careers

Opportunities

- New cross-disciplinary training programs
- Experienced industry members willing to share
- Strong interest in the future of music technology



Supportive Local Government

Challenges

- Navigating the regulatory framework for music events
- Addressing civic issues (e.g. TTC hours)
- Increasing awareness of the Music Office and TMAC

Opportunities

- Better support for the night economy
- Clearer communication on regulatory processes
- Updated zoning and licensing
- Better (temporary) use of City-owned space

Executive Summary

STRATEGY

Strategic Directions

Based on the assessment, six strategic directions were established to guide the Music Office's activities over the next five years. Each direction is presented with a selection of potential actions (below):

Strategic Directions	Summary of Potentials Actions
Enhance Connectivity to Create Opportunities	<ul style="list-style-type: none"> Foster connections within the music industry for knowledge-sharing and partnership and with national, global and digital markets for business and export opportunity Connect to other industries to increase opportunities, prioritizing the creative industries and tourism
Ensure Strong Presence and Influence for the Industry in Municipal Programs and Policies	<ul style="list-style-type: none"> Advance the interests of the music industry by involving the Music Office in key policy or programming initiatives at City Hall Advance understanding of the unique needs of the music industry in order to better streamline, adapt and communicate City processes and systems to support the industry
Facilitate Varied, Accessible Space	<ul style="list-style-type: none"> Explore the use of City-owned assets by cultural organizations Explore City policy and regulations that support the retention or growth of space, including areas outside the downtown core Develop the use of space to support night economy initiatives
Create paid performance opportunities for local musicians	<ul style="list-style-type: none"> Continue and expand City Hall Live and other Music Office programming and community partnerships, encouraging cultural and geographic diversity Support private-sector organizations providing artist performance opportunities
Advance Professional Skills of the Creative Music Workforce	<ul style="list-style-type: none"> Foster opportunities to provide business skills that advance marketing/promotion, financing and funding, company growth, digital sales, contract negotiation Assist efforts to provide information and guidance for young people entering the industry
Advocate with Other Levels of Government	<ul style="list-style-type: none"> Communicate sector concerns on financial sustainability, funding, copyright, insurance, artist quality of life and other issues as needed

INTRODUCTION

Introduction

MANDATE AND METHODS

Building on the Toronto Music Advisory Council's (TMAC) Toronto Music Strategy: Supporting and Growing the City's Music Sector (2016), this document sets out a strategy for the Toronto's music industry from 2022 through 2027. In doing so, it provides direction to the City of Toronto and

its Music Office on how to enhance the success of Toronto's music industry while addressing key challenges affecting prosperity and sustainability. The strategy aligns and integrates with similar strategies developed by the City as a whole and its Economic Development and Culture Division.

The Nordicity team worked closely with City staff and TMAC members in the preparation of this document, using several methods:

- 23 individual interviews were conducted with musicians/artists, venue owners, music managers, agents, record label representatives, recording studio operators, community activists, music advocates, streaming service representatives, festival and event organizers, Toronto Music Advisory Committee (TMAC) members and representatives from various City of Toronto divisions.
- TMAC members were engaged in a roundtable in November 2021, to ensure early engagement from the committee.
- In December 2021, a public survey was launched to invite artists and music businesses to provide feedback on how the City's Music Office can better support Toronto's music industry. The survey elicited 1,069 total responses.
- Research on initiatives and programs related to the music industry in other jurisdictions was carried out to gain insight into how other municipalities and regions address challenges and opportunities. Jurisdictions reviewed include:

Europe

- Berlin, Germany
- London, England
- Nantes, France
- Reykjavík, Iceland

Australia & New Zealand

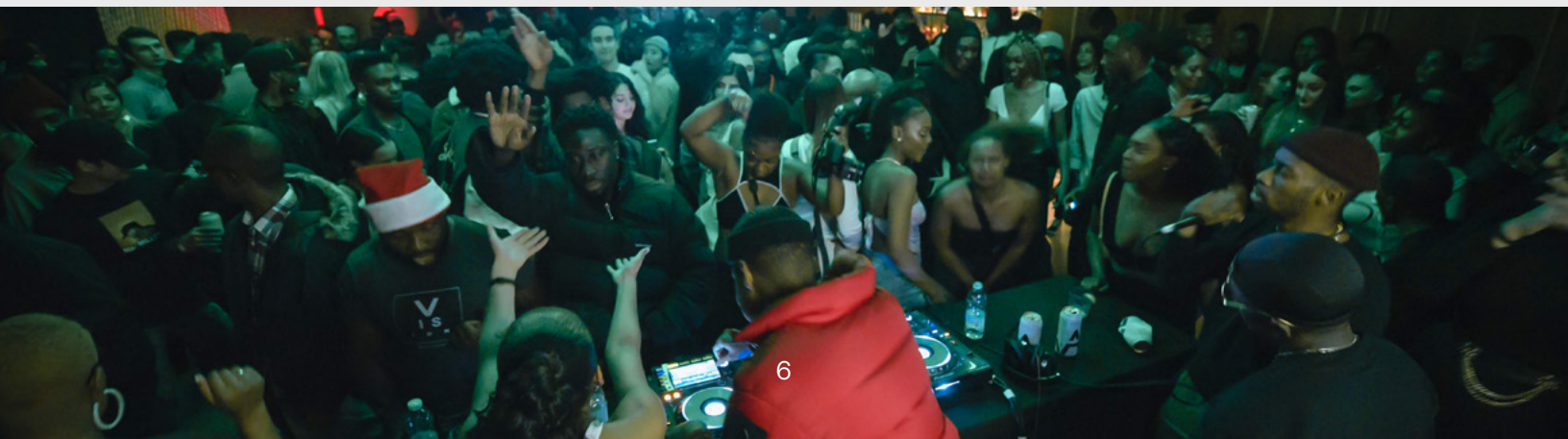
- Auckland, New Zealand
- Sydney, Australia
- State of Victoria

United States

- Austin, Texas
- Denver, Colorado
- New York City, New York
- San Francisco, California
- Seattle, Washington

Canada

- Barrie, Ontario
- Halifax, Nova Scotia
- Hamilton, Ontario
- London, Ontario
- Ottawa, Ontario
- Surrey, British Columbia
- Winnipeg, Manitoba



Introduction

WHAT IS THE MUSIC OFFICE?

The City of Toronto's Music Office (a unit of Film and Entertainment Industries, Economic Development and Culture) exists to support the city's music community in a variety of ways.

The Music Office represents the interests of Toronto's music industry and musicians at the municipal table. This means liaising between music stakeholders and policymakers and relevant divisions at City Hall, helping the industry navigate city government and fostering the business of music in Toronto.

The Music Office also helps create paid performance opportunities for artists through programming initiatives and fosters partnerships with music organizations across the city.

The Music Office's role includes:

- Advising on policy development
- Recommending city support for music and musicians
- Advocating for the interests of musicians and the music industry at City Hall
- Creating paid performance opportunities for local artists
- Providing information, advice and business to business connections for the music sector
- Helping curate professional development for emerging artists and grassroots industry



TORONTO'S MUSIC INDUSTRY IN 2022

Toronto's Music Industry in 2022

ABOUT TORONTO'S MUSIC INDUSTRY

Toronto is Canada's largest city and the country's economic powerhouse. It is also the cultural capital of English Canada, the focal point of the Canadian music industry and the home of most of the Canadian sector's major players.

Musicians are at the heart of any local music scene and a vital part of Toronto's cultural fabric and civic identity. As perhaps [the world's most diverse city](#), Toronto has a long history of producing leading artists and composers across a range of genres and styles, drawing from cultural communities around the city. An extensive and varied grassroots network of performers, songwriters, producers and creative innovators continues to generate global superstars while attracting new talent from around the world.

Toronto's music ecosystem is vast and varied, encompassing organizations from every part of the sector: major record companies and a wide variety of independent record labels; major multi-national music publishing companies and a growing number of successful independent music publishing entrepreneurs; top-level recording studios, artist management, agencies and public relations firms; community-based music organizations; live event production; nationally recognized annual music awards events; instrument retailers and record stores; business supports like law

and accounting; national music advocacy and arts councils; comprehensive music education; stylistically diverse radio stations; informed and engaged multi-platform music media; and highly evolved complementary creative industries like photography, video, fashion and design, film and TV and interactive digital media.

Toronto's live music scene remains strong despite recent venue losses due (in part) to a decade of sharply rising land values, intense property redevelopment in the downtown core and the extraordinary challenges of the COVID-19 pandemic. A "venue ladder" that ranges from small grassroots spaces up to globally renowned concert halls – as well as an annual calendar of stylistically diverse music festivals and events – offers local artists performance opportunities for every stage of career development and provides local audiences with a mix of emerging Toronto talent and international touring acts.



Toronto's Music Industry in 2022

TORONTO'S INDUSTRY BY THE NUMBERS – A SNAPSHOT

Toronto's music ecosystem encompasses:

- 18,000+ SOCAN-registered music creators, composers, beatmakers and lyricists
- 450+ places to enjoy live music, including
 - approximately 100 venues regularly featuring music
 - occasional, alternative and community spaces
 - frequent outdoor music sites
- Numbers from live music venue operations:
 - \$850M in annual contribution to the City's GDP
 - 10,500 full-time equivalent jobs from live music venues alone
 - 75+ festivals focused around music
- 35 listed concert / music event promoters
- 60+ not-for-profit music presenters / producers and community music ensembles funded by the Toronto Arts Council
- 25+ live event production companies
- \$150M+ in overall annual live music ticket sales
- 75 record labels - major, independent and specialty
- 85 listed recording studios
- 60+ music publishing, licensing and distribution companies
- 80+ artist management, booking, or publicity firms
- 35+ music industry advocacy / support organizations



Toronto's Music Industry in 2022

THE IMPACTS OF A THRIVING MUSIC INDUSTRY

A stable and sustainable music industry generates several positive outcomes:

- **Economic Impact:** Music is a labour-intensive industry, with a high percentage of company expenditures directed to wages and salaries. Beyond providing direct employment, the music sector pays business taxes and creates jobs and spending in other sectors such as entertainment and hospitality, transportation, fashion and design, digital media, advertising and promotion, finance and legal. Music also impacts film, television and live events.
- **Placemaking:** An energetic and visible music sector contributes to a city's sense of vibrancy, engagement and livability, which in turn grows local spending and attracts talent across industries. Music defines a city's cultural fabric and its identity on the global stage. It also unites communities while celebrating diversity. Music is a leading cultural export for Toronto, which has a long history of producing world-famous music talent.
- **Tourism:** Large-scale music festivals, conferences and events are obvious drivers of tourist visits – but so too is a vibrant music ecosystem that includes grassroots music venues, alternative music spaces and industry assets like recording studios. Recognizing and celebrating the origins of globally famous musicians can also generate interest in local sites and drive tourism. Together, these assets can attract hundreds of thousands of tourists annually – and generate repeat visits for years to come. Of course, these visits lead to associated economic benefits such as spending on hotels, restaurants, retail and transit.



Toronto's Music Industry in 2022

THE IMPACT OF GLOBAL TRENDS ON TORONTO'S MUSIC INDUSTRY

Global trends that affect Toronto's musicians and music industry include:

- **The rise of the artist entrepreneur:** The democratization of technology and decreasing costs have led [more artists to self-produce](#) and distribute via third-party platforms. This trend has changed the dynamic between artists and labels in how production and distribution services are provided.
- **Live music venue challenges:** Partly due to the COVID-19 pandemic, many jurisdictions in Canada, Europe and the U.S. have seen exacerbated pressure on local venues, reducing performance opportunities and revenue generation for artists. (City data indicates that approximately 15% of Toronto's venues permanently closed in 2020-2021.) Prior to the pandemic, rising land values and development pressures threatened the sustainability of cultural spaces of all types. Additionally, there are issues around safety in some venues, including concerns around [sexual harassment at music events](#).
- **Growth in music streaming:** [Streaming service popularity continues to climb](#) as other forms of revenue generation from recorded music decline. For artists, though, streaming revenues do not balance the financial loss of unit sales and only high-profile talent can rely on streaming as a substantive source of income.
- **High valuations for music rights:** In part, due to platforms like TikTok that can help young audiences discover older song catalogues, major labels, publishers and investment companies are [competing for the rights to songs](#) with proven track records, renewing interest in the economic potential of music rights.
- **A widespread call-to-action for greater equity, diversity and inclusion:** Across the globe, issues around [exploitation and inequities](#) in the industry have come to the forefront, particularly for Black artists, but also for groups including Indigenous people, other racialized individuals, women and 2SLGBTQ+.
- **Experimentation with new digital tools:** The emergence of [NFTs and blockchain](#) continues to spur conversation around improving payments for artists on streaming platforms. AI is also increasingly being used in the creative process, while there is a [shift towards immersive audio](#), with growing access to compatible hardware and increased demand.
- **Increased crossover in interactive digital media:** There is growing experimentation in relation to the concert experience. [In-game concerts have emerged](#), offering a way to generate revenues beyond what is possible in-person. This avenue is only available to high-profile talent at present. Similarly, [mixed reality \(XR\) is beginning to be used in creating virtual-live concerts](#) and festivals, as well as in marketing tactics.

Toronto's Music Industry in 2022

IMPACTS OF COVID-19 ON TORONTO'S MUSIC INDUSTRY

The COVID-19 pandemic has presented many new challenges for the Toronto music industry, exacerbated pre-existing trends – and underscored a need for innovative thinking to help create a more sustainable long-term future.

- **Income challenges:** As a result of lockdowns and restrictions, many artists have been unable to perform live and tour. Government relief benefits such as the Canadian Emergency Relief Benefit (CERB) and Canada Recovery Benefit (CRB) have helped sustain many throughout the pandemic; however, eligibility requirements, application processes and timelines and overall financial uncertainty have seriously affected artists and grassroots industry.
- **Ongoing venue closures:** Throughout the pandemic, live music venues have had to close their doors, some permanently. Closures have occurred across Canada and globally, with unprecedented financial impacts on venue owners and staff, as well as artists, industry and related businesses.
- **Live music venue insurance:** Venues that have survived the pandemic have been further threatened by steep cost increases for commercial insurance. Many have been unable to secure liability insurance at all or been required to accept unfeasible conditions or exclusions. As a result of this, some venues are not fully insured and remain susceptible to bankruptcy and closure.
- **Lost income and opportunity for artists:** As a result of the pandemic, pre-existing challenges with affordability have become more pronounced for many artists – leading many to consider living and working outside of Toronto or leaving the music industry entirely. Retaining and growing Toronto's artist community will require broad, creative exploration of how musicians can generate revenue and build sustainable careers.

Recovery

To address challenges associated with the pandemic, the City of Toronto has established initiatives, recommendations and plans for recovery. These initiatives will have an impact on the music industry and include:

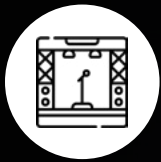
- **Toronto Office of Recovery and Rebuild (TORR):** established in April 2020, to engage with Torontonians on a citywide approach for recovering and rebuilding from the COVID-19 pandemic.
- **Build Back Stronger:** adopted by Council in December 2020, it includes 18 recommendations grouped into four priority areas for action: economic recovery, anti-racism and inclusion, workforce development and talent and arts and culture.



THE STRATEGIC FRAMEWORK

CONDITIONS OF SUCCESS

Research into music industries in other jurisdictions – and interviews and surveys conducted with Toronto stakeholders – identify five key conditions required for a city's music industry to succeed:



Space to Practice & Perform



Economic Opportunity



Visibility & Connectivity



Professional Development Opportunities



Supportive Local Government

*These are not in order of priority

The Strategic Framework

VISIBILITY & CONNECTIVITY | ABOUT



A successful local music industry is closely interconnected and linked to the broader international music ecosystem, relevant creative industries and local and national governments.

A successful music industry also positively impacts residents and visitors alike, through how the industry is perceived and in how the public accesses information about music performances, artists, venues and the industry in general.

A robust and visible music industry supports diversity and inclusion that encourages citywide vibrancy and community engagement. A thriving music sector attracts and retains creative artists and entrepreneurs, businesses, new residents and visitors.

Impacts:

- Greater ability for the industry to speak with a single voice
- Greater economic opportunity with external markets and adjacent industries
- Increased ability to share best practices and experiences
- Positive community relations and public recognition of the importance of music and musicians
- Increased resident and visitor spending on music



The Strategic Framework

VISIBILITY & CONNECTIVITY

I COMPARABLES



The following examples illustrate how other jurisdictions are approaching visibility and connectivity.

Networking and Events

Many jurisdictions provide opportunities for frequent and consistent networking opportunities and connections to be made across the music industry and within other creative industries.

- **BMC Backstage (Berlin Music Commission):** A networking event for the music business in Berlin with a main focus on reaching out to other creative industries including fashion, film, design, games and print.

Local Attraction

Jurisdictions encourage opportunities to inspire locals and tourists to explore and appreciate local music venues and musicians.

- **Pop im Kiez/“Pop in the Neighbourhood” (Musicboard Berlin):** A fund that supports projects in the form of a pilot project, a campaign or other interventions that promote a specific genre of music in a particular neighbourhood in Berlin. Aims to address the “displacement of subcultural spaces in Berlin” and make “scene-based” music communities and networks stronger in neighbourhoods, while ultimately positively impacting clubs and music venues.

International Alliances and Partnerships

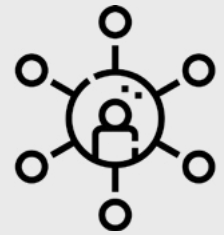
Jurisdictions partner with each other to provide cross-collaboration opportunities for artists.

- **Nantes <> Reykjavik Cross Residency for Musicians (The Institut français, the City of Reykjavik, the City of Nantes, Iceland Music, Mengi [Reykjavik] and Trempo [Nantes]):** A program that offers opportunities for artists living in both regions to work, create and produce music for a period of two to three weeks in the other region. The goal is to build future collaborations between the artistic communities of the two cities.

Awards and Recognition

In order to foster a sense of support and community – and acknowledge local talent – many jurisdictions have established music awards, such as Music Awards Victoria (AUS) and Music Nova Scotia Awards.





VISIBILITY & CONNECTIVITY | ASSESSMENT

OVERALL:

Toronto is home to a vibrant music community and passionate industry leaders who champion local talent. The music community will benefit further from enhanced connections with other creative industries, less internal siloing, more public recognition of its activities and more engagement in City Hall's work in supporting music and musicians.

Key Opportunities:

- The City could encourage more use of public space, including space outside the downtown core, to give artists platforms to perform and to encourage audience engagement and post-COVID recovery.
- There is potential in leveraging the City for greater marketing and promotion of Toronto's music industry, including for export-ready artists needing to gain national traction and international exposure, in US markets and beyond.
- The City can convene organizations to enhance communication and collaboration.
- The City can connect the music industry with the film and TV, advertising and interactive digital media sectors to increase career options.

Key Challenges:

- Many artists – particularly emerging artists – find difficulty in gaining traction and building audiences. This challenge has been exacerbated by the COVID-19 pandemic.
- There is a need for more general connectivity within the music industry, including a desire for more connection between artists and key music businesses such as booking agencies, management and public relations.
- More connections among not-for-profit music organizations would help address unnecessary competition for the same resources and duplication of efforts.
- A tighter relationship between music and adjacent industries such as film, advertising, video games and other screen-based media is needed.



The Strategic Framework

PROFESSIONAL DEVELOPMENT OPPORTUNITIES | ABOUT



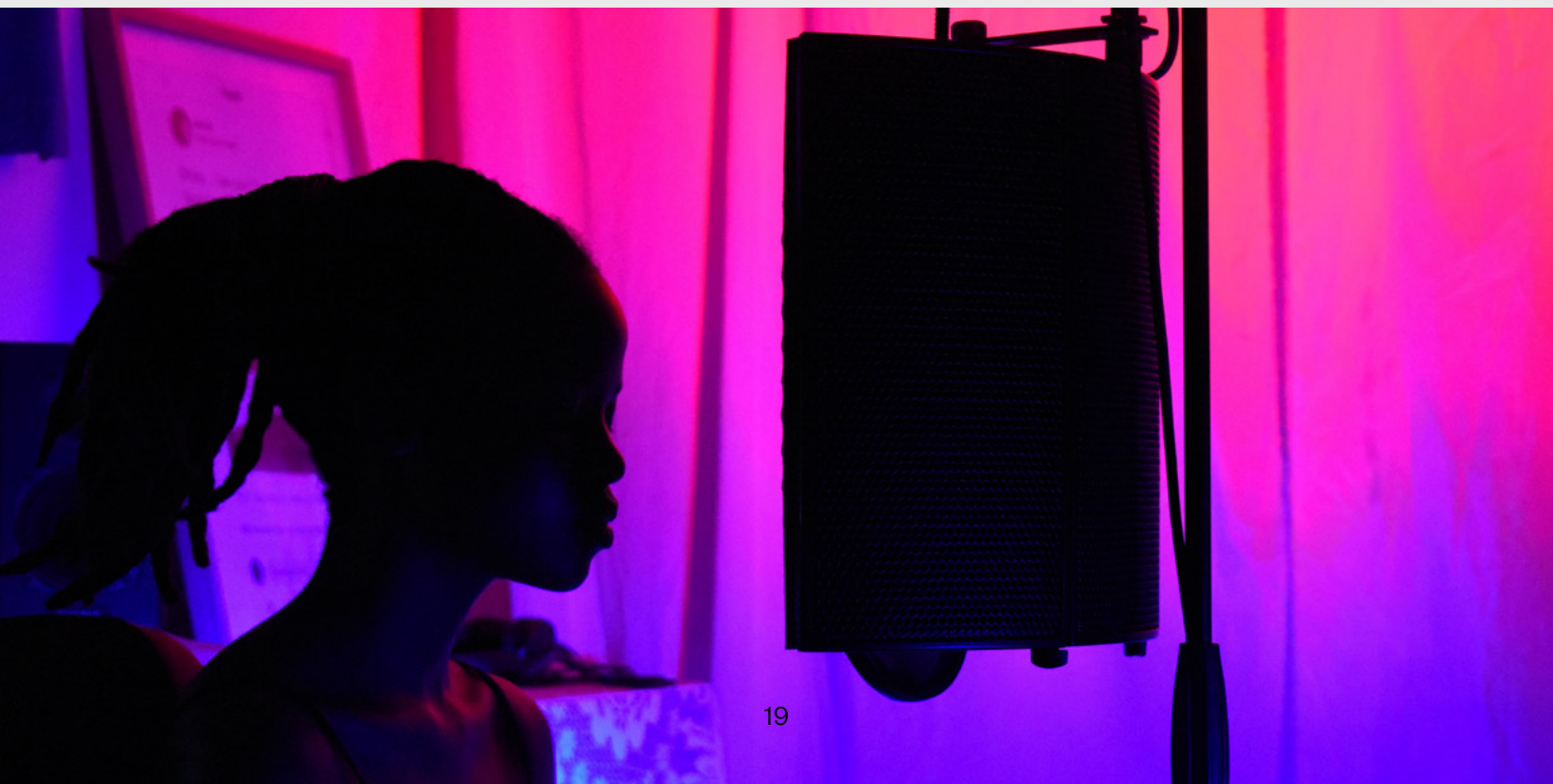
To achieve sustainable career success, artists and others working in the music industry must develop varied skills beyond just music. Those skills include, but are not limited to:

- Business skills – ranging from basic financial literacy to more complicated issues like rights management, business planning and grant writing
- Community management skills – used to attract, maintain and monetize audiences
- Digital skills – complements all of the above and also includes mastery of new music-focused technology, as well as avenues for marketing

Typically, such skills are developed by a mix of training, use of self-directed resources and experience.

Impacts:

- Ability to develop and support new and emerging talent
- Increased ability for artists and companies to generate revenue
- Increased likelihood for emerging artists and industry to build long-term, sustainable careers
- Enhanced development of the entire music ecosystem
- Heightened status of Toronto as a hub for experimentation and innovation in music



The Strategic Framework

PROFESSIONAL DEVELOPMENT OPPORTUNITIES | COMPARABLES



The following examples illustrate how other jurisdictions are approaching professional development:

Training and Workshops

Many jurisdictions provide training and professional development opportunities for artists and music industry professionals:

- **Experts In Residence (Victoria Music Development Office):** A program that provides small music businesses in the State of Victoria access to professional services and expert advice from business streams including legal, HR, finance, artist management, digital marketing, grant writing, strategic planning, and coaching.
- **Trempo (Nantes, France):** A unique music institution dedicated to the practice, creation, production and performance of new music. Trempo offers programs, courses, internships and workshops, and professional training modules to provide new trajectories for musicians in building lasting careers.
 - **360:** A program dedicated to career development that offers over a year of artistic support (e.g., stage residencies, accompanied rehearsals, artistic productions in the studio, concerts at national festivals, approaches to cultural action), recommendations to professionals (media, broadcasters), access to a training catalog, and use of Trempo-owned studios.
 - **Slash:** A training program dedicated to a selection of five emerging professional artists. The objective is to acquire general knowledge of the music industry, to create career management tools and to obtain the keys to understanding a constantly evolving music ecosystem.

Innovation

Accelerator programs and incubators give artists opportunities to experiment and innovate.

- **Firestarter (supported by Reykjavik Music City, Iceland Music Export and Icelandic Startups):** A music accelerator program to support music entrepreneurs by providing resources and tools to develop creative business opportunities.

Youth-Focused Opportunities

Programs and opportunities for artists to learn business skills early in their careers help them navigate the industry as they develop.

- **City of Music Career Day (City of Seattle):** A free, annual, one-day educational program that provides educational opportunities for young people, ages 16-24. The program provides direct access to music industry professionals through networking, experiential learning, engaging workshops, and performance opportunities.
- **Young Gig Makers (Auckland UNESCO City of Music):** An initiative that supports young, aspiring music event organizers and musicians to present an all-ages concert or music performance in the Auckland region. Program participants are awarded with a micro-grant plus access to in-kind technical support and equipment.

PROFESSIONAL DEVELOPMENT OPPORTUNITIES



I ASSESSMENT

OVERALL:

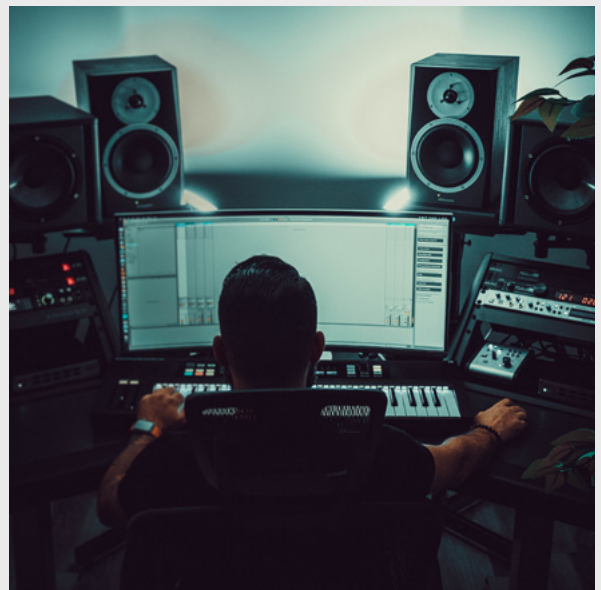
Toronto's music industry creates world-renowned content, but emerging artists and grassroots industry members have expressed a need for music-specific professional development knowledge, skills and training to fully exploit career and business opportunities. With focused business skills training, local music organizations can develop and create more and better opportunities for emerging and established artists.

Key Challenges:

- Artists are increasingly asked to operate and view themselves as entrepreneurial micro-businesses, but often lack the skills to do so.
- Artists lacking sufficient business acumen may feel they are at a disadvantage in negotiations and/or susceptible to predatory tactics. Young, emerging artists without agents, labels, management, or funding may be especially unprepared to handle business matters.
- Early-stage music industry professionals such as agents or managers would also benefit from targeted business skills training.
- Students graduating from post-secondary music programs may not be aware of the full range of career pathways in the industry – or at least not fully equipped to access and exploit these options.
- Many music programs do not include related business skills development.

Key Opportunities:

- Professional development in business skills can help develop capacity in agencies, management and PR firms and other related fields while also enhancing capabilities for artists.
- Similar professional development gaps exist in other creative industries, creating an opportunity to build cross-disciplinary training programs.
- Toronto is home to many experienced artists and music entrepreneurs who could be tapped to share their knowledge, including advice on how to access and allocate resources.
- Many in the music industry are interested in the future of technology in music, yet require funding to access the equipment to take advantage of such trends.
- Many artists and industry professionals share a desire to take advantage of opportunities around music licensing and synchronization, but lack the knowledge and the network to do so.



The Strategic Framework

SUPPORTIVE LOCAL GOVERNMENT | ABOUT



The success of the music industry is impacted by a city's regulatory and policy environment. Municipal bylaws and processes impact how businesses operate, including live venues and events and other elements of the industry infrastructure.

With a clear, easily navigated, responsive and supportive municipal framework, local live music can thrive. A municipality's efforts to support other components of the sector, including music rehearsal, recording and the business of the industry, will bolster the health of the entire connected ecosystem.

Strong connections between a city and the music industry (including musicians, local community-based music organizations and music businesses) are important in supporting any music industry.

Impacts:

- Enhanced ability to develop new events, festivals and venues – and to run existing ones smoothly and safely
- Increased public awareness of live music events and the importance of the supporting infrastructure; more industry awareness of municipal support
- Improved relationships with neighbourhood communities
- Growth of Toronto's night economy citywide, with a focus on safe, inclusive practices



SUPPORTIVE LOCAL GOVERNMENT | COMPARABLES



The following examples illustrate how other jurisdictions are supporting music through government measures.

Music-Friendly Policies

Many jurisdictions have introduced bylaws, policies and structural changes that are aimed to help musicians and live music venues.

- **Safe Occupancy Plan (Denver Arts & Venues, Denver Community Planning and Development and the Denver Fire Department):** A conditional building occupancy program for unpermitted/DIY performance venues and other creative spaces. This program was designed to ensure safety, limit displacement and allow for extended deadlines to achieve code compliance.
- **Musicians Priority Loading Zones (Seattle Office of Film and Music):** A low-cost, phased approach to make it easier for musicians to load in and load out at live music venues around the city.
- **Special Entertainment Precincts (New South Wales, Australia):** A 2021/2022 pilot project that will allow local councils to establish special entertainment precincts to boost live music and performance and help the nighttime economy grow. The government will work with City of Sydney, Inner West and Lake Macquarie councils. As part of the establishment of special entertainment precincts and changes to various laws, live music and performance venues will be able to extend trading hours and will be eligible for an 80% discount on their annual liquor license fees. The special entertainment precinct model is based on an existing structure established in 2006, in the Fortitude Valley (Brisbane).

Dedicated Online Presence and Active Social Media

Some music offices/divisions have established their own websites, as well as active social media accounts, separate from the jurisdiction's principal, centralized online presence. Examples include:

- [London \(ON\) Music Office](#)
- [Reykjavík Music City](#)
- [Austin \(TX\) Music Office](#)



SUPPORTIVE LOCAL GOVERNMENT | ASSESSMENT



OVERALL:

The Music Office is a testament to the City's commitment to supporting music in Toronto, but some City processes are not music-friendly and can impede sector sustainability and growth.

Key Challenges:

- Insufficient flexibility in the regulatory framework is a barrier to encouraging events and music infrastructure in Toronto and to retaining artists and industry.
- The difficulty in navigating complex City regulations is a disincentive to create, experiment and innovate.
- Complex, intimidating language on City webpages, forms and communications can create barriers for artists and other members of the music industry.
- Lack of clarity and consistency in the current licensing of live music venues creates challenges around operations, capacity and safety.
- Night economy initiatives can be limited by current civic issues such as TTC hours and inconsistent police event safety protocols.
- More could be done to publicize and promote the mandate and activities of the Music Office and TMAC.

Key Opportunities:

- There is an opportunity to improve infrastructure to better support Toronto's night economy across the city.
- Artists and industry would benefit from clearer, more cohesive communication of City permits, licensing and forms needed to present, perform and rehearse music and continued improvement and simplification of permitting and licensing processes.
- An updated zoning and licensing framework that accurately reflects live music venue typology and operations would ease the regulatory burden for existing venues, as well as support business retention and growth in the sector.
- Prioritizing the use of City-owned space for interim tenancy or temporary events led by music organizations would encourage new models and support diversity.



The Strategic Framework

ECONOMIC OPPORTUNITY | ABOUT



Musicians and the music industry need access to economic opportunity, which can come from a variety of sources:

- Compensation for live performance at rates that allow artists to be economically self-sufficient without being universally regulated – and are financially feasible for venues and promoters, while also reflecting their programming experience
- Access to local and global markets where music can thrive, both live performance and digital/virtual
- Connections between artists and major music companies (major record labels, agencies, management)
- Connections with a city's tourism and events infrastructure and with other aligned creative industries

Impacts:

- More opportunities for artists to enhance their income
- Ability to leverage and grow brands and products in digital and global markets
- Healthier music companies
- Greater tourism spending
- Greater cross-pollination of music across other entertainment industries



The Strategic Framework

ECONOMIC OPPORTUNITY | COMPARABLES



The following examples illustrate how other jurisdictions are approaching economic opportunity.

Fair Payment for Musicians

Jurisdictions are advocating for fair payment of musicians for their live music performances:

- **Musicians Fair Payment Policy (Hamilton City Council):** In June 2021, a policy was approved that supports and increases community awareness about the importance of paying musicians fairly for their performances.

Opportunities in Aligned Creative Industries

Jurisdictions offer programs for artists to increase their economic opportunities through collaboration and fostering networks with other creative sectors.

- **Equaliser (EQ) (Auckland UNESCO City of Music and Women In Film & Television and supported by the NZ Music Commission, NZ On Air, Sony & Aputure):** A grant and a mixed workshop/seminar/network format that provides professional development, mentorship and an ongoing network support to female music and screen sector professionals. Successful musician applicants are paired with successful director applicants to produce filmed content (music video, interstitials, visualizers, etc.) to support the released music.

Opportunities in Public Spaces

Some institutions and organizations have helped to reduce barriers and provide opportunities for musicians to perform and generate revenue, in public spaces.

- **Busk in London (Found in Music, Mayor of London):** An initiative which helps to support street performers by tackling misconceptions about buskers and encouraging landowners to embrace street performances and provide appropriate space.
- **City Sounds (City of Ottawa and Ottawa Music Industry Coalition):** The City paid artists to play a series of 24 free-to-attend music performances (over three weekends in August 2021) to encourage locals to attend musical performances and explore new neighbourhoods. City Sounds also supports paid performance opportunities for Ottawa musicians eager to play for live audiences and encourages the rebound of the live entertainment sector.



ECONOMIC OPPORTUNITY | ASSESSMENT



Key Challenges:

- Although beyond City purview to directly affect, the lack of fair compensation for artists is an ongoing and widespread issue in the industry. Many artists are dissatisfied with some current models ranging from instances of low pay for performance to negligible streaming royalties.
- Partly as a result of the COVID-19 pandemic, many musicians report having few performance opportunities.
- There are gaps and disconnects in funding programs across levels of government and agencies:
- Some music organizations rely on public funding (via grants) to keep afloat, but this reliance may be a barrier to commercial success.
- Some artists and industry members face challenges in navigating various funding systems and feel that the current granting system does not adequately support new and diverse talent and genres.
- Infrastructural inequities lead to most music activity being concentrated in the downtown core.
- Artists need more opportunity develop talent and audience to become label-ready.

OVERALL:

Economic opportunity is embedded in each of this document's strategic directions and may also be enhanced by intergovernmental advocacy. In addition, Toronto's music industry can generate even greater impact through improvements to existing and exploration of new, means to fund or finance artists and businesses and engage audiences.

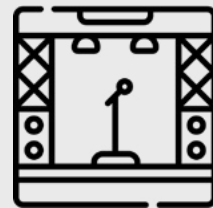
Key Opportunities:

- Many consider technology a way forward for the industry and are interested in learning about new monetization strategies (e.g., NFTs, social media, content creation).
- Enhanced opportunities for music in connection to other adjacent industries – particularly film and TV production – would benefit the industry.
- There is opportunity to boost Toronto as a leader in virtual concert production, bridging IDM with music.
- Innovation can create opportunities to raise the quality of life for all musicians and music industry stakeholders.
- The diverse backgrounds of Toronto-based artists provide an opportunity for Toronto-made music to travel and resonate in a variety of global markets.



The Strategic Framework

SPACES TO PRACTICE AND PERFORM | ABOUT



A jurisdiction needs safe, affordable spaces for artists to live, create and perform music; and for a healthy live music ecosystem, a city needs a “venue ladder” to cater to different genres and levels of artist career development.

Emerging musicians develop by progressing through this ladder – and by having access to affordable rehearsal space. As musicians refine their music and performance skills, their career potential and marketability grow.

Performance spaces – including commercial live music venues – also directly add to a city’s vibrancy, creating economic spillover benefits for nearby businesses.

Space for music – live venues, rehearsal and recording studios and pop-up and/or temporary space – outside the downtown core will create more opportunities for artists and industry to develop in diverse communities while reducing barriers to access.

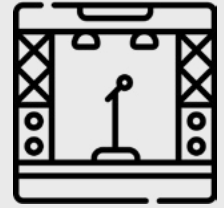
Impacts:

- Keeps musicians in Toronto
- Enhanced opportunity to develop music products
- Increased spending in neighbourhood across the city
- Tourism spending – mainly at larger venues
- Increased vibrancy of city, contributing to enhanced quality of life generally and talent attraction for other industries



The Strategic Framework

SPACES TO PRACTICE AND PERFORM I COMPARABLES



The following examples illustrate how other jurisdictions are approaching spaces to practice and perform.

Venue Support

With many music venues at risk of closure, several jurisdictions have introduced programs and initiatives that aim to help venues keep their doors open or improve building conditions.

- **Good Music Neighbours (Creative Victoria):** A statewide grant program that supports venues in providing premium quality sound for audiences and performers while also managing external noise levels.
- **The Grassroots Venue Tickets platform (Music Venue Trust UK):** In 2016, Music Venues Trusts and Ticketmaster partnered on the “The Grassroots Venue Tickets” platform, which allowed for increased revenues from ticket sales for grassroots venues. In 2021, the platform was upgraded and an improved commercial deal was made that allowed for venues to receive a 50% rebate on all bookings.

City of Reykjavík:

- **The Music Venue Improvement Fund:** A fund that supports small and medium-sized live music venues to renovate and improve their facilities, stage equipment and accessibility.
- **Music Moves Europe:** Co-operation of Small Music Venues: Reykjavík Music City and a consortium of small music venues in the city are working on a 14-month project to secure a sustainable future for small music venues in Reykjavík.

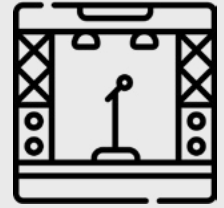
Rehearsal Space

Jurisdictions are creating opportunities for musicians to find accessible rehearsal space and providing consultations and guidance when they are at risk of losing their space.

- **Rehearsal Space for Students and School Groups (City of Sydney):** This initiative is part of the City of Sydney’s live music and performance action plan, which aims to support local musicians and the live music scene. It provides a list of rehearsal spaces that are available for students and budding musicians, as well as easy access to book and secure space.
- **Kultur Räume Berlin “Culture Spaces Berlin” (Senate Department of Culture and Europe, in association with real estate service providers and the independent art/culture scene):** Kultur Räume Berlin regularly offers subsidized spaces for working, production and presentation to Berlin professionals of all artistic disciplines. Kultur Räume Berlin provides consultation for artists of the independent scene in Berlin on the topics of workspaces, loss of their spaces, as well as the process of applying for a space.



SPACES TO PRACTICE AND PERFORM I ASSESSMENT



OVERALL:

Space is an essential component of the music value chain. The growing shortage of affordable spaces to live, create, rehearse and perform is a serious concern for Toronto's music community.

Key Challenges:

- The lack of rehearsal spaces and performance venues were the two largest issues reported by interviewees and in the survey.
- Although largely outside City purview to create or program, more small and mid-sized performance venues are especially needed, as well as spaces oriented toward hip-hop, R&B and pop genres.
- Interviewees point to safety concerns at music events and venues (e.g., adequate lighting, etc.) and accessibility issues with some venues around the city.

Key Opportunities:

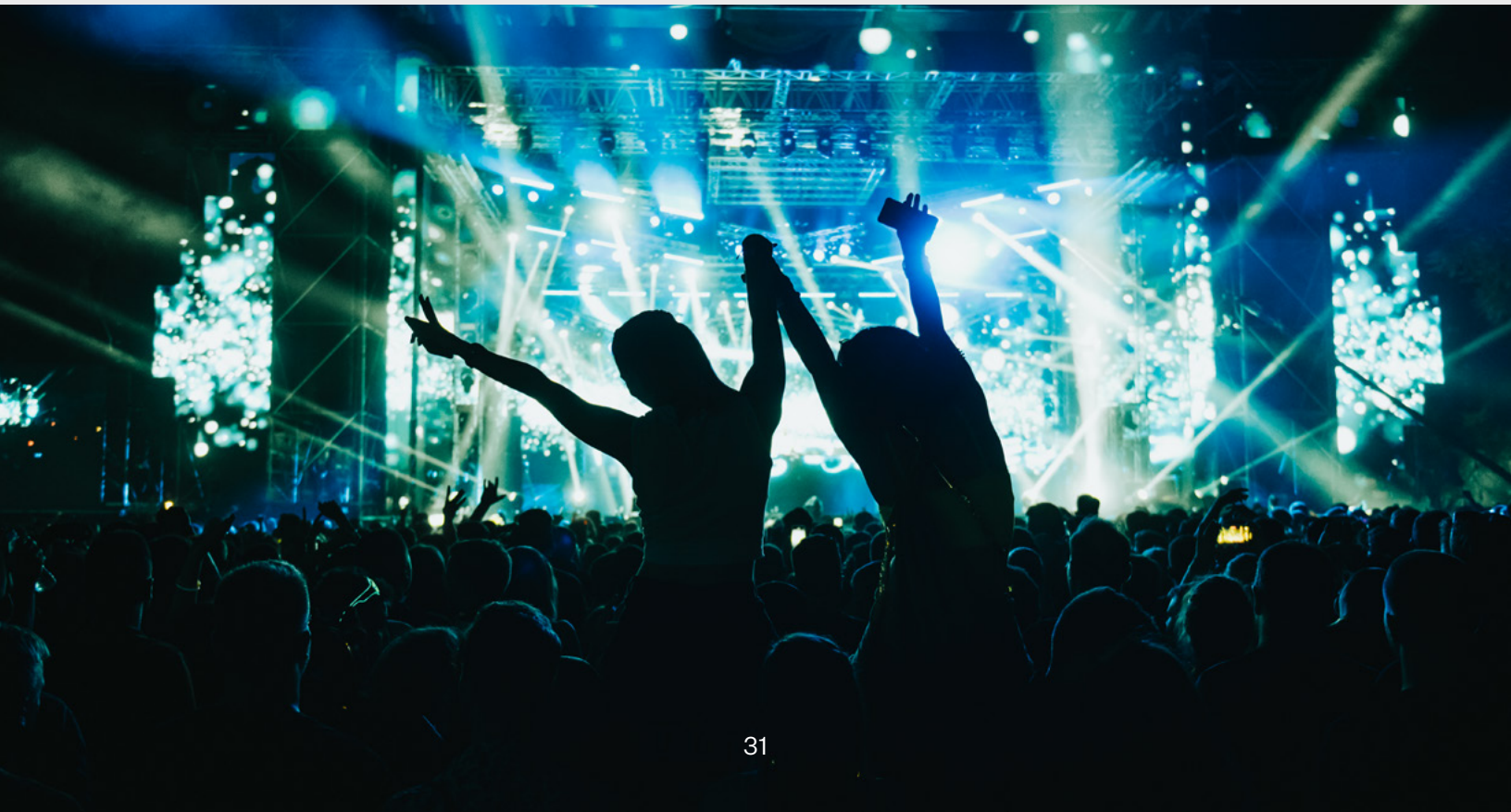
- The City should prioritize work in identifying and allocating City-owned spaces to be used for music, through below market rate lease to not-for-profit music organizations and/or to operators of music rehearsal facilities.
- An opportunity exists to make better use of Toronto's outdoor spaces for public performance, including parks and patios associated with restaurants and entertainment venues.
- Further exploration of flexibility within City bylaws and the provincial building and fire codes to permit pop-up events and temporary-use permitting could help support innovative models and increase access to space among diverse groups.
- The City might explore creating or supporting grants and funding opportunities for music venue improvement and sustainability.



The Strategic Framework

MUSIC IN TORONTO | A SUMMARY ASSESSMENT

- Toronto is Canada's leading music jurisdiction, with a wealth of artists and industry talent who advance the city's vibrancy, diversity and creative economy. Supporting and retaining artists is crucial to the health of the overall ecosystem.
- The industry would benefit from greater connectivity, internally amongst stakeholders, with other creative industries and with global and digital markets.
- While there is world-class music education in Toronto, enhancement of business skills would accelerate creative entrepreneurship and grow the industry.
- Toronto's diversity must be supported by policies, programming, funding and other supports that span all areas of the city and all genres of music – and result in broader, more equitable access and less gatekeeping.
- Distribution and live performance trends challenge incomes and therefore, artist retention. Innovative solutions and partnerships can create new opportunities, while also supporting established, traditional models and businesses.
- The contraction in available creative space can be addressed by leveraging City assets and by developing policy, regulation and planning in innovative ways.
- The existence of the Music Office (and TMAC) exemplifies the City's commitment to supporting music, although there is room for the Office to enhance and increase communication with the industry about City supports.



STRATEGIC DIRECTIONS

Strategic Directions

WHAT DOES THE CITY CONTROL?

The City of Toronto has a range of financial and policy tools it may use to support its music ecosystem. The main levers include the following:

Financial Assistance

- **Toronto Arts Council:** The bulk of Toronto's arts support goes through TAC, whose grants target not-for-profit arts organizations (and in some cases, individual artists). For-profit / commercial music businesses are not eligible for support.
- **Creative Co-location Facilities Tax Subclass:** In 2021, provided up to 50% property tax relief for 58 eligible live music venues.
- **Small Business Tax Reduction:** In 2021, City Council approved a permanent 15% tax reduction for all small businesses.
- **Imagination, Manufacturing, Innovation and Technology (IMIT):** Eligible developments benefit from a grant of 60% of the increase in the municipal taxes attributable to the eligible development over 10 years.

Economic Development and Culture

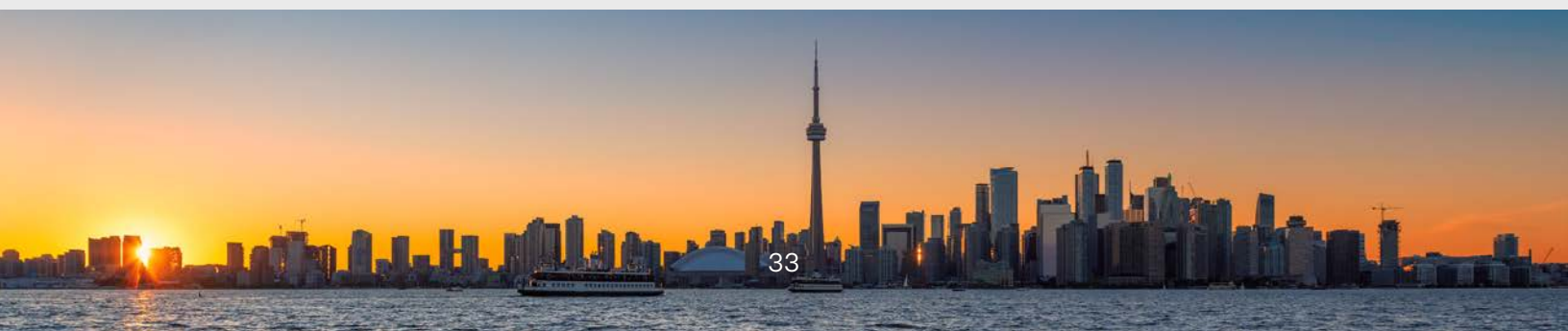
- **Music Office:** Music Office financial support is limited to low dollar-value grants targeting grassroots organizations and events that create opportunities for emerging local artists.
- **Business Growth Services (BGS):** BGS supports Toronto-based companies through a range of programs and services including the Business Improvement Areas (BIA) Office.

Regulatory

- **Zoning:** Determined by City Planning, according to Toronto's Official Plan designation for land use citywide. Zoning determines what kinds of uses are permitted at a property and what license types are possible.
- **Business Licensing:** Issued by Municipal Licensing and Standards and required by businesses including those serving food, bars and nightclubs.
- **Agent of Change:** Toronto's version of these internationally practiced guidelines seeks to protect pre-existing entertainment venues from complaints originating from newer residential units developed nearby. Through City Planning, the Music Office provides comments on applications for residential development within 120m of a live music venue, requiring a warning advisory to accompany offers of purchase in the new building.

Transactional / Space

- **City-owned Space:** Through initiatives such as Community Space Tenancy and other programs, the City can lease space at below market rate to community, cultural, or creative organizations.
- **Office of Creative Space:** Coordinates inter-divisional work in identifying, advocating for and allocating space for culture, including for music.



Strategic Directions

WHAT DOESN'T THE CITY CONTROL?

Many policy or regulatory tools lie beyond the City of Toronto's authority, including those governing the following areas:

Privately-Owned Property

The City cannot limit or affect the sale of private property. For example, a property owner selling to a developer is beyond City purview, as is the eventual fate of the property (e.g., whether or not residential condominiums are developed on the site). City of Toronto zoning can determine the eventual use – but the property can be sold and bought regardless. Also, a property developer may apply for a “variance” to allow for greater flexibility within existing zoning.

Fire Code

The Ontario Fire Code sets out a building's capacity limits (occupancy load) and required number of washrooms, entrances and exits for that number of people. These stipulations affect both permanent, bricks-and-mortar live music venues and alternative, pop-up spaces used for entertainment purposes.

Public Health Regulations

The vast majority of COVID-19 pandemic-related public health regulations affecting capacity limits, customer and staff protocols and permitted activities in public and private venues are strictly the purview of the Province of Ontario.

Liquor Licensing

- The City neither issues nor regulates liquor licenses – these are the purview of the Alcohol and Gaming Commission of Ontario (AGCO).
- However, in the case of applications for extended hours for alcohol service, an event must first be deemed “of municipal significance” by City community council prior to an event organizer or venue applying to the AGCO for an extended hours permit. The local City Councillor may approve or refuse to grant an extended-hours application.

Building Code

The Ontario Building Code determines permitted uses from a building perspective. Currently, the OBC does not allow for “temporary change of use” – meaning, for example, that a property with a designated light-industrial use cannot legally be used for a pop-up entertainment event without the applicant going through a time-consuming and costly (permanent) change of use application process.

Federal / Provincial Grants and Funding

Funding programs originating with other levels of government – or related agencies such as FACTOR, Canada Council for the Arts, Ontario Creates and others – are outside City of Toronto purview.

Strategic Directions

STRATEGIC DIRECTIONS

Based on the Conditions of Success, which reflect patterns of response from industry consultations, surveying and jurisdictional scans – and considering the parameters of the City of Toronto’s own powers – the following six strategic directions are recommended:

1. Enhance connectivity to create opportunities

- Foster connections within the music industry for knowledge-sharing and partnership and with national, global and digital markets for business and export opportunity
- Connect to other industries to increase opportunities, prioritizing the creative industries and tourism

2. Ensure strong presence and influence for the industry in municipal programs and policies

- Advance the interests of the music industry by involving the Music Office in key policy or programming initiatives at City Hall
- Advance understanding of the unique needs of the music industry in order to better streamline, adapt and communicate City processes and systems to support the industry

3. Facilitate varied, accessible space

- Explore the use of City-owned assets by cultural organizations
- Explore City policy and regulations that support the retention or growth of space, including areas outside the downtown core
- Develop the use of space to support night economy initiatives

4. Increase performance opportunities

- Continue and expand City Hall Live and other Music Office programming and community partnerships, encouraging cultural and geographic diversity
- Support private-sector organizations providing artist performance opportunities

5. Advance the professional skills of the creative music workforce

- Foster opportunities to provide business skills that advance marketing/promotion, financing and funding, company growth, digital sales, contract negotiation
- Assist efforts to provide information and guidance for young people entering the industry

6. Advocate to other levels of government

- Communicate sector concerns on financial sustainability, funding, copyright, insurance, artist quality of life and other issues as needed



Strategic Directions

DIRECTION 1

ENHANCE CONNECTIVITY TO CREATE OPPORTUNITIES

Potential City Actions

- Provide a suite of targeted initiatives to foster connectivity within the industry.
- Help build internal connections among Toronto's many music communities and between established and emerging industry.
- Assist organizations in avoiding unnecessary duplication of services and competition for limited resources.
- Leverage City partnerships and mechanisms to connect the local music industry with national, global and digital markets for business development and export opportunities.
- Foster connections between music and other industries to increase opportunity, prioritizing the creative industries and tourism.
- Integrate Music Office support of local artists, events and the sector generally with tourism, including the City's Tourism Services unit, to better promote music events and initiatives.



Strategic Directions

DIRECTION 2

ENSURE STRONG PRESENCE AND INFLUENCE FOR THE INDUSTRY IN MUNICIPAL PROGRAMS AND POLICIES

Potential City Actions

- Advance the interests of the music industry by involving the Music Office in key policy or programming initiatives at City Hall.
- Advance understanding of the unique needs of the music industry in order to better streamline and adapt City processes and systems to support the industry, such as:
 - Help streamline processes for music event organizers holding events on City property and more flexibility for event organizers using alternative/non-traditional spaces for music events
 - Ensure music sector input in a revamped zoning and licensing framework for bars, restaurants and entertainment venues.
 - Create music-friendly allowances such as dedicated parking zones for musicians loading into venues.
- Increase access to events and resources for equity-seeking groups and encourage activities outside the downtown core in Scarborough, North York and Etobicoke.
 - Expand City Hall Live partnerships with local music organizations to create performance opportunities.
 - Encourage industry-led music events in emerging entertainment areas outside the downtown core.
- Enhance and expand the Music Office website (toronto.ca/music), to enrich content and functionality for those in the industry and for the Toronto public and visitors. The office could also:
 - Regularly update the music community on Music Office and industry activities and opportunities.
 - Foster networking opportunities, including those with national music organizations representing equity-deserving groups.



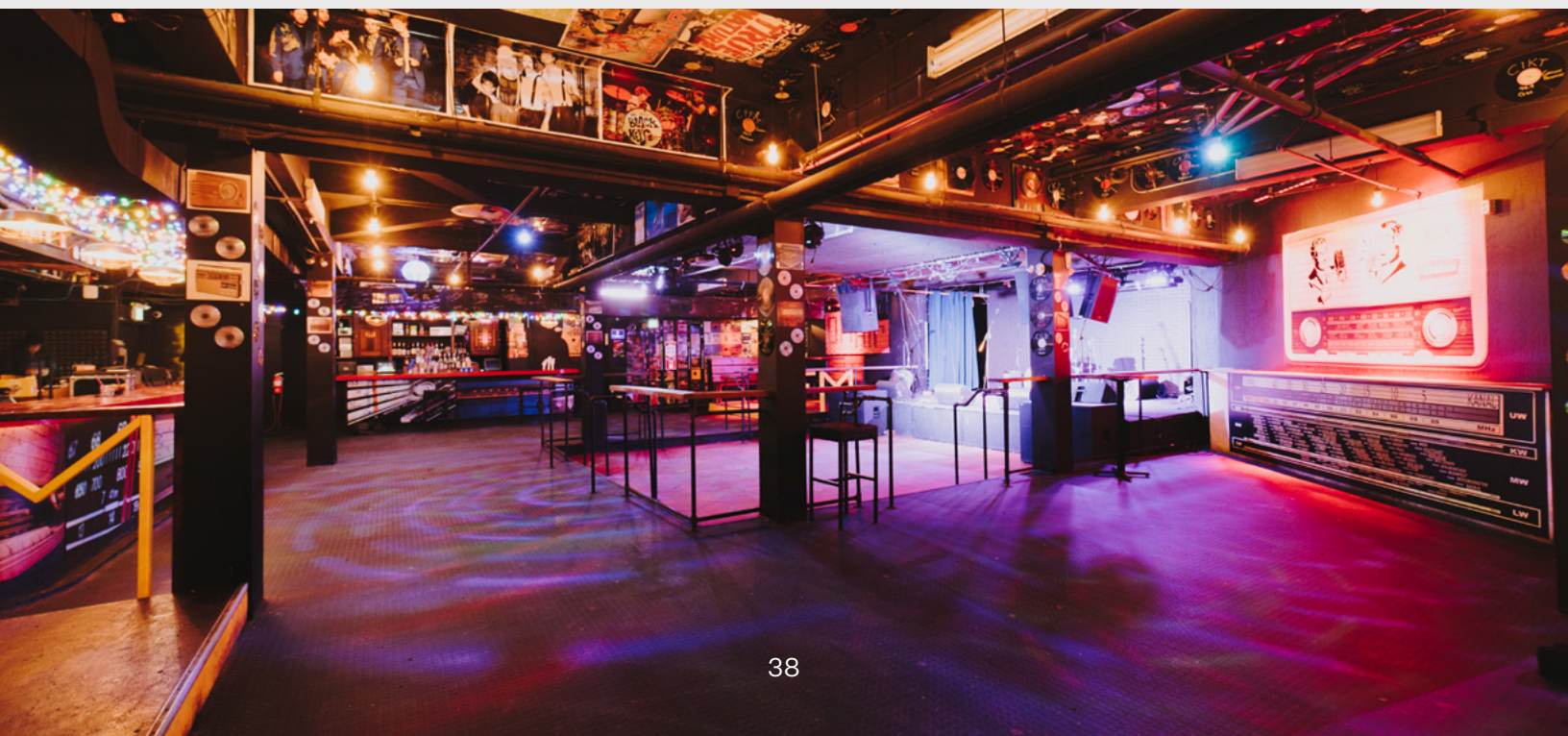
Strategic Directions

DIRECTION 3

FACILITATE VARIED, ACCESSIBLE SPACE

Potential City Actions

- Involve the Music Office in work with other City divisions and the private sector to address the pressing issue of dwindling performance and rehearsal venues in Toronto.
 - Identify City-owned spaces suitable for below-market-rate lease to organizations offering performance or rehearsal space to musicians.
 - Identify opportunities for new rehearsal facilities and support industry efforts to create new models to offer music rehearsal space.
 - Explore tools related to zoning and heritage designation to help preserve cultural space.
- Increase City support for live music performance.
 - Promote and expand the reach of the Creative Co-location Facilities Tax Subclass offering property tax relief for live music venues.
 - Explore opportunities for the industry to better utilize outdoor space such as parks and venue patios.
- Create an online toolkit with clear, comprehensive information for those seeking to establish a new live music venue and/or performance space, including outside the downtown core.
- Create an online resource guide for event organizers seeking to use temporary/pop-up space for music events.
- Involve Economic Development and Culture in work with other City divisions to improve infrastructure for the night economy, including streetscape lighting, pickup/drop-off areas and public transportation options.



Strategic Directions

DIRECTION 4

INCREASE PERFORMANCE OPPORTUNITIES

Potential City Actions

- Foster more performance opportunities by engaging in more collaborations similar to City Hall Live community partnerships, YYZ Live and Music 311.
 - Prioritize partnerships creating performance opportunities in Scarborough, North York and Etobicoke, especially those highlighting emerging artists from these areas.
 - Encourage connections between the music community and small businesses to grow opportunities for live performances.
- Leverage City mechanisms to better promote local artists and organizations highlighted through ongoing Music Office programming and partnerships.
- Facilitate and encourage more performance opportunities in outdoor spaces, including space outside the downtown core.
- Continue the endorsement of municipally significant events that encourage venues to collaborate with festivals and events to create more performance opportunities and promote tourism.



Strategic Directions

DIRECTION 5

ADVANCE PROFESSIONAL SKILLS OF THE CREATIVE MUSIC WORKFORCE

Potential City Actions

- Advance the creation of business skills training opportunities for artists, emerging industry professionals and early-stage companies or organizations, which could include:
 - Identifying organizations – within the music industry, in complementary creative industries, or educational institutions – with which to partner in providing this training. Analyzing gaps, assets and common needs across sectors.
 - Supporting organizations and workshops that provide this training, helping coordinate between organizations offering similar or related professional skills training and encouraging collaboration where appropriate to reduce overlap and unnecessary competition for the same resources.
 - Bring together aligned, IP-driven industries such as interactive digital media and film to participate in mutually relevant training opportunities to advance both skills development and connectivity.
- Support music-focused workshops around new monetization strategies for musicians, new advances in digital audio and recording technology and maximizing the use of remote technologies.
 - Assist efforts to provide young people with practical, career-oriented information about the music industry through working with schools or partnership with music organizations.
- Promote all training and other supports such as networking, funding and other programs, to ensure those in the industry are fully aware of the tools available to build their business.
 - Expand and maintain updated information on music grants and funding listed on the Music Office website.
- Continue and expand work with post-secondary educational institutions to advise and support efforts to prepare graduates for sustainable professional careers in music.



Strategic Directions

DIRECTION 6

ADVOCATE WITH OTHER LEVELS OF GOVERNMENT

Potential City Actions

- Use the Music Office to ensure the City of Toronto's advocacy with other levels of government assists Toronto musicians, music professionals and the music ecosystem, including advocacy for live music venues, cultural space and professional development and training for artists and grassroots industry.
- Continue advocacy on broad issues related to quality of life for artists, including livable wages, income and housing.
- Encourage funders to ensure funding advances equity objectives to support the development of new talent, diverse genres and innovation.
 - Advocate for greater access to funding for applicants from equity-deserving groups, including groups with diversity in organizational leadership.



Strategic Directions

DIRECTIONS | SUMMARY

The City of Toronto is able to implement the outlined strategic directions through four main levers:

- Financial Assistance (e.g., Toronto Arts Council, Business Tax Reduction, etc.)
- Economic Development and Culture (e.g. The Music Office, Business Growth Services)
- Regulatory (e.g., Zoning, Business License, Agent of Change, etc.)
- Transactional/Space (e.g. City-owned Space, Section 37/Community Benefit Charges, Office of Creative Space)



The six strategic directions of this strategy are:

1. **Enhance Connectivity to Create Opportunities** to foster connectivity within the industry, leverage City partnerships and create connections with other industries and tourism sector.
2. **Ensure Strong Presence and Influence for the Industry in Municipal Programs and Policies:** by further involving the Music Office in key policy at City Hall, advancing the understanding of the music industry, increasing access to equity seeking groups, advocating for more music activity outside of the downtown core and by increasing the functionality of the Music Offices' online assets.
3. **Facilitate Varied, Accessible Space** by working with City divisions and the private sector to address the closure of music spaces, increasing support for live music performances, creating online toolkits and resources and by working to further involve EDC into the improvement of night economy infrastructure.
4. **Increase Performance Opportunities** by fostering more performance opportunities across the City and by leveraging mechanisms to highlight and promote local artists and organizations.
5. **Advance Professional Skills of the Creative Music Workforce** by advancing the creation of business skills training, support music focused workshops and networking opportunities and by bringing more awareness to already available resources and programs.
6. **Advocate with Other Levels of Government** by representing the music industry across other levels of government, continuing advocacy for broad issues, by ensuring that funders advance equity objectives.

APPENDIX

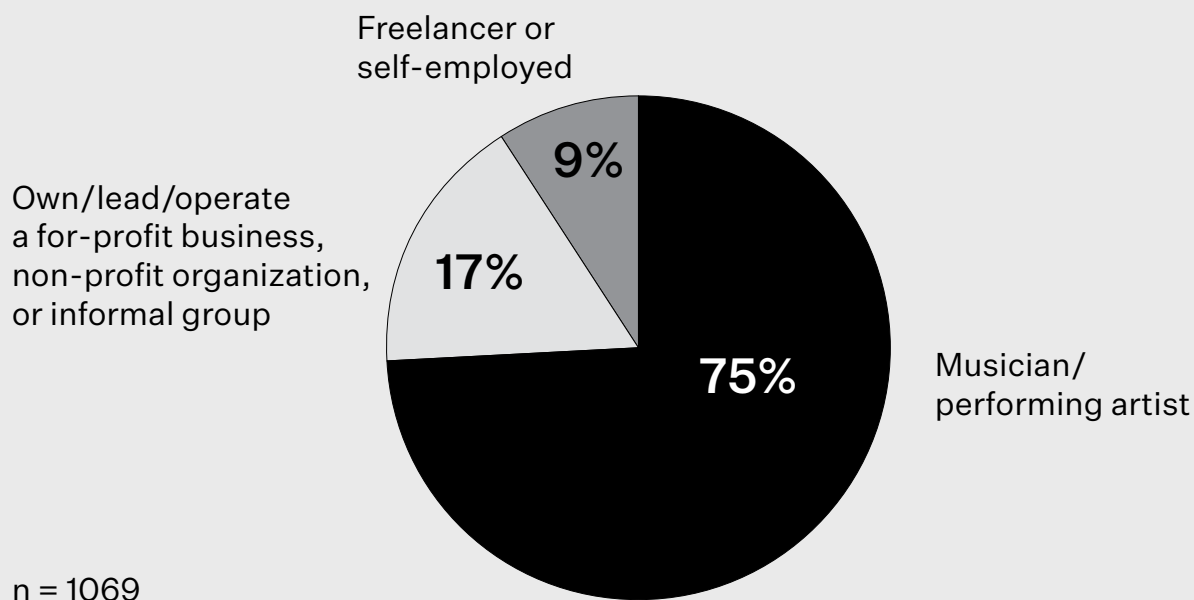
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SURVEY RESULTS

TORONTO'S MUSIC INDUSTRY DEMOGRAPHICS

- Launched on December 6, 2021, the survey received 1,069 responses, with a 61% completion rate.
- The breakdown of respondents is representative of Toronto's music community. Though skewed towards musician/performing artists (75%), the survey captured responses from businesses and organizations (17%) and those identifying as freelancers or self-employed (9%).
- It is recognized that many musicians hold multiple roles and thus may also be captured in other categories (e.g., they also own a business, or identify as self-employed).

Respondent Profiles: Breakdown of Toronto's Music Industry

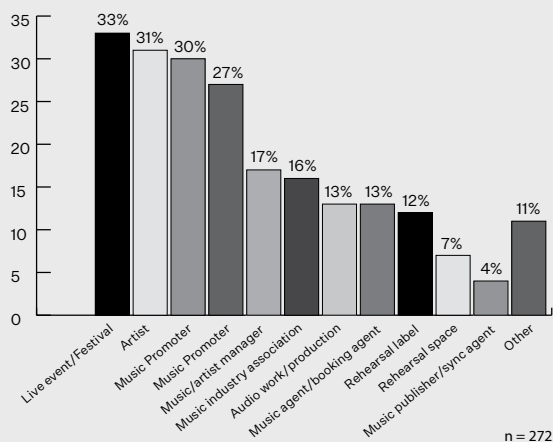


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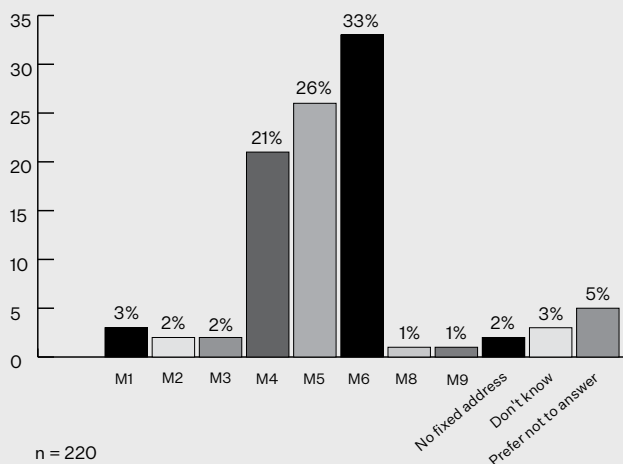
MUSIC BUSINESSES & FREELANCERS — OVERVIEW

- Based on the profiles of companies/organizations and freelancers/self-employed individuals, most music business activity in Toronto is in live events/festivals (33%), followed by artists (31%), music venues (30%) and music promotion (27%). 'Other' responses included research, consulting, music education and music journalism.
- According to survey results, most music businesses in Toronto are for-profit enterprises (72%). Not-for-profit organizations accounted for 21%, followed by informal groups (12%) and registered charities (7%). 3% of businesses were unsure of their designation.
- As represented in the chart below, music business activity exists across the City, but there is significant concentration toward the downtown core (80%) with less activity in bordering regions such as Scarborough and North York (9%).

Music Business in Toronto by Area of Practice



Business Activity in Toronto's Music Industry by Postal Code

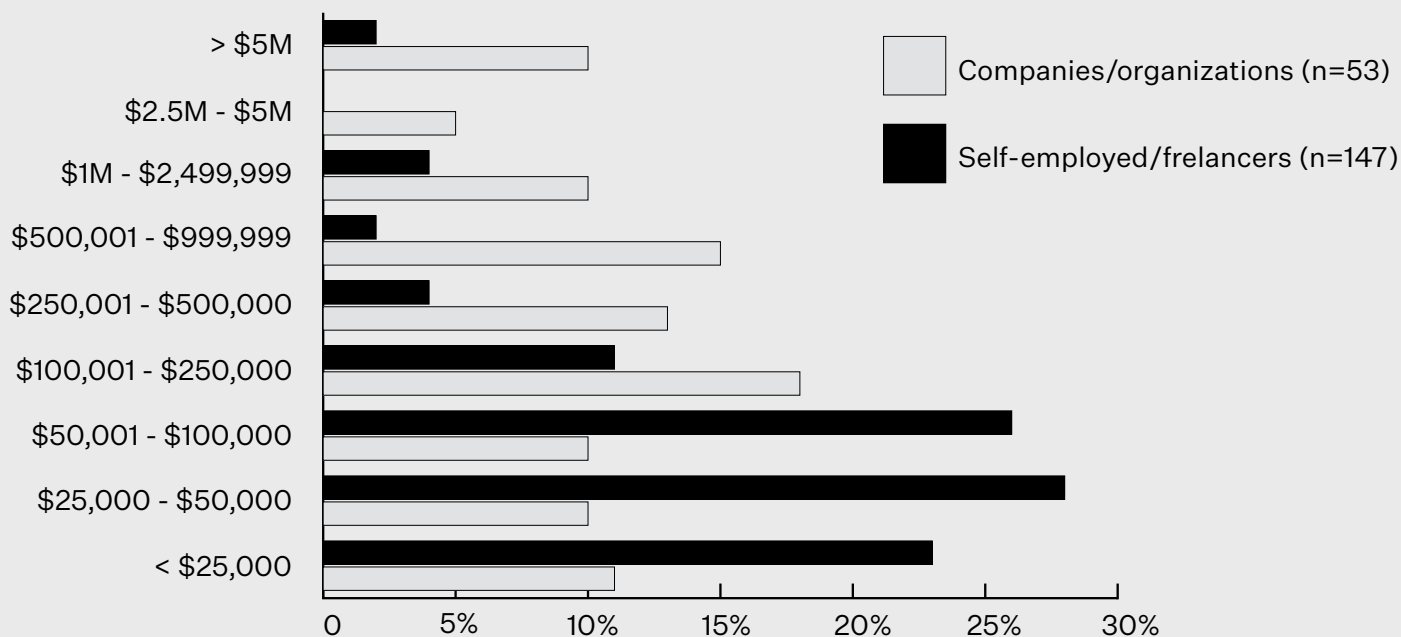


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MUSIC BUSINESSES & FREELANCERS — REVENUES

- A large majority (92%) of music businesses (including self-employed individuals) are generating revenue – or typically generate revenue outside of the pandemic. This includes revenue generated from business activities and public funding.
- On average, public funding constitutes a lower percentage (6%) of self-employed revenues, compared to that of companies/organizations (18%).
- For both companies/organizations and self-employed individuals, the amount of revenue generated varies from under \$25,000 to over \$5 million, indicating a range of businesses at differing levels in Toronto.
- Most companies/organizations generate revenues under \$500,000 (62%), though a number do generate revenues over \$1 million (25%).
- Most self-employed individuals generate modest revenues under \$50,000 (51%), though a quarter typically generate healthier incomes between \$50,001-\$100,000 (26%).

Gross Revenue Generated in a Typical Fiscal Year by Companies/Organizations and Self-Employed/Freelancers in Toronto's Music Industry

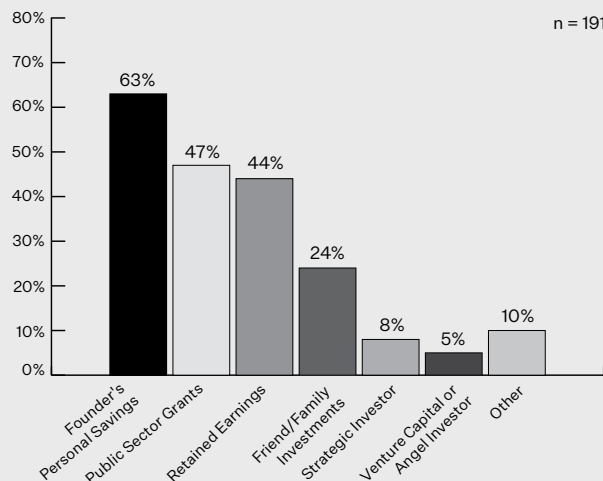


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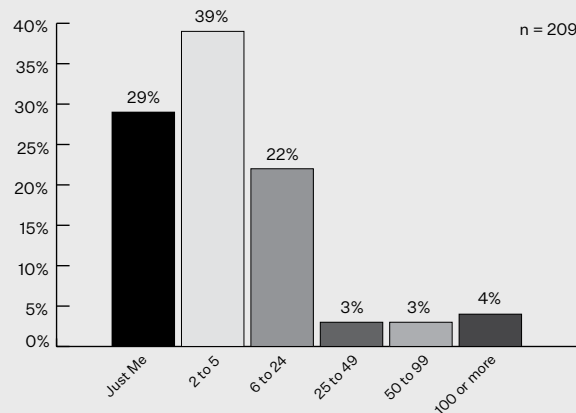
MUSIC BUSINESSES & FREELANCERS — FINANCING & HEADCOUNT

- Sources of financing vary, with a majority of companies/organizations and freelancers/self-employed individuals relying on their (founder's) personal savings (44%), followed by public sector grants (33%) and retained earnings (29%).
- Strategic investment and venture capital does not appear to be a popular method of financing in music, potentially illustrating untapped potential and a lack of opportunity.
- Of those who responded 'other,' frequent responses included private donations such as from foundations (47%) and sponsorships (32%).
- A large majority of music businesses (including freelancers and self-employed individuals) report relatively small headcounts with less than 24 employees (90%). This includes both full-time and part-time staff. Most report 2-5 employees (39%) and a number are single-owned businesses (29%)

Sources of Financing for Music Companies/Organizations and Freelancer/Self-Employed Individuals in Toronto's Music Industry



Headcounts of Music Businesses in Toronto

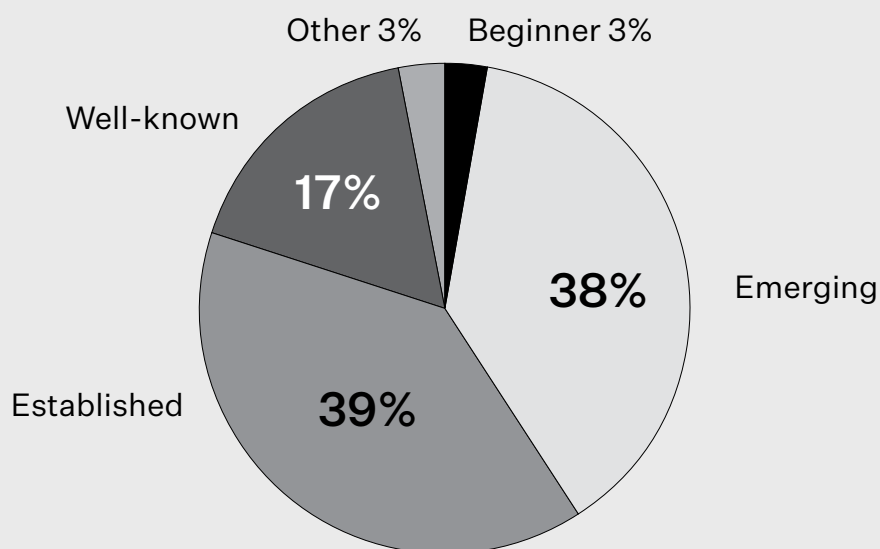


Appendix | Survey Results

ARTISTS IN TORONTO — OVERVIEW

- According to the survey, the majority of artists in Toronto are either at the established (39%) or emerging (38%) level.
- These positions are defined as the following:
 - **Beginner** artists are new to the professional scene.
 - **Emerging** artists may have work available for purchase, or have contributed to professional projects, or have established access to some professional contacts.
 - **Established** artists are understood as those with a body of professional work, network and career trajectory.
 - **Well-known** artists are a recognized name in their field, or part of a recognized group or project.
- ‘Other’ responses included those who fall in-between categories (e.g., beginner to emerging, emerging to established, etc.), as well as those who have retired or have quit the industry.

Toronto Artists by Status in the Music Industry



n = 556

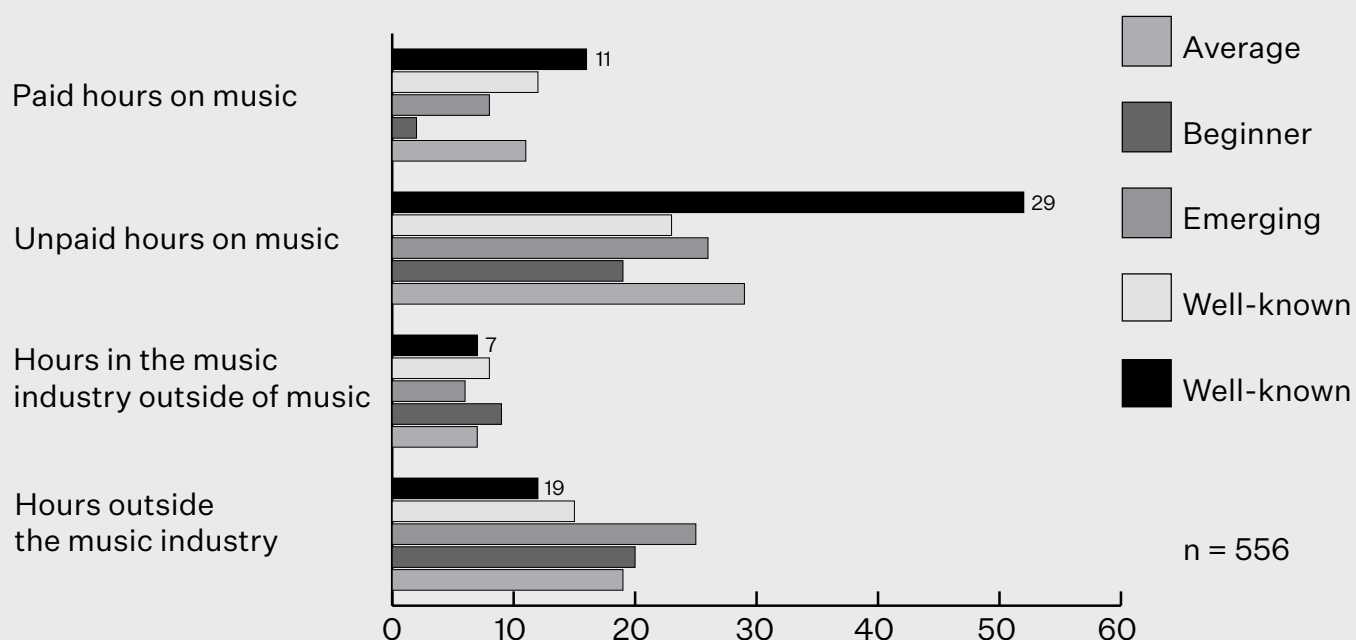
Appendix | Survey Results

ARTISTS IN TORONTO

— HOURS WORKED

- On average, artists report spending approximately 11 *paid* hours on music per week. This includes time spent on paid shows, gigs, commissions, recordings, rehearsals and so on.
 - Paid hours increase the higher the artists' status in the industry. For instance, beginners and emerging artists report fewer hours than the average, while established and well-known artists report higher than the average (as shown to the right).
 - Regardless of an artist's position, hours spent on paid music opportunities nowhere near reflect full-time equivalent loads.
- Artists spend most of their time on unpaid hours on music per week (29 hours). This includes practice, writing, marketing, administrative work and non-reimbursed travel. Well-known artists report spending a significant time on these areas (52 hours per week).
- Artists report spending 18.5 hours on average outside of the industry. This number is higher for artists who are earlier on in their careers (i.e., beginners and emerging).
- Outside of hours spent directly on music, artists appear to spend more time working outside the industry (19 hours on average) compared to working in peripheral positions within music (7 hours on average).

Average Hours Spent Per Week, by Artist Position

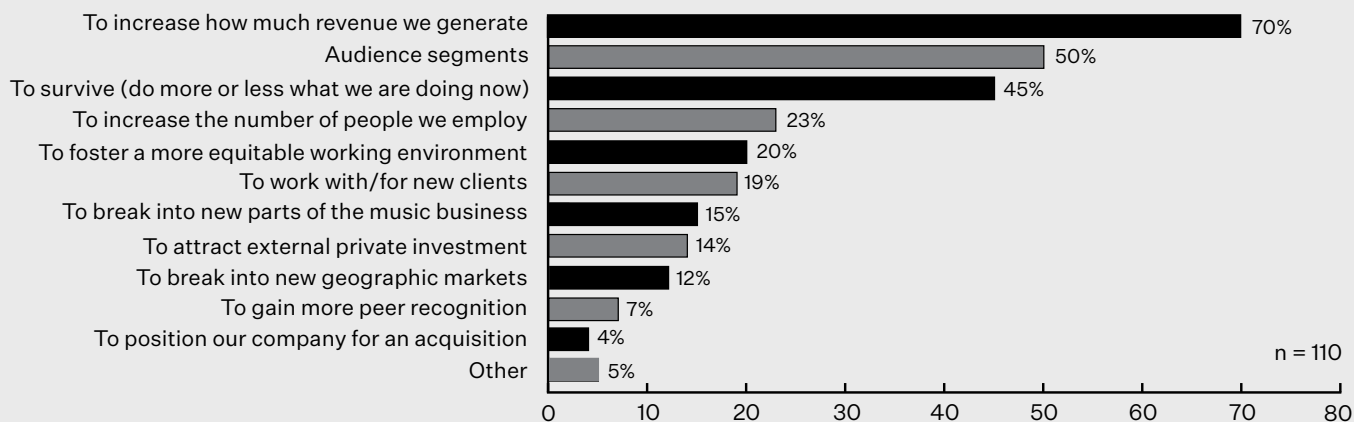


Appendix | Survey Results

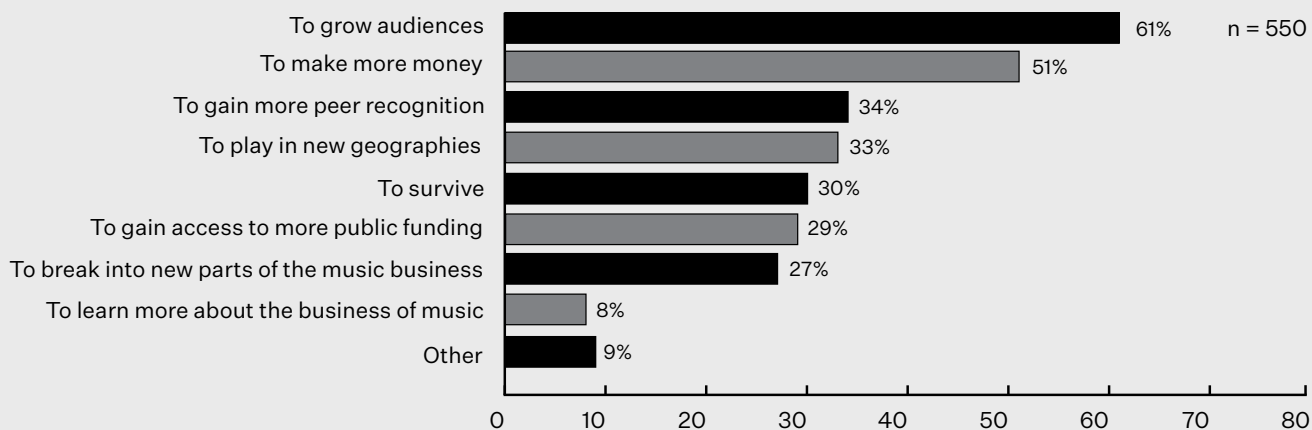
PRIORITIES OF MUSIC BUSINESSES AND ARTISTS

- When asked what their top priorities were for the next two years:
 - The majority of music businesses (including freelancers/self-employed) indicate increasing revenues is a main goal (70%). Businesses also reflect that they wish to grow audiences (50%) and to survive (45%) – likely in part due to the pandemic. Other responses included staying active digitally, hosting larger productions and diversifying programming.
- The top 3 responses given by artists include growing and building their audience (61%), increasing income (51%) and gaining more peer recognition in the industry (34%). Other responses included creative goals (e.g., making more and better music), returning to live performance and pre-pandemic careers, locating new venues and rehearsal space and learning about emerging technologies.

Top Priorities for Music Businesses/Organizations in Toronto over the Next Two Years



Top Priorities for Artists in Toronto over the Next Two Years

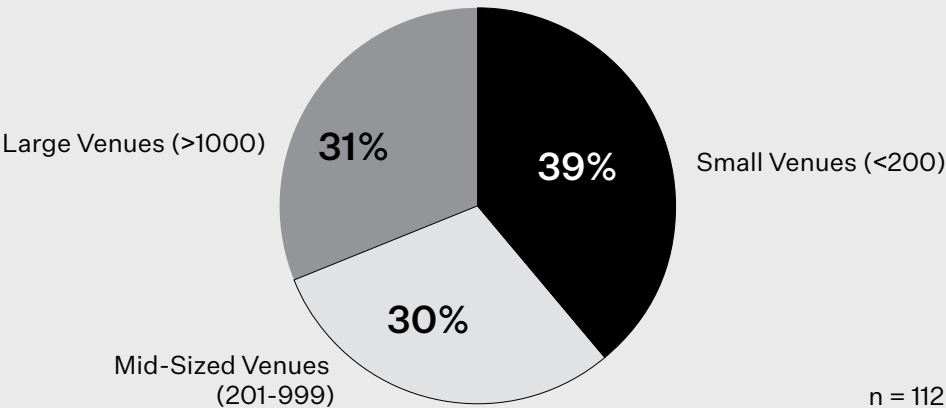


Appendix | Survey Results

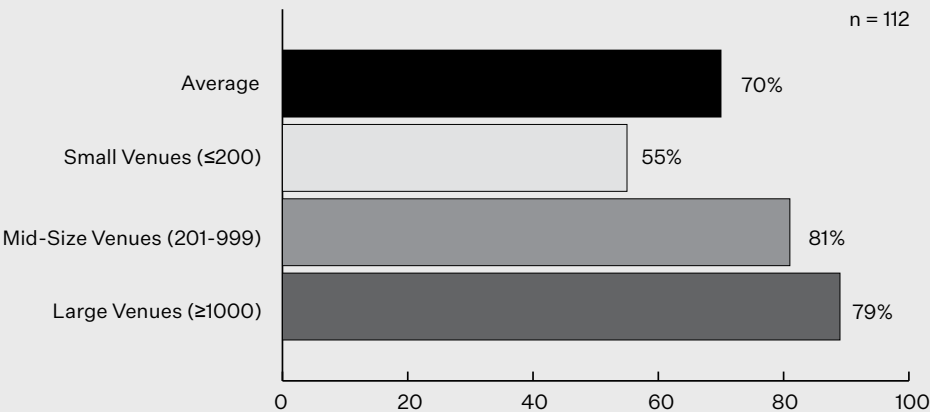
VENUES IN TORONTO

- Toronto hosts a variety of venues and festivals with capacities (including both seating and standing room) that range from as low as 20 to as high as 1 million.
- Based on the 112 venues and festivals surveyed, there appears to be a fairly even split between the number of small venues (capacities less than 200), mid-sized venues (capacities from 201-999) and large venues (capacities greater than 1000). That said, more venues appear to fit into the small venue category (39%) compared to mid-sized (30%) and large (31%).
- During a typical non-pandemic year, venues on average were able to fill about 70% of their total capacity. This number was lower at 55% for small venues and higher at 81% and 79% for mid-sized and large venues respectively. This indicates that smaller venues may have more difficulty attracting audiences.
- Yet, when asked how many shows they plan to put on over the next year, small venues on average reported that they expect to put on more shows (170) than the average indicated by mid-sized and large venues (110).

Venues and Festivals in Toronto by Capacity



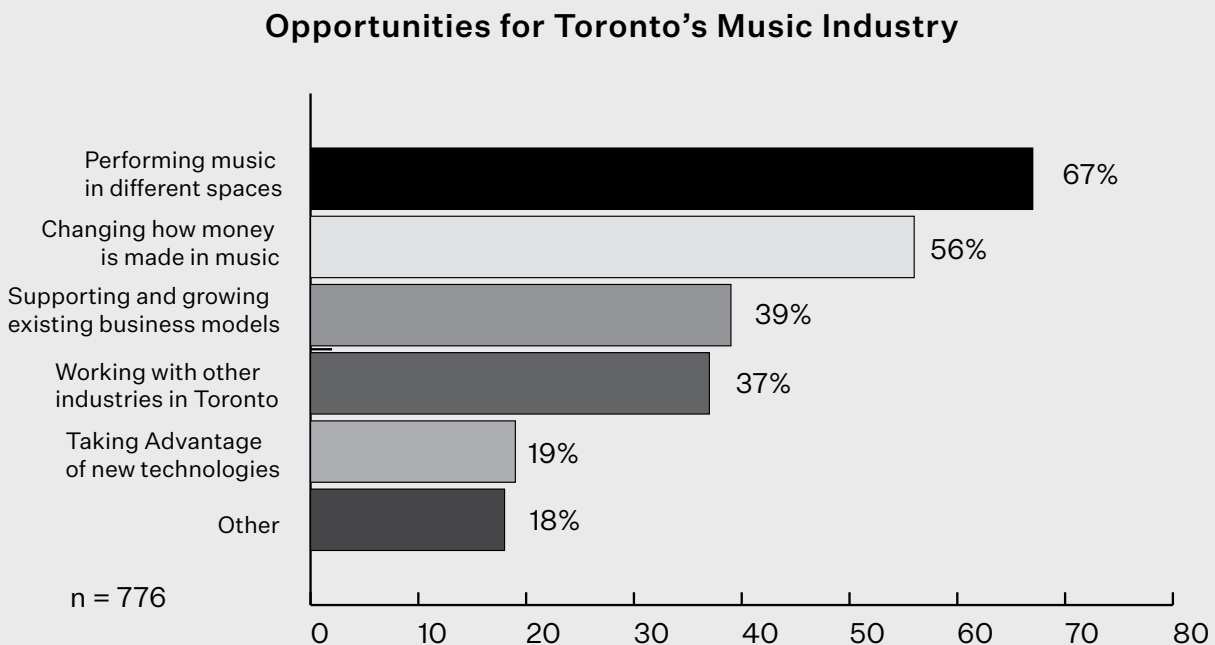
Average Capacity (as a Percent of Total Capacity) of Venues and Festivals in a Non-Pandemic Year



Appendix | Survey Results

OPPORTUNITIES FOR TORONTO'S MUSIC INDUSTRY

Respondents identify performance opportunities in new spaces (67%) as the biggest opportunity for Toronto's music industry, followed by changing how money is made in music (56%). These sentiments reflect challenges and concerns raised in interviews around space limitations, lack of performance opportunities and income challenges.



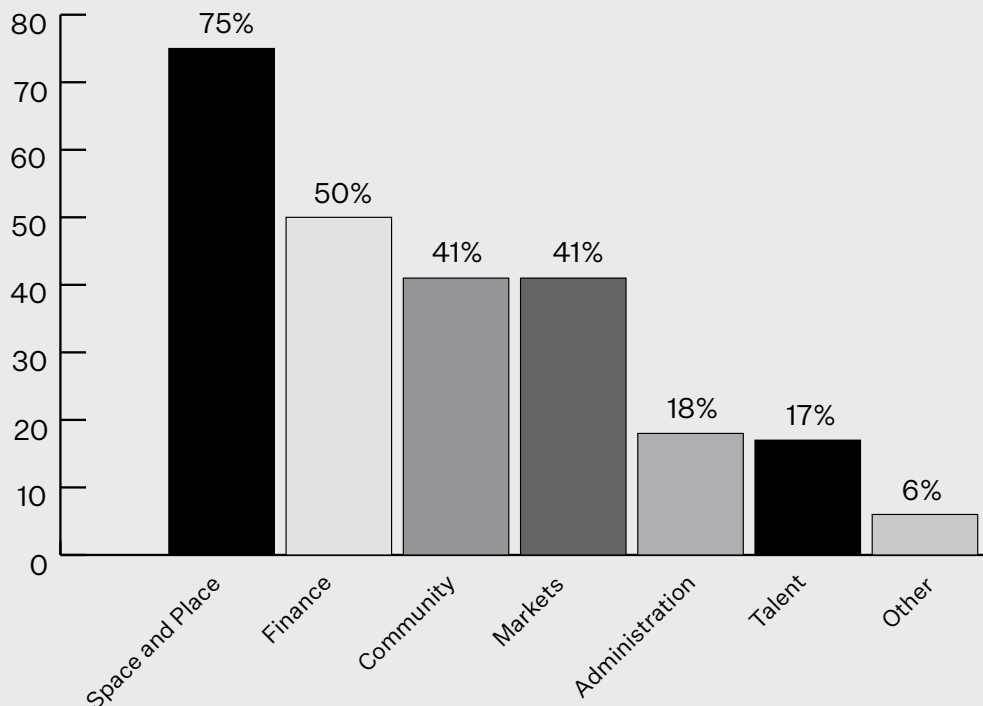
- **Performing music in difference spaces:** respondents indicate opportunities to use public spaces, diversify venues and paid performance opportunities and to improve access.
- **Changing how money is made in music:** respondents express that there is an opportunity to support and advocate for sustainable financial models (e.g., Universal Basic Income, fair compensation from streaming, artist pay regulations for venues and improved granting processes).
- **Working with other industries in Toronto:** respondents point to opportunities around sync and increased economic opportunity available in film, TV, advertising, video games and podcasts.
- **Taking advantage of new technologies:** respondents point to technologies such as NFTs, the metaverse, live streaming and VR.
- Of those who responded 'other,' a significant number (43%) mentioned supporting and fostering venues and affordable rehearsal spaces. Others also mentioned creating a more inclusive and equitable industry.

Appendix | Survey Results

BARRIERS AND AREAS FOR SUCCESS

- When asked what the most important areas are for a music industry to succeed, a large majority said space and place (75%) as shown in the chart below.
- Within each category, top barriers were identified as follows:
 - **Space and place:** access to suitable performance space (69%), access to rehearsal space (68%) and concern about the displacement of cultural heritage (e.g., venues) through re-development (66%).
 - **Finance:** access to music-specific funding programs (e.g., FACTOR, OMF, artist grants) (78%) and access to general funding programs (e.g., for small businesses) (57%).
 - **Community:** access to contacts within the industry (60%), access to adjacent creative industries (58%) and access to people with specific music expertise (49%).
 - **Markets:** the ability to access customers/audiences in Canada (84%) and outside of Canada (64%).
 - **Administration:** navigating municipal red tape and City services (60%) and the ability to manage intellectual property rights (50%).
 - **Talent:** the supply of young people in Toronto who want to work in music (45%), access to skill building and training opportunities (45%) and supply of business skills (43%).

The Most Important Areas for a Music Industry to Succeed

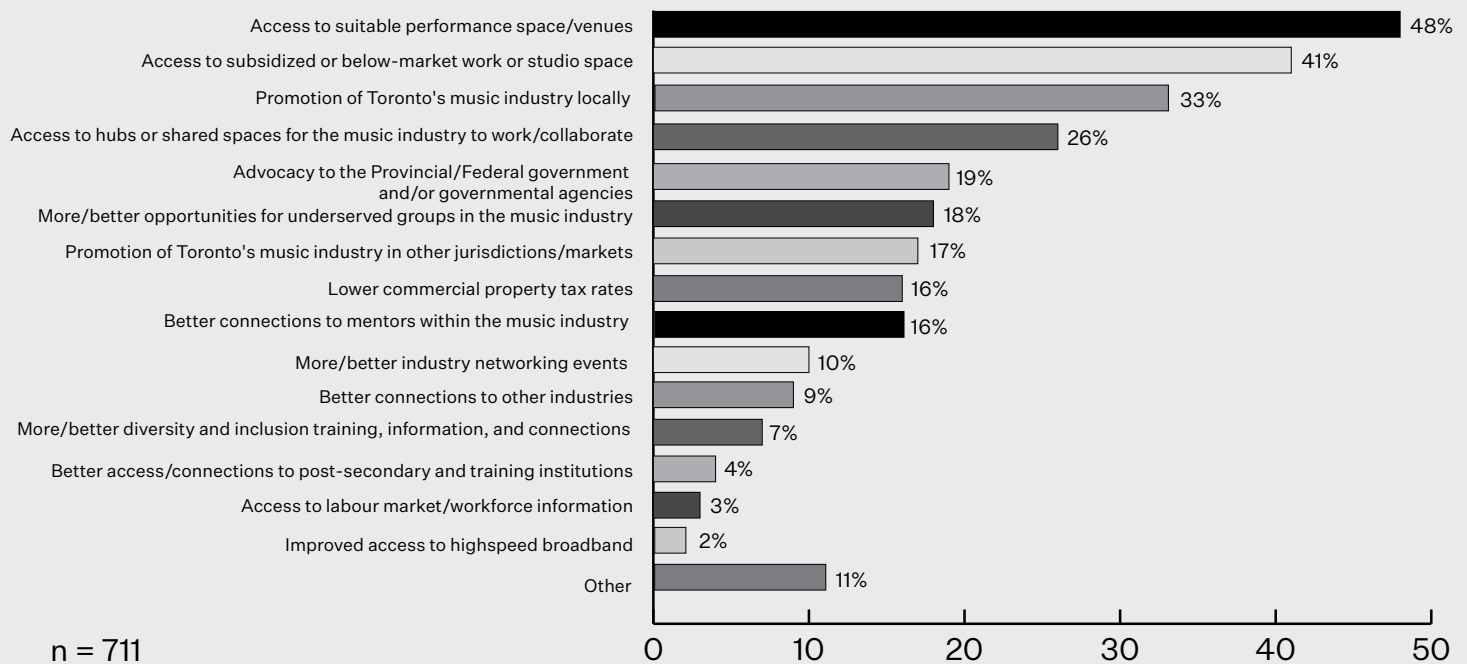


Appendix | Survey Results

OVERCOMING BARRIERS

When asked what opportunities would help to address the barriers existing in the industry, respondents reported as follows. Note that 'other' included affordable housing, more public funding, increased music education and addressing the perceived lack of value around music.

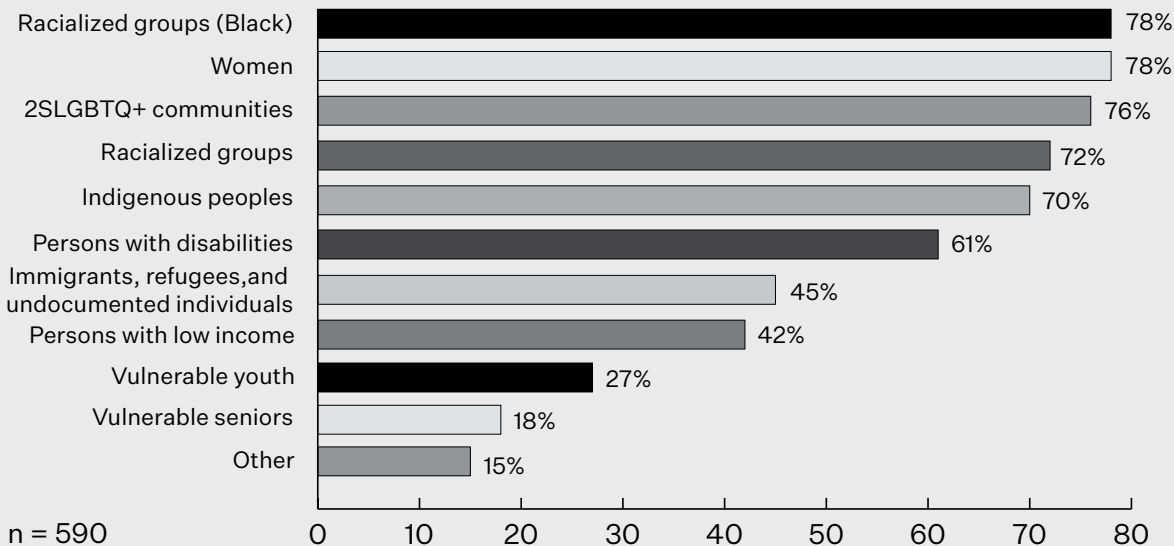
What Would Best Help Overcome the Barriers in the Music Industry?



DIVERSITY IN TORONTO'S MUSIC INDUSTRY

- Out of 590 businesses, 71% identify with an equity-deserving group. Women make up the largest piece (39%), followed by persons with low income (35%); 2SLGBTQ+ (24%); Black (17%); racialized groups (14%); immigrants, refugees, undocumented individuals (11%); persons with disabilities (10%); Indigenous peoples (7%); vulnerable youth (5%) and vulnerable seniors (3%).
- Most music businesses in Toronto do have a policy around diversity and inclusion (56%). Of those that do, these policies tend to cover a number of equity-deserving groups as shown on the right. 'Other' responses included artists without formal training, those emerging from programs and the homeless.
- The majority of businesses (62%) indicate that diversity and inclusion is one of their stated values. Many (40%) also report having a clear set of goals to improve diversity and inclusion. However, only 25% have clear, actionable plans to achieve those goals and only 38% have assessed and measured the level of diversity in their organization.

**Equity-Deserving Groups Covered in Diversity and Inclusion Policies
by Music Businesses in Toronto**



Appendix | Survey Results

INTERVIEWEE LIST

A number of individuals in the music industry were consulted through 23 interviews and a roundtable with TMAC members. Interviewees captured a range of activity in the industry. Those consulted include:

- ***Randell Adjei**, Founder, RISE Edutainment & Ontario Poet Laureate
- April Alierio**, Artist
- ***Paul Banwatt**, Partner, Gilbert's LLP; Artist
- Scott Beck**, President and CEO Destination Toronto
- ***Mary An Blom**, Vice President, Business & People Strategy Sony Music Entertainment; TMAC co-chair
- Emma Bowley**, Senior Policy & Research Officers at City of Toronto Municipal Licensing and Standards Division
- ***Hannah Burgé Luviano**, Humber Music Professor; Artist
- ***Jeff Cohen**, Co-owner, Horseshoe Tavern, Lee's Palace, Collective Concerts
- ***Charlotte Cornfield**, Artist
- Neill Dixon**, President, Canadian Music Week
- ***Kiana 'rookz' Eastmond**, CEO, Toronto Musicians' Association (AFM Local 149)
- Carmen Elle**, Artist
- Kim Fry**, Music Declares Emergency Canada
- Amy Gottung**, Executive Director, Long Winter Music and Arts Festival
- Jamil Kamal**, Vice President Venues + Risk INK Entertainment
- ***Jesse Kumagai**, Director of Programming and Business Development, Corporation of Roy Thompson Hall and Massey Hall
- Miranda Mulholland**, Artist
- ***Phoenix Pagliacci**, Artist
- Dijah Payne**, Artist
- ***Kaya Pino**, Music Supervisor, The Wilders
- Paul Ramirez**, Artist
- Jeffrey Remedios**, Universal Music Canada
- Alok Sharma**, Manager, Tourism Services City of Toronto
- Patrick Tobin**, Director, Arts & Culture Services, City of Toronto Economic Development & Culture Division
- Amie Therrien**, Music Managers Forum
- Menno Versteeg**, Co-founder Royal Mountain Records; Artist
- Nathan Wiszniak**, Head of Canada, Artist & Label Marketing, Spotify Canada

*TMAC Member

JURISDICTIONAL REVIEW

This section highlights the jurisdictions and music support organizations that produce the key music related interventions referenced throughout the “Comparables” sub-sections within the Conditions of Success section of this strategy.

Nordicity selected global music related interventions that address similar challenges and opportunities as Toronto.

The key interventions are meant to act as potential inspiration for how Toronto can address challenges and create opportunities to help artists and the music industry to continue to thrive.

Appendix | Jurisdictional Review

BERLIN, GERMANY

Population: 3.6M



Bi Nu, Berlin (Photo: © Bi Nu Website)

Description:

Known for its club scene and festivals, Berlin has unique funding institutions and structures for music and the arts more generally. Success of the music industry can be contributed to the encouragement of collaboration and networking with other creative industries.

Berlin was examined because of its approach to community-based and networking events and because, as a larger metropolis with a thriving arts community, it shares some common challenges with Toronto.

Key Music Support Organizations:

- [Musicboard Berlin](#)
- [Berlin Music Commission](#)
- [Senate Department of Culture and Europe](#)

Key Interventions:

- Pop im Kiez/“Pop in the Neighbourhood” (Musicboard Berlin): A fund that supports projects in the form of a pilot project, a campaign or other interventions that promote a specific genre of music in a particular neighbourhood in Berlin. Aims to address the “displacement of subcultural spaces in Berlin,” and make “scene-based” music communities and networks stronger in neighbourhoods, while ultimately positively impacting clubs and music venues.
- BMC Backstage (Berlin Music Commission): A networking event for the music business in Berlin with a main focus on reaching out to other creative industries including fashion, film, design, games and print.
- Kultur Räume Berlin “Culture Spaces Berlin” (Senate Department of Culture and Europe, in association with real estate service providers and the independent art/culture scene): Kultur Räume Berlin regularly offers subsidized spaces for working, production and presentation to Berlin professionals of all artistic disciplines. Kultur Räume Berlin provides consultation for artists of the independent scene in Berlin on the topics of workspaces, loss of their spaces, as well as the process of applying for a space.

Appendix | Jurisdictional Review

LONDON, ENGLAND

Population: 8.9M



Union Chapel, London (Photo: © Union Chapel Website)

Description:

London is a major international hub for music, as it is home to world renowned music companies, artists and venues. There are a wide variety of supports for artists and the industry on the city-level, as well as nationally. Additionally, there is a healthy network of grassroots organizations that are supported by government.

London was examined because it is a metropolis with a rich cultural landscape. London and the United Kingdom more broadly, have also faced similar challenges as Toronto in terms of venue closures and loss of music spaces.

Key Music Support Organizations:

- [Music Venues Trust](#)
- [Busk In London](#)
- [London Music Fund](#)

Key Interventions:

- Busk in London (Found in Music, Mayor of London): An initiative which helps to support street performers by tackling misconceptions about buskers and encouraging landowners to embrace street performances and provide appropriate space.
- The Grassroots Venue Tickets platform (Music Venue Trust UK): In 2016, Music Venues Trusts and Ticketmaster partnered on the “The Grassroots Venue Tickets” platform, which allowed for increased revenues from ticket sales for grassroots venues. In 2021, the platform was upgraded and an improved commercial deal was made that allowed for venues to receive a 50% rebate on all bookings.

Appendix | Jurisdictional Review

NANTES, FRANCE

Population: 303K



Le Ferrailleur, Nantes (Photo: © Le Ferrailleur Website)

Description:

Nantes prioritizes culture as a lever for economic development, therefore efforts are made to support the creative and cultural industries. The city is home to Trempo, a unique structure dedicated to the practice, creation, training, production and dissemination of musical emergences.

Although much smaller in population than Toronto, Nantes was examined because of its dedicated music organizations, partnerships with other jurisdictions and the training and professional development opportunities for musicians.

Key Music Support Organizations:

- [Trempo](#)
- [Nantes Métropole and the City of Nantes](#)

Key Interventions:

- Nantes Reykjavik Cross Residency for Musicians (The Institut français, the City of Reykjavik, the City of Nantes, Iceland Music, Mengi [Reykjavik] and Trempo [Nantes]): A program that offers opportunities for artists living in both regions to work, create and produce music for a period of two to three weeks in the other region. The goal is to build future collaborations between the artistic communities of the two cities.
- 360 (Trempo): A program dedicated to career development that offers over a year of artistic support (e.g., stage residencies, accompanied rehearsals, artistic productions in the studio, concerts at national festivals, approaches to cultural action), recommendations to professionals (media, broadcasters), access to a training catalog and use of Trempo-owned studios.
- Slash (Trempo): A training program dedicated to a selection of five emerging professional artists. The objective is to acquire general knowledge of the music industry, to create career management tools and to obtain the keys to understanding a constantly evolving music ecosystem.

Appendix | Jurisdictional Review

REYKJAVÍK, ICELAND

Population: 131K



Gamla Bíó, Reykjavík (Photo: Kaleo In Concert - Gamla Bíó 2014 | © Matthew Eisman)

Description:

Iceland and Reykjavík more specifically, boasts a wealth of musical talent across several genres, despite their relatively small population size. Established in 2017, Reykjavík Music City acts as the facilitator between stakeholders in Reykjavík's music industry and helps support existing activities and create new opportunities.

Reykjavík was examined because of the efforts made by Reykjavík Music City in tackling issues relating to music space, as well as their programs encouraging the intersection between music and innovation.

Key Music Support Organizations:

- [Reykjavík Music City](#)

Key Interventions:

- Nantes Reykjavik Cross Residency for Musicians (The Institut français, the City of Reykjavik, the City of Nantes, Iceland Music, Mengi [Reykjavik] and Trempe [Nantes]): A program that offers opportunities for artists living in both regions to work, create and produce music for a period of two to three weeks in the other region. The goal is to build future collaborations between the artistic communities of the two cities.
- Firestarter (supported by Reykjavik Music City, Iceland Music Export and Icelandic Startups): A music accelerator program to support music entrepreneurs by providing resources and tools to develop creative business opportunities.
- The Music Venue Improvement Fund: A fund that supports small and medium-sized live music venues to renovate and improve their facilities, stage equipment and accessibility.
- Music Moves Europe: Co-operation of Small Music Venues: Reykjavík Music City and a consortium of small music venues in the city are working on a 14-month project to secure a sustainable future for small music venues in Reykjavík.

Appendix | Jurisdictional Review

AUCKLAND, NEW ZEALAND

Population: 1.5M



The Power Station, Auckland (Photo: Dead Letter Circus. the Powerstation | © Sara/Flickr)

Description:

In terms of music, Auckland is New Zealand's gateway to the world. Music and the city's talented musicians and artists contribute to the diversity of Auckland. Furthermore, music and its development, is key to Māori and Pacific cultures and an important vehicle for sharing untold histories, stories and emotions.

Auckland was examined because of their programs that foster professional development and opportunities for collaboration across cultural sectors. Additionally, like Toronto, Auckland's residents span 220 ethnic groups and are incredibly diverse.

Key Music Support Organizations:

- [Auckland UNESCO City of Music](#)
- [Auckland Unlimited](#)

Key Interventions:

- **Young Gig Makers (Auckland UNESCO City of Music):** An initiative that supports young, aspiring music event organizers and musicians to present an all-ages concert or music performance in the Auckland region. Program participants are awarded with a micro-grant plus access to in-kind technical support and equipment.
- **Equaliser (EQ) (Auckland UNESCO City of Music and Women In Film & Television and supported by the NZ Music Commission, NZ On Air, Sony & Aputure):** A grant and a mixed workshop/seminar/network format that provides professional development, mentorship and an ongoing network support to female music and screen sector professionals. Successful musician applicants are paired with successful director applicants to produce filmed content (music video, interstitials, visualizers, etc.) to support the released music.

Appendix | Jurisdictional Review

SYDNEY, AUSTRALIA

Population: 5.4M



Enmore Theatre, Sydney (Photo:© _brookmitchell/gettyentertainment)

Description:

Sydney is Australia's commercial industry hub; however, it is also home to many grassroots initiatives and a community-focused, local industry. The city has produced many nationally and internationally renowned artists.

Sydney was examined because, like Toronto, it is currently experiencing growth and is the epicentre for the national music industry. Furthermore, the City of Sydney is involved in enacting special policy and projects that will help the local music industry thrive.

Key Music Support Organizations:

- [City of Sydney](#)
- [MusicNSW](#)

Key Interventions:

- Rehearsal Space for Students and School Groups (City of Sydney): This initiative is part of the City of Sydney's live music and performance action plan, which aims to support local musicians and the live music scene. It provides a list of rehearsal spaces that are available for students and budding musicians, as well as easy access to book and secure space.
- Special Entertainment Precincts (New South Wales): A 2021/2022 pilot project that will allow local councils to establish special entertainment precincts to boost live music and performance and help the nighttime economy grow. The state government will work with City of Sydney, Inner West and Lake Macquarie councils as part of the establishment of special entertainment precincts.

Appendix | Jurisdictional Review

VICTORIA (STATE), AUSTRALIA

Population: 6.7M



Palais Theatre, Melbourne
(Photo:© Palais Theatre Facebook)

Description:

The state of Victoria is Australia's most densely populated state and is home to a substantial music network. The capital of Victoria, Melbourne, has a vast and eclectic music scene and a booming live music ecosystem.

Victoria was examined because of the efforts lead by Creative Victoria and the Victoria Music Development Office and their many programs that address similar challenges as Toronto surrounding space and professional development.

Key Music Support Organizations:

- [Music Victoria](#)
- [Victoria Music Development Office](#)
- [Creative Victoria](#)

Key Interventions:

- Experts In Residence (Victoria Music Development Office): A program that provides small music businesses in the State of Victoria access to professional services and expert advice from business streams including legal, HR, finance, artist management, digital marketing, grant writing, strategic planning and coaching.
- Good Music Neighbours (Creative Victoria): A statewide grant program that supports venues in providing premium quality sound for audiences and performers while also managing external noise levels.

Appendix | Jurisdictional Review

AUSTIN, TEXAS

Population: 961K



Cedar Street Courtyard, Austin (Photo: The Spazmatics at Cedar Street Courtyard | © Visit Austin)

Description:

Austin's official slogan is "Live Music Capital of the World" because of the volume of music venues and live music performances. The city is a hub for young musicians and celebrates a range of genres and music scenes. Austin is also known internationally for music festivals like South by Southwest (SXSW) and Austin City Limits.

Austin was examined because of its reputation as a music city and because of its success in attracting musicians and creating an environment for live music venues to thrive.

Key Music Support Organization:

- [Austin Music Office](#)

Key Intervention:

- Dedicated Online Presence and Active Social Media: The Austin Music Office has active social media accounts, separate from the jurisdiction's principal, centralized online presence.

Appendix | Jurisdictional Review

DENVER, COLORADO

Population: 716K



Levitt Pavilion, Denver (Photo:© Levitt Pavilion Facebook)

Description:

Although perhaps not as recognized as other hubs in the United States, Denver has a very active music scene with a thriving ecosystem of live music venues. The city has goals of continuing to grow sustainably as a global music city.

Denver was examined because of efforts by Denver Arts & Venues to assist performance venues thrive and reduce closures, especially in unpermitted spaces.

Key Music Support Organization:

- [Denver Arts & Venues](#)

Key Intervention:

- Safe Occupancy Plan (Denver Arts & Venues, Denver Community Planning and Development and the Denver Fire Department): A conditional building occupancy program for unpermitted/DIY performance venues and other creative spaces. This program was designed to ensure safety, limit displacement and allow for extended deadlines to achieve code compliance.

Appendix | Jurisdictional Review

SEATTLE, WASHINGTON

Population: 737K



Showbox, Seattle (Photo: © Showbox Website)

Description:

Seattle has a long history as a music city. Although known as the birthplace of grunge, Seattle is also home to many bands, labels and venues across many genres.

Seattle was examined because of its City-run music friendly programs that encourage professional development for young musicians and help break down barriers for performers and venue owners.

Key Music Support Organizations:

- [Seattle Office of Film and Music](#)
- [Seattle Music Commission](#)

Key Interventions:

- Musicians Priority Loading Zones (Seattle Office of Film and Music): A low-cost, phased approach to make it easier for musicians to load in and load out at live music venues around the city.
- City of Music Career Day (Seattle Office of Film and Music): A free, annual, one-day educational program that provides educational opportunities for young people, ages 16-24. The program provides direct access to music industry professionals through networking, experiential learning, engaging workshops and performance opportunities.

Appendix | Jurisdictional Review

HAMILTON, ONTARIO

Population: 570K



The Studio, Hamilton (Photo: © The Studio Facebook)

Description:

Hamilton has a growing vibrant music scene. The city is the sixth largest cluster of music businesses in Canada and recognizes the importance of a healthy music industry to the economy.

Hamilton was examined, not only because of its proximity to Toronto, but because of the introduction of music friendly policies.

Key Music Support Organization:

- [Hamilton Music & Film Office](#)

Key Intervention:

- Musicians Fair Payment Policy (Hamilton City Council): In June 2021, a policy was approved that supports and increases community awareness about the importance of paying musicians fairly for their performances.

Appendix | Jurisdictional Review

LONDON, ONTARIO

Population: 422K



The London Music Hall, London (Photo: Protest the Hero live at London Music Hall | © London Tourism)

Description:

London is a music education hub that has developed award-winning talent and is home to a robust live music ecosystem. In 2021, London became the first Canadian city to receive a UNESCO City of Music designation.

London was examined because of its proximity to Toronto and because of the London Music Office's dynamic online presence and active engagement.

Key Music Support Organization:

- [London Music Office](#)

Key Intervention:

- **Dedicated Online Presence and Active Social Media:** The London Music Office has established its own websites and has active social media accounts, separate from the jurisdiction's principal, centralized online presence.

Appendix | Jurisdictional Review

OTTAWA, ONTARIO

Population: 1M



The Rainbow Bistro, Ottawa (Photo: © The Rainbow Bistro Facebook)

Description:

- Ottawa has been increasingly investing in the growth of its music industry over several years, with plans to establish the city as a global music hub.
- Ottawa was examined because of its proximity to Toronto and because of various economic opportunities supported by the City for musicians and performers.

Key Music Support Organization:

- [Ottawa Music Industry Coalition](#)

Key Intervention:

- City Sounds (City of Ottawa and Ottawa Music Industry Coalition): the City paid artists to play a series of 24 free-to-attend music performances (over three weekends in August 2021) to encourage locals to attend musical performances and explore new neighbourhoods. City Sounds also supports paid performance opportunities for Ottawa musicians eager to play for live audiences and encourages the rebound of the live entertainment sector.