

**DEPARTMENT OF CANADIAN HERITAGE:  
CULTURAL POLICY REVIEW - SUBMISSION**

**WE'RE BEHIND THE PEOPLE  
BEHIND LIVE MUSIC**

**OCTOBER, 2016**

**MUSIC  
CANADA  
LIVE**

**The voice of live  
music in Canada**  
*La voix du spectacle  
musical au Canada*



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## Music Canada Live Recommendations and Priorities: Canada's Cultural Policy Review

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Music Canada Live is pleased to support the Department of Canadian Heritage's cultural policy review by making the following recommendations on behalf of Canada's **live music industry**. The recommendations respond directly to the over-arching goals of the review and are realistic, achievable and complimentary to broader music and cultural industry efforts.

Live music is an effective, important, diverse economic, social and cultural asset. According to the 2015 report from Music Canada, [Live Music Measures Up: An Economic Impact Analysis of Live Music in Ontario](#), music festivals alone contributed over \$600 million to provincial (ON) GDP and generated over 9,500 full time equivalent jobs. When looking at the entirety of music (including tourism) activity, the economic impact increases to **\$1.2 billion** and **20,000 jobs** – and this is just Ontario alone. According to the [Neilson Music 360 Canada](#) report released on June 16, 2016 **Canadians are attending more, and spending more of their money on live events.**

And the live music industry is growing quickly. Touring artists are seeing the majority of their annual revenues driven by live performance (as demonstrated by SOCAN's 2015 [Step Ahead](#) financial report which indicates that concert revenues have increased by 4.9% to \$39.6 million). The Federal government's recent commitment to revitalizing programs such as Promart and Trade Routes, dissemination programs such as those at the Canada Council for the Arts and other action our government has taken to strengthen our creative and cultural industries *all lean heavily on Canada's live music sector.*

Promoters, presenters and agents take *significant and regular* artistic and financial risk. They have helped to close the gap in terms of artist development since the music industry fundamentally changed in the late 1990's. Their stages upon which our musicians stand are central to content creation, artist's career development and their capacity to, ultimately, export high-quality product. They are critical to the function and flow of the broader music industry, as well as its supply chain. Without the stage there is no show. If there is no show, we lose not just the exponential economic and artistic gains, but the power of the live experience and the many social benefits gathering together in real time with family, friends and neighbours affords us all – the deepening of our quality of life in Canada.

The true breadth of live's economic, social and cultural weight is becoming apparent. The following key priorities serve both the sector in terms of its growth and potential, as well as the Government of Canada as it seeks to redefine the policies and programs that bring Canadian music to fans here at home and around the world.

*Music is an important, foundational component both to preparing workers with the necessary skills and competencies to take part in the digital and creative economies, and to attracting and retaining them in vibrant cultural scenes. Analysis by the Information and Communications Technology Council (ICTC) elaborates upon the critical link between music education, cultural scenes, and economic success at the individual and macro levels. i*

# Recommendations, Opportunities and Innovative Ideas

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## 1. A Federal Live Music Strategy

No other country in the world has a **national live music strategy**. The benefits of defining and implementing a comprehensive framework for Canada's live sector are many and include enormous potential for artists, record companies, managers and many other industry stakeholders with whom Canadian Heritage currently maintains close relations. The value fans, audiences, and our cities and towns accrue on economic, social and cultural levels is exponential. Live music is the heart beat of any and every local arts scene and creative economy:

*Music is playing an important role in Canada's success in the global digital economy. Global and local enterprises leverage several important music scenes in Canada to support the retention of creative talent. The best of that talent has often had a lifelong involvement with music through education and training as a creative outlet. Evidence-based research demonstrates that **creative and innovative people are attracted to vibrant music scenes**. The presence of a rich ecosystem of music sellers, performance venues, music press and, most importantly, working musicians in close contact with one another is one of the key determinative factors in attracting high-tech employers and employees. ICTC confirms, based on its significant research in the ICT ecosystem, that there is a strong correlation between vibrant music scenes and tech clusters. This leads to the conclusion that governments and organizations that support rich cultural environments are better positioned to attract employers in the high-tech sector, thus providing more high-paying, skill driven jobs for their citizens.<sup>ii</sup>*

Like the Province of Ontario who are currently creating a provincial live music strategy (a recommendation from the recently released Culture Strategy), Canada should develop a framework that will strengthen the country's position as a **global leader for live music**. The Federal government should, together with the live music industry, create a strategy that will:

- Drive music tourism and position Canada as a premier global destination for live-music and music tourism.
- Develop a national live music brand to promote Canada's live music sector to boost concert attendance, visitor spending, and economic impact.
- Foster grassroots development and expand live music opportunities for musicians to perform and thrive across Canada.
- Develop a co-ordinated national live music marketing and promotions plan.
- Create opportunities to promote music through measures such as new online resources.
- Support music education.

A strategy should be developed in partnership with the industry via a government convened taskforce led by Canadian Heritage and Music Canada Live. The development of strong partnerships between Destination Canada and other key departments should be prioritized.

Canada can establish itself as a world leader, firmly placing our *live music industry* on the international map by creating a federal live music strategy.

## 2. A National Economic Impact Analysis

With leadership from the Federal Government, we must measure the economic impact of the entirety of Canada's live music sector (with a focus on tourism impacts for future benchmarking) to fully understand how vibrant music scenes in a variety of markets drive: job creation, tourism development, brand building, **content creation** and artistic growth.

The data will enable to the sector to measure and support growth. [Live Music Measures Up: An Economic Impact Analysis of Live Music in Ontario](#), released by Music Canada in December 2015 captures never-had-before statistics that offer an extraordinary indication of the true economic importance of the broader live music sector.

This study could be similar to the very important UK publication "[Music Tourism: Wish You Were Here, the contribution of live music to the UK economy.](#)"

The study should be conducted by a third party research firm and managed by Music Canada Live in partnership with the Departments of Small Business and Tourism and Canadian Heritage.

## 3. A National Investment Strategy for the Concert Sector

Canada's concert sector should be supported via a thorough and comprehensive investment strategy that seeks to leverage the economic benefits the industry delivers. As we research and analyse data and statistics to drive future programs and funding, we recommend that the Department of Canadian Heritage revise the existing guidelines in current funding programs and frameworks such as the Canada Music Fund to better accommodate and include the commercial concert sector directly (both for and not for profit companies and organizations) and mirror the way the music industry functions *today*. Inclusion of the live music industry within the Canada Music Fund paradigm will increase and facilitate the **creation** of and access to a diversity of Canadian music for audiences everywhere by enhancing the sector's ability to **compete, lead and innovate** in domestic and international markets. Canada's live music stages play a critical role in the development of Canadian artists and their ability to reach these international markets. Live music stakeholders are crucial to the broader ecology of the Canadian music industry and formalizing a relationship will help both the sector and the Government achieve common goals.

The budget for the Canada Arts Presentation Fund, which has a different suite of goals and objectives, should continue to grow and support non-profit clients. It is an essential program, complimentary to others such as the Canada Music Fund's Music Entrepreneur Component (MEC).

*The live music community [in Ontario] is made up of **many SME's** (10,500, in Ontario alone) and directly accounted for a total of 7,300 full-time equivalent jobs (FTE) in 2013 while an additional 2,200 FTEs were generated indirectly through their suppliers and a further 1,000 FTEs were induced in the wider economy as a result of re-spending of labour income, totaling 10,500 FTEs generated by live music companies in Ontario's economy.<sup>iii</sup>*

## 4. A Federal Task Force Examining the Health and Well-Being of Canada's Live Music Incubators

Music Canada Live recommends that the Department of Canadian Heritage convene a government-industry led taskforce, to include the provinces, property development companies and the tourism sector, able to make and act on recommendations addressing needs, issues and challenges facing Canada's clubs, venues and concert halls. Strong, healthy venues grow and help to incubate our artists of today and of tomorrow. Their importance in and impact on building and sustaining the careers of Canadian artists cannot be

understated. Music venues are “cultural spaces, risk-takers, hubs of innovation and place-makers. They need to be recognised as such in policy documents. Music venues also need to enter the day-to-day conversations of economists, planners, licensors, police, tourism experts, culture professionals and music industry decision makers.”<sup>iv</sup>

*“Having a healthy music heritage and system makes cities look good, it increases tourism. It increases city branding. It makes young people want to stay. If you have a healthy venue, you’re going to have restaurants, minicab firms and bars. It enhances diversity – it doesn’t matter where you’re from or what sexual orientation you are; music is a communicator.”<sup>v</sup>*  
*Shain Shapiro, Sound Diplomacy*

## 5. Culture Satellite Account: Create New Sub-Domain “Live Music”

We recommend the Department of Canadian Heritage work with Statistics Canada and extract and set alone “live music” events and activities from the “Performing Arts” and “Festivals and Celebrations” sub-domains and create a new, singular sub-domain that captures the true economic output, impact on GDP and employment of all **live music** activity in Canada.

As a result of the current framework, live music numbers are underreported, underrepresented and do not reflect the true level of activity in the sector. We have a major opportunity for both industry and Statistics Canada. Live music has become ever more critical to the livelihood of artists. To not be able to quantify its true output puts touring artists at a major disadvantage. The actual size and economic importance of live music should be precisely known and stated, so that appropriate policies and programs can be built to support future growth.

## Conclusion: The Future is Beginning Now

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Live music, in all its extraordinary shapes and sizes, must have a well-defined and foremost presence in policies and programs developed through the cultural policy review. Live music stakeholders facilitate access to music for fans and audiences in our cities and towns, generate opportunities for artists, create jobs and help to drive tourism and local economies among the many other benefits highlighted in this brief.

Most importantly, live music stakeholders and their stages bring Canadians together. They innovate. They lead... and they are well-suited, able partners for this notable transition we are about to make as a nation into our own future.

Canada’s cultural policy framework, and Canadian’s themselves, will benefit directly the implementation of these recommendations.

Music Canada Live thanks Minister Joly for the opportunity to submit this document and looks forward to supporting the review process as it continues.

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<sup>i</sup> [The Next Big Bang](#), Music Canada (September 27<sup>th</sup>, 2013)

<sup>ii</sup> IBID, Music Canada

<sup>iii</sup> Live Music Measures Up, Music Canada (December 2015)

<sup>iv</sup> [London’s Grassroots Music Venues Rescue Plan](#), (October, 2013)

<sup>v</sup> [The Slow Death of Music Venues in Cities](#), The Guardian (September 9<sup>th</sup>, 2015)