



## MEMO / NOTE DE SERVICE

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TO: Finance and Economic Development Committee

DESTINATAIRE : Comité des finances and du développement économique

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SUBJECT: **MUSIC CITIES SUMMIT**

OBJET : **SOMMET DES VILLES MUSICALES**

### **Introduction**

At the beginning of this term of Council, Council unanimously passed an economic development strategy that, for the first time, positioned the development of our music industry as a priority. In the past two years, several thrusts have dovetailed to create momentum around the significant expansion of our music industry, including extensive work and research done by our arts and culture staff, volunteers working on the

Megaphono festival, and a key research document published by the industry in 2015 using funding provided by the Ontario Music Fund.

Since the Council endorsement of this strategy, the City has provided startup funding to a new music industry coalition, the Ottawa Music Industry Coalition. Today, this coalition has over 90 paid members across Ottawa's talent, professional services, studios, music retailers, educators and more. Since its founding, it has done significant work to provide frequent professional workshops, industry networking events, and local and out-of-town talent showcases.

Momentum is building.

This activity is consistent with a growing movement around the world by cities to develop their music industries to improve the quality of life of residents. Various jurisdictions have recognized that strong music scenes and professional spheres help attract and retain knowledge workers, spur tourism, and generate economic activity. Multiple research studies indicate high economic multipliers. Ottawa is not alone in seeking to exploit this opportunity.

On May 7, I participated in the Music Cities Summit in Toronto, taking advantage of the taxpayer-funded trip to formally and informally meet with various Ottawa stakeholders gathered at the same time. Below, you'll find my notes from the various sessions. The day was a long one, and each session was information-packed. I cannot condense the full day into a single report, but invite readers to browse the notes below. I would, of course, be very pleased to discuss any of the points at greater length with my colleagues. There were around 100 participants in the day's event.

There are a few points that I would like to highlight, however. First, I was struck by the degree to which each of the municipalities represented see industry/government cooperation as key. Toronto Mayor John Tory's opening keynote speech was impressive. City governments in successful music cities have explicit music strategies, often with the personal leadership of elected officials. There is recognition in many of the jurisdictions that were represented that music industries are an ecosystem consisting of more than just talent, but all the supporting professional services, education, festivals/events, venues and retailing that surround the acts. There are challenges to cities that pursue music as an economic driver such as noise. Several participants made the key point that encouraging a music industry will touch on multiple city government considerations such as land-use planning, transportation, by-laws and tourism strategies.

I would be remiss not to note the participation of the City's own Kwende Kefentse in a very well-received panel at the end of the day focused on mid-sized cities such as Ottawa. I am proud to work with him.

I would be pleased if Council receives this report. I look forward to working with my colleagues to continue to strengthen our music industry to all residents' benefit.

(Note that I have appended one of the presentations by Beacon Economics' Chris Thornberg to this report. It is well worth reading).

## **Notes**

Arrived Friday to participate in meeting with Andrew Vincent and Mark Monahan (OMiC) and Amy Terrell (Music Canada) re: music association funding.

Performance Friday evening by Amanda Rheume and Jim Bryson.

Saturday morning.

Agenda with speakers, bios, etc. <http://musiccitysummit.com/agenda/>

## **John Tory Opening Remarks**

John Tory: "I'm not saying we will make this a music city; we already are."

Having musicians and artists attracts others. Creates a dynamic and innovative city. There is an artistic critical mass that attracts others. An important job creation engine in its own right. Toronto has a unanimously approved music strategy.

Toronto's geography (spread out) means they can't replicate Austin exactly. TO also has the same on-hold for 311 music.

Pursuing a different direction from Calgary, which has focused on building a building. TO focusing on events. Build on conferences like CMW. Looks to Austin where SXSW has a large conference component.

The TO music strategy evolved from a "sometimes clumsy" roundtable that invited all stakeholders.

TO engaged in a by-law review. Takes the sister cities strategy seriously. "We're taking our music alliances beyond paper".

Tory used to pace of business. Government is slower.

Personal leadership sometimes required. Notes specific instances such as an acoustic guitar festival that nearly wasn't allowed over noise concerns into which he had to intervene to ensure it proceeded. Afro-fest – work with his office to ensure it could proceed despite past challenges.

“It's a lot more than building a building...it has to be in the DNA.” Music as “part of the soul of any great city.”

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Discussion with TO councilor Shelley Carroll – Music advisory committee at first only had Mike Layton on it due to challenges reconciling impact of music and resident concerns. Majority of early councilors were suburban. Challenges associated with high costs of downtown public venues – Mel Lastman becoming popular since still accessible on transit but much lower rental costs.

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Keynote interview: Tim Arnold (UK, “Soho hobo”) on artist perspective of music city. “Music is an energy and that energy depends on the environment”

\*\*\* **Panel 1 – Music Cities, this ain't just about live**

Moderated by Ben Raynor w/ Bruce Merrill (Colorado), Kate Becker (Seattle), Andreas Kalogiannides (Toronto) and David Grice (Adelaide)

- Grice – a music city is one in which art can not just survive, but thrive
- Without culture, our cities are lifeless and boring
- A combination of art and supportive businesses
- Andreas – builds to suggest that implicit in Grice's comments is notion of ecosystem. It has to be diverse and there has to be music education
- Kate: Seattle has a formal music strategy, and focus is always on being inclusive.
- Merrill: not just cities. Colorado has a state-wide music strategy, and recognizes that it's also present at the neighbourhood levels where there are scenes and communities

- Notes that cities “should sometimes get out of the way.” Can be a challenge to get government involvement, though. “Why is the City involved in this at all? Isn’t this an industry issue?...The market is not taking care of this.”
- Cities are funding Arts (dance, visual art, etc.) but have shied from supporting popular music
- Ben Reynor: challenge is that popular music is seen as white and mainstream.
- Kate Becker: Important to recognize the underground component that may not always be onside with by-laws and permitting, but which generates the diversity. Careful not to use by-laws in a discriminatory way.
- David – government gets jobs and ROI.
- Reynor – government gets economic development.
- Discussion of important role of music education. Andreas notes it’s important to get politicians out to shows.
- Reynor “It’s not very rock and roll to cozy up to government”

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- **Keynote** by Lesa Ukman on sponsorship. Focuses on lifestyle brands and credit cards (Red Bull, Amex eg.)
- “Sponsors will brand your music city more than you can afford to.”
- Related anecdote – in Chicago, leveraged additional airport gates to get American Airlines to sponsor Jazz Festival.
- Suggests enlisting celebrities as ambassadors (Alanis? Paul Anka?)
- After presentation, discussed with her the NYC effort, funded by Amex, to get tourists to “eat in all 5 boroughs.”
- Importance of cause. “Your music organization is likely a non-profit, but it’s not going to be perceived as a cause.” Works with sponsors to work concretely on “cause”. “You can tie a lot of what you need doing in the community to sponsorship.”

\*\*\* **International Music City Connections: Nashville and its Sister Cities – Tracy D Kane**

- Nashville about music “soup to nuts”. \$10b/yr, 56,000 jobs across musical genres. Working to keep up with changes in music technology – build on its core IP foundation and ecosystem
- 2009 created a Music City Music Council – opportunity to leverage industry’s personal networks
- Kane involved with Sister Cities movement – international formal partnerships building on Dwight D. Eisenhower’s “citizen diplomacy” movement. Peace mandate. Business and trade is built on personal relationships. Several pillars: culture/art; humanitarian; civic; business/trade; education; sports. Edmonton and Nashville as sister cities. Nashville works to make music a part of each Sister City agreement. 10 years ago, Nashville effort was funded by government – 80%. Today, funding same in absolute terms, but 30% of overall pie.

**\*\*\* Telling the Story: The Impact of Music on Local Economies – Chris Thornberg, Beacon Economics**

**(Presentation appended)**

- Measuring success – need to make economic case for music cities to counter “NIMBY”ism and grandstanding”. I.e. Concert deaths spur politician backlash (grandstanding).
- Music is part of growing appetite for “real” experiences. Growth of music tourism.
- Backlash against music emphasis is noise, traffic, crime, pollution, higher use of social services, diminution of neighbourhood character, “immoral behavior”
- “Yes, there are some costs to bringing this type of thing into our midst” but need to do a cost-benefit analysis
- Pros: local spending, jobs, tax revenues, greater attendance at other events and venues. Long-term: improved quality of life, public relations, marketing for the region, eventual infrastructure improvement.
- Economic impacts can be direct, indirect and induced. Social positive impacts include support for at-risk workers, local competitiveness, work-live-play
- Need to tell a story around the data. “Data without a story is useless. What’s your story?”

- Argument that music is much better ROI than football, which cannibalizes internal spending rather than attracting out-of-town spending. Las Vegas EDC music event calculated to have \$337.8M in value v. CES at \$210.2M. Measure by the direct spending from the books, online surveys, on-the-ground surveys. Data is “political insurance”.
- Music plays into site selection for businesses. Business decision-making driven in large part by labour: costs and availability of skilled labour.” Need to ensure skilled people want to live there with right infrastructure and “night life”.

**\*\*\* The Planning Panel: Agent of Change (Part I). Shane Shapiro (mod), Alison Wenham, Jo Dipple, Mark Davyd, Paul Broadhurst.**

- Shapiro: 40% of grassroots venues in UK (~90) have closed I past 10 years.
- Challenge that each local Council does arts policy
- Mayor of London has established a Music Board
- Wenham: if trends continue “if you blink and it goes, you could wind up with a dangerous void.”
- Davyd, used to be club owner. Past 10 years, began to see iconic venues shutting down. Whole streets of closures. No measurement. Owners too busy fighting with each other over talent to cooperate. Anecdotal evidence. Pubs next to venues stopped putting on music. When venues close, so do music shops and record shops since music performance attendees are buyers and performers. “We don’t have enough people being inspired.”
- Planning law in the UK is national
- Dipple: lots of politicians love music, but weren’t paying attention. One shadow critic had eyes open
- Wenham: The City has fallen victim to property development, prices through the roof. Politicians coming to realize that “if nothing is done, London will be owned by Middle East absentee landlords.”
- Festivals are growing, especially boutique festivals.
- 2010 change: as-of-right change in permitted use from commercial to residential.

- Broadhurst: 54,000 homes need to be built over next 30 years in London – 600 new schools and colleges, 50% increase in transit capacity. One of the “great cities of the world” that continues to attract people
- 2008 study that foretold impact for venues. Economic downturn and Olympics diverted attention. No one piecing together the connections in the press articles.
- By 2010, London could no longer brag about the number of venues it had.
- Post-2012, stars began to align as data began to be put together, founding of Music Venues Trust. Action taken quickly. London Music Development Board create – “people who champion the nighttime economy”. Soon to have a “nighttime mayor”.
- Dipple: no one steps up to the Glastonbury stage on the back of an EP and a local gig. Need to have nurturing environment. “If we keep going, we won’t have a Bruce Springsteen.” Artists need to develop.
- Davyd: “The venues that booked Oasis and Adele are rapidly closing.”
- New as-of-right conversions see new residential in tension with existing venues. Multiple restrictions now on venues to mitigate impacts. Fewer planners on staff to deal with growing applications. But, created documents like an “A-Z of planning and culture”.
- Shapiro: need to learn how to speak with planners. “If we just preach to ourselves, we don’t get anywhere.”
- Broadhurst: romantic notion of venues as grimy, but, acknowledge that we need to know much more about what audiences now want.
- Broadhurst: production is 129% of ticket price. Rest supported by beer sales. Need a new model so that tix cover costs.

**\*\*\* If not Agent of Change, then What?**

Mark Garner (mod) Bobby Garza, Emmeneulle Hebert, John Wardle, Rainer Kern

- Hebert outlines support for Quartier des Spectacles
- Garza (Austin), importance of speaking land-use
- Hebert: challenges of getting people downtown. Transit. Parking. Montreal has 17 boroughs each with mayors, so lots of negotiations.



- Can we use smart city tech to, for example, adjust lights when everyone leaves the clubs at the same time?
- Garza – Austin in transition from being sleepy college town of the 70s. Need to understand different interpretations of the “public realm” – means wider city benefit or backyard?
- Waller: music industry needs to self-organize to be effective at working with government
- Garner: importance of talking about development. “The built form plays a critical role in this.”
- Hebert: Developers are building cultural approaches into their DNA. Note that developers not just private – municipal, too.
- Wardle (Australia) – incentives to build music into development. Exploring use changes for industrial to create cultural venues
- Garza – Mohawk Club. Pre-build conversation “hey, I’m your neighbour”. Introduce fact of being a venue to developer. Triple-paned glass, resident agreements that they’re moving next to a venue – opt-out clauses.
- Garza: “Be nosy.” Invite yourselves to planning meetings. “Hey, what are you guys meeting about? Have you thought about music?”
- Hebert, we need education. People will get used to having music everywhere. In the case of Montreal, they will expect it.

\*\*\* **Kevin McManus: Liverpool**

- Liverpool a UNESCO Music City. “Beatles do figure large, and that’s inevitable.”
- “Not a place anyone would want to go 20 years ago.
- Regenerated now. New cruise line terminal. Music tourism a key driver. 2008 Mayor on arts & culture “the rocket fuel of regeneration.”
- Nearly destroyed the Cavern, other sites. Municipal government didn’t think anyone would want to explore. Now, focus on the Beatles. “It seems like stating the bleedin’ obvious.”

- “Beatles economy” growing by 15% per year, but “still lots to learn from Memphis and Austin.”

### **Omar Lozano: Austin**

- Austin status built on iconic venues, deliberate strategy, SX. 22.6M annual visits.
- Marketing and story-telling through advertising. Strategy to get conventions to incorporate music. Social media

### **Festivals and Cities**

#### **Mike Tanner (mod); Catlin Whittington; Deavied Beame, Fruzsna Szep, Jonathan Wynn, Timotheus Wiesmann**

- Beame – can’t have successful festival without full integration with City. Transportation network, leveraging city communication channels.
- Wiesmann – a challenge for clubs when they’re not part of festival (presumably speaking to cannibalization)
- Wynn: multiple models for festivals based on orientation to the town – “confetti”, “core”, “citadel”
- Szep: “Festivals and cities strengthen each other.” Quality of festival more important than size. Need to cooperate with multiple municipal agencies.
- Catlin: agrees. 140+ employees now at SX. Be a friend to community associations in parks discussions. Relationships ebb and flow based on who’s elected.
- Tanner: question around whether Austin shift to ward model has made things easier?
- Taplin: Has been a good shift for the festival. Residents have just one politician to complain to and one Council voice.
- Wynn: festivals can change. “That’s a feature, not a flaw.” Eg. Newport
- Szep: organizers are “not politicians. We are cultural diplomats.
- Cites example of importance of cooperation. Lollapalooza Berlin lost Templehoff as a venue to refugee crisis logistics. City worked to make a core venue available.

### **Kevin Kane: Memphis**

- Memphis music history has been gradually re-built, largely without municipal funding
- 70% of Graceland visitors in 2013 were under 35.
- Gradual process of preserving music history, exploiting it. Start by saying. “Man, if we could just bring that back to life...”

### **Mid-size cities**

Ian Swain (mod); Jesper Mardahl, Joey Hendrickson (Columbus), Kwnede Kefentse, Natalie Bernadin

- Hendrickson, advantage of mid-size market: open-door policy with decision makers. Access by music industry.
- Kefentse: linguistic duality a strength. Independent communities now collaborating.
- Hendrickson – deliberate strategy on part of decision makers to foster open accessible conversations. “They want us to be collaborative”.
- Kefentse: Ottawa is between two large centres, doesn’t have a music “establishment”. Challenge of having so many large national institutions – disparity of access and “punching power” for grassroots.
- Hendrickson: Columbus – 400 musicians starting to talk, growing to 1000, online ways to vote for 10 programs to advocate for. Columbus has a “vibe” issue in trying to attract creative class. Actively seeking ways to integrate music tech into industry – local business to create tech, etc.
- Kefentse: Ottawa needs to make sure that industry sees value in whole-greater-than-parts approach. “Let’s get together to tell this story not just to each other, but everyone else.”
- First steps, OMIC, working with APCM on bilingual showcase. Ottawa has great funding for individual artists.
- Bernadin: smaller cities have communities around which things coalesce. For example, Winnipeg is small, but high musician per capita ratio.
- Hendrickson: the local music body has 26 members. That’s a lot but important to recognize diversity. Active discussion about music tech.

- Kefentse: people are doing things independent of any one music orientation. Innovative creation of IP and products.
- Hendrickson: in Columbus people like the “mid-west egoless vibe.”

Councillor Jeff Leiper

Document 1 – The Mastering of a Music City – Measuring Success: Why and How