

TO:	CHAIR AND MEMBERS STRATEGIC PRIORITIES AND POLICY COMMITTEE MEETING ON NOVEMBER 7, 2016
FROM:	KATE GRAHAM DIRECTOR OF COMMUNITY AND ECONOMIC INNOVATION
SUBJECT:	LONDON MUSIC STRATEGY – A YEAR IN REVIEW

RECOMMENDATION

That, on the recommendation of the Director, Community and Economic Innovation, the following London Music Strategy Update report **BE RECEIVED** for information.

PREVIOUS REPORTS PERTINENT TO THIS MATTER
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- The London Cultural Profile Report and London Cultural Prosperity Plan, Investment and Economic Prosperity Committee (IEPC), Feb 19, 2013
- London’s Music Strategy, IEPC, September 2, 2014
- A Zoning By-law amendment to permit amplified music, Planning and Environment Committee, May 30, 2016

BACKGROUND

Music plays an integral role in the cultural fabric of a city. London has a deeply rooted music history, and is continuing to grow as a recognized ‘Music City’ focused on the development and growth of the music sector. The music industry has a significant impact on the economy and the vibrancy of the community.

In September 2014, Council endorsed the London Music Strategy, developed by a group of Londoners engaged in the music industry. The London Music Strategy included twelve priorities and many specific actions. Council also approved funding to create a Music Office for a two-year period as a pilot project. Specifically, Council resolved:

- a) Council *ENDORSE IN PRINCIPLE* the London Music Strategy, as prepared by London’s Music Industry Development Task Force, attached hereto as Appendix “A”;
- b) Council *APPROVE* funding up to \$150,000 annually for two years on a pilot basis, for the position of “London’s Music Officer and/or Office”, to help assist with advancing the key priorities as outlined in the London Music Strategy;
- c) Funding for this project *BE APPROVED* as set out in the Sources of Financing Report attached hereto as Appendix “B”;
- d) Any future funding requests associated with this matter from the community *BE CONSIDERED* through the Strategic Funding Framework process as part of the annual budget process; and,
- e) City of London Corporate Investments and Partnerships and the Culture Office staff representatives, *BE DIRECTED* to serve as resources to assist with the implementation of the London Music Strategy, and report back on the status of the implementation of the London Music Strategy at the end of 2016.

This report provides Council with an overview of the first year of implementation of the London Music Strategy, fulfilling the direction of Council to report back before the end of 2016. It will

focus on the successes and challenges to date of implementing the twelve priorities of the London Music Strategy.

LONDON MUSIC STRATEGY

The London Music Strategy was created by London's Music Industry Development Task Force, comprised of 22 individuals who represented a range of sub-sectors, and all genres of music, within the industry:

- Independent Artists;
- Events and Venues;
- Artist and Business Management, Representation and Marketing;
- Music Creation;
- Associations, Organizations and Partners; and,
- Music Awards Programs.

The purpose of creating this strategy was to identify specific ways to strengthen London's music industry. The London Music Strategy contributes towards the implementation of London's Cultural Prosperity Plan, as well as furthering the vision, mission and areas of focus in Council's Strategic Plan (specifically, Strengthening our Community and Growing our Economy).

London Music Strategy: Twelve Priorities

As a group, the London Music Industry Development Task Team identified twelve (12) key areas of concentration outlined in the London Music Strategy:

1. Create a permanent ongoing volunteer Music Committee
2. Create a permanent London music position and/or office
3. Increase live music city wide
4. Enhance audience development and engagement
5. Study and update bylaws, policies, practices and procedures to create favourable business conditions for venues, festivals, performances and music businesses
6. Obtain investment for specific implementation strategies of LMIDTF key priorities
7. Future music presentation spaces
8. Co-ordinate and disseminate directories, websites and mailing lists, enhance the Music Resource Inventory
9. Create a marketing strategy with demographic study - increase advertising
10. Support music tourism
11. Actively seek and locate/relocate high tech and music businesses to London
12. More music residencies

The Benefits of Being a Music City

The London Music Strategy recognizes the benefits of music to London. Music is now being recognized as a significant economic driver in cities around the world. It provides direct employment opportunities to communities through industry specific jobs in the live music sector (venues, festivals, audio engineers) and music businesses (agents, managers, publicists). Music also creates compound spending through spinoff industries in the hospitality & service sectors (restaurants, hotels, retail, caterers, transportation, and stylists).

Cities recognized as 'Music Cities' also benefit from many indirect benefits, including attracting creative workers in technology, film, television, digital media and fashion. Innovators are attracted to cities that feature strong cultural industries appealing to many start-ups and entrepreneurs. Businesses may also relocate to cultural hubs in order to attract and retain employees. Music is

an economic driver and as such attracts the creative class of workers, who in turn, attract further development across other sectors including education, healthcare, research, technology and housing to cite a few.

KEY INITIATIVES OF THE LONDON MUSIC STRATEGY

Many exciting initiatives are underway for music in London as illustrated in Appendix “A” to this report entitled *“The Twelve Priorities of The London Music Strategy Update - November 7, 2016”*. More details about specific music related projects can also be found on the London Music Office website www.londonmusicoffice.com.

Overall highlights of this first year of activation have been summarized below in this report under the headings of:

1. A Review of Connections to Key Canadian, Provincial and Municipal Reports/Plans
2. Establishment of London Music Strategy Governance Oversight
3. Establishment of Music Industry Advocacy and Engagement
4. Current Assessment of the Music Industry in London
5. A Summary of First Year Successes and Challenges

1. A Review of Connections to Key Canadian, Provincial and Municipal Reports/Plans

Music is engrained into many broader strategic documents at the national, provincial and local level. The London Music Strategy remains closely aligned to other related efforts, and contributes towards these broader objectives. This section provides a summary of these strategies and objectives.

Music Canada

The Next Big Bang: A New Direction for Music in Canada

Music Canada identifies programs and policies designed to stimulate the development of Canada’s commercial music sector – and to drive growth and job creation in the economy at large. Music Education, Digital Innovation, Music Tourism, Export Expansion and Interconnected Tax Credits are identified as critical areas for development.

The Mastering of a Music City

This report represents a roadmap created by Music Canada, that demonstrates that communities of all sizes can follow to realize the full potential of their music economy. Truly global in scale, the report is the result of more than forty interviews with music community experts, government officials, and community leaders in more than twenty cities on every continent. The report finds that successful Music Cities with vibrant music economics generate a wide array of benefits for cities, from economic growth, job creation, and increased spending to greater tax revenues and cultural development.

Music Canada has since created two reports which highlight London as a Music City including *Live Music Measures Up: An Economic Impact Analysis of Live Music in Ontario* and *Music Cities Toolkit* which features a significant quote from the CEO of London’s Chamber of Commerce. Both reports point out the inherent value a music strategy has on a city’s economic wellbeing. Ontario is credited as having a \$1.2 billion live music economy, a figure the Ontario Chamber of Commerce recognizes as one of three economic advantages of Ontario’s economy. Additionally, live music is also credited with generating \$432.4 million in tax revenue through music business activities.

The Ontario Cultural Strategy

The Ontario Government recently launched its first Culture Strategy, which establishes goals (*Promote cultural engagement and inclusion; Strengthen culture in communities; Fuel the creative economy; and Promote the value of the arts throughout government*) and actions to promote participation in arts and culture, build on the sector's economic impact in communities across the province and help Ontarians tell their stories and express themselves. At the heart of this strategy is a strong musical presence. Under the goal of Fuel the Creative Economy the future creation of an Ontario Music Strategy is specifically referenced.

The Strategic Plan for the City of London 2015 – 2019

The Strategic Area of Focus “Growing our Economy” 1. Diverse and Resilient Economy - Strategy F Promote culture as a key part of economic growth and quality of life refers to both London’s Cultural Prosperity Plan and the London Music Strategy. The Strategic Plan specifically refers to the development of the London Music Strategy Implementation Plan and the establishment of music industry engagement mechanisms including music task forces, the London Business of Music Committee, community education and networking opportunities.

London’s Cultural Prosperity Plan

The London Music Strategy was created to be part of the implementation of London’s Cultural Prosperity Plan, which is a strategic document that provides a collective vision and direction for culture in London. The vision of this plan states that *“Culture is at the heart of our thriving and vibrant city. It is recognized by our city for its important role in building economic and community growth, attracting and retaining talent, informing municipal decision-making processes and elevating the profile of London as a regional cultural centre. Our culture is an expression of our identity, our shared histories, values, beliefs and traditions – and is enriched by the diversity of our city. It is alive and celebrated.”*

The London Music Strategy supports the implementation of London’s Cultural Prosperity Plan and all of its Strategic Directions of: 1.0 Strengthen Culture to build Economic Prosperity; 2.0 Support Cultural Programming 3.0 Leverage London’s Cultural Assets; 4.0 Celebrate and promote Culture. For example, the Building Economic Prosperity Direction 1.0 speaks to strengthening relationships between the cultural and economic sectors such as the music industry and to expand investment mechanisms for local cultural organizations and talent. Support Cultural Programming Direction 2.0 speaks to encouraging partnerships and collaborations to create unique and interesting partnerships including leveraging city wide cultural events. Leverage London’s Cultural Assets Direction 3.0 references developing more affordable studio and recording space for artists and recognizes Downtown London and Old East Village as important Culture Districts for London. Celebrate and Promote Culture Direction 4.0 speaks to building awareness about London’s vast array of cultural programming such as music, places for music, the use of technology and need for further promotion and investment.

London’s Economic Roadmap

London’s Community Economic Road Map sets out five year economic priorities, objectives and actions. Priority #3 *“An Exceptional Downtown and a Vibrant Urban Environment”* under the 5 year objective of *“Establish a rich variety of cultural, sporting and entertainment events and activities downtown and surrounding neighbourhoods”* includes the action plan step 10. *“Establish and implement strategic initiatives that align with the London Music Strategy and London’s Cultural Prosperity Plan”*. The driving force behind any effective economic strategy is

attracting and retaining talented people, including creative musical talent which London is developing at its post-secondary learning institutions. Livability and economic development are inextricably linked as a community's attractiveness to existing and future residents and workers is its competitive advantage. A strong music industry contributes to a vibrant, exciting community which is part of London's competitive advantage.

2. Establishment of London Music Strategy Governance Oversight

The Music Industry Development Officer (Cory Crossman) was hired by the City of London in November 2015. The Music Industry Development Officer is responsible for working with the London Music Oversight Committee composed of representatives from: the City of London Community and Economic Innovation Division of the City Manager's Office, Tourism London Inc. and the London Arts Council to implement the London Music Strategy. See Appendix C for the structural governance of the London Music Strategy.

3. Establishment of Music Industry Advocacy and Engagement

A major emphasis during the first year has been engagement of the local music industry. The Music Industry Development Officer has supported the creation of four (4) Task Teams led by community music industry leaders with a specialized area of focus: Musicians, Events & Venues, Education & Incubation, and Music Business Development. Each Task Team has selected two representatives to speak on their behalf at the London Business of Music Committee.

The London Business of Music Committee provides broader strategic guidance for London's music sector with input from Task Teams. Information is relayed up from Task Teams for input for larger committee perspective. The purpose of the London Business of Music Committee is to assist the London Music Oversight Committee and London Music Industry Development Officer with the development of the London Music Strategy Implementation Plan and to support the implementation of its initiatives.

4. Current Assessment of the Music Industry in London

The first of its kind, the London Music Census was initiated by the Music Office to provide a baseline of music data in order to better understand the music industry in London. The London Music Census was initiated by the Music Office with the assistance of a Music Analyst summer student (leveraged through funding of Canada Students Summer Jobs), during the summer of 2016. The opportunity for intensified growth of the music sector is highly plausible in London. Conditions exist for increased development but the need to implement change requires direction. The first step in understanding where the industry is moving is to understand the current state of affairs and mapping the musical assets that exist. The 2015 London Music Census captured the state of the industry while collecting community feedback.

Key findings of the London Music Census will be released in early 2017. Some primary themes emerged through the study including:

- London has Young Musicians - The census provided an initial indication that the large portion of musicians were between the ages of early twenties (20's) to mid-thirties (30's) playing what Music Canada has defined as the genre of 'Popular Music'.
- London has a Post-Secondary Music Education Advantage - It should be noted that London has a competitive advantage over other municipalities with many post-secondary music institutions providing training to music production students in Canada. However, there remains a concern that this talent does not stay in London. In 2015, London post-secondary institutions housed 875 music students enrolled at Fanshawe College, Ontario

Institute of Audio Recording Technology and Western University. Employment in music at post-secondary institutions accounted for sixty-eight (68) full time and six (6) part time employees plus an additional 46 contract workers. Given that a majority of graduates leave the community to find work, retaining an educated workforce is becoming increasingly important.

- Audience Development is needed - The same audiences frequent live music events. Baselines were established understanding income situations, number of performances, pay rates and other key factors that contribute to the music sector. This work has laid the foundation to build on.

London has a strong vibrant music community that with proper support, guidance and investment can flourish into a music center. As a city, London has advantages over other communities currently exploring music strategies. Continuing to lead in the field of music development, London is strategically positioning itself as a leader and innovator in the music industry. The London Music Census provided needed data to inform policy and tactical plans to maintain and advance London's music industry.

5. A Summary of First Year Successes and Challenges

Oversight Committee Support

The London Culture Office, London Arts Council and Tourism London all share a role in supporting music in London. These three organizations comprise the Oversight Committee for the Music Industry Development Officer, and work together towards strengthening music in London and implementing the London Music Strategy.

Branding

The role of a Music Officer is new and unfamiliar to many, and as such, branding and communications were an early priority. The London Music Office developed a distinct brand, starting with the creation of the logo. Social media channels were created across Facebook, Twitter, Instagram and YouTube, with the Music Industry Development Officer actively interacting with the 2,000 followers in these channels. Communication with the public also occurs through a monthly newsletter, a weekly Music Report with FM96, and regular media interviews. The ongoing rollout of www.londonmusicoffice.com serves as a 'one stop shop' for London's music community, offering resources and connecting initiatives of the London Music Oversight Committee partners. Content ranges from event listings, grant organizations, by-laws, venue map, local resources and educational opportunities among others.

Workshops

Over the past year numerous workshops, events and seminars have been hosted by the London Music Industry Development Officer. To date five (5) #MusicTalks seminars, two (2) artist boot camps, one (1) seminar day and seven (7) live music showcases have been presented by the London Music Office and in partnership with other organizations. These programs range from evening events to full weekend activities. Over fifteen (15) different music organizations have brought representatives to London through these activities. November and December still have additional events taking place bringing additional music organizations into the community. Throughout these workshops, events and seminars a total of thirty-four (34) London area artists were featured. Events ranged in scope from showcasing local artists to capacity crowds at Canadian Music Week to London youth artists showcasing on Dundas St. to London Country music artists unofficially kicking off Country Music Week.

Active Festival Season

The City of London had a very lively festival season in 2016 with the introduction of three (3) new marquee festivals including Trackside, London Blues Fest and London Beatles Fest. Intensification of an already vigorous festival season is evidence of a growing music sector in London. These events were fueled by a demand for niche event programming. Grassroots festivals popped up for the first time in 2015 including its A Fest and London Ska Fest. Each event focused on a specific genre of music servicing a need within the community. Furthermore, each of these events had a strong emphasis on working with local talent in their programming. Showcasing local artists at large scale events continues to build London's brand as a music destination.

London was spotlighted on a national scale in September in hosting Canadian Country Music Week, led by Tourism London and other partners. This was a key event not only because of the significant economic and community benefits, but also in providing London with another opportunity to demonstrate its capacity and ability to host national events. During Country Music Week, expectations were exceeded through re-invention of events resulting in increased audience engagement. Through the evolution of the Culture District(s), strategic planning of additional marquee events will begin taking shape.

Proposed Zoning By-law amendment for Amplified Music on Patios

In 2014, the Music Industry Development Task Team identified specific City By-laws as barriers to growth of London's music sector. One by-law that proved to contradict the development of London's Music Strategy is patio By-law 4.18 (5) which states "No amplified or electronic music (whether performed live or recorded), dancing or other forms of entertainment shall be permitted, with the exception of non-amplified acoustical music" on outdoor commercial patios.

With support from the Planning Service Area the City of London Culture Office introduced a pilot program to the City of London Planning and Environment Committee (PEC) that would allow dancing and amplified entertainment on patios for a trial period during August and September 2016. This initiative was approved by PEC and then later City Council after community consultation meetings and a public participation meeting.

Following Council approval two Ontario Municipal Board challenges were submitted from city residents. These OMB process is ongoing.

Culture/Entertainment Districts

London is currently reviewing the establishment of Culture & Entertainment Districts, including identify their purpose and potential locations. Council approved a Study Terms of Reference in October 2015. A Phase 1 report studied regulatory matters to optimize the staging of events in March 2016. This past September the 'high water mark' event, Country Music Week took place in London. Information was collected to incorporate into the Culture & Entertainment District study.

Challenges

Music is an innovative and resilient industry filled with entrepreneurs who diversify the economy and add to London's vibrancy. However, it is also a complex industry that spans many professional disciplines and genres. Coordinating and supporting the activities of a diverse, complex industry requires dedicated resources. Advocacy, coordination and technical supports are all needed in order to harness the full potential of the music sector.

The creation of a dedicated staff role has provided an opportunity to work alongside local stakeholders, and build relationships with provincial and national organizations, associations and agencies in a liaison role. Having a contact person rooted in both the industry and City Hall has proven to be a key ingredient. As London continues to establish itself as a leading Music City, these resources remain essential in order to stay ahead of the curve. As such, in May 2017, the Culture Office - Community and Economic Innovation will provide a recommendation report to will propose the creation of a permanent London Music Industry Development Officer position as part of the budget process for 2018. A business case would be presented for Council consideration at that time.

CONCLUSION

Music remains a vital part of London’s cultural, social and economic fabric. Londoners benefit from a having access to a wide range of music and talent, in many formats. As London continues to grow as a leading Canadian ‘Music City’, building upon the community’s current strengths and assets will be essential.

This report has presented a review of the first year of implementation of the London Music Strategy, and a summary of initiatives underway. The London Business of Music Committee, Task Teams, Oversight Committee and London Music Officer continue to work together to advance the direction of the London’s Music Strategy, and ensure that London continues to grow as a leading Canadian ‘Music City’.

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CC: London Arts Council, Tourism London, LEDC

ATTACHMENTS

- Appendix A – The Twelve Priorities of The London Music Strategy Update - November 7, 2016
- Appendix B – Terms of Reference for the London Business of Music Committee & Task Teams
- Appendix C – Structural Governance of London Music Strategy
- Appendix D – Music Office Workshops
- Appendix E – Weekly Report + Monthly Newsletters
- Appendix F – Social Media Overview (Country Music Week Case Study)