



HAMILTON MUSIC INDUSTRY STUDY

STRATEGIC MUSIC BUSINESS PLAN

Table of Contents

1. Introduction	10
About Sound Diplomacy	10
2. Hamilton's Music Ecosystem	12
2.1 Music in Hamilton	12
2.1.1 Hamilton Snapshot	12
2.1.2 Hamilton's Music Industry	13
2.1.3 Canada's Music Industry	14
2.1.4 The Global Music Industry	15
2.1.5 COVID-19	16
2.1.6 Overview of Local Regulations and Policies	18
2.1.7 SWOT Analysis	24
2.2 Literature Review	27
Transforming Hamilton through Culture: The Cultural Plan 2013	27
Hamilton Music Strategy Background Report, 2013	28
Hamilton Music Strategy, 2015	29
Hamilton Tourism Strategy 2015-2020	33
Live Music Measures Up	34
A Vision for Ontario's Live Music Industry, 2018	35

The Impact of COVID-19 on Canadian Independent Music, 2020	37
2021 Live Music Industry Recovery Plan	39
2.3 Operations and Zoning	40
2.3.1 Support for Music Industry	40
2.3.2 Entertainment District	41
2.3.3 Agent of Change	41
2.3.4 Transport and Parking	41
2.4 Licensing and Regulations	42
2.4.1 Liquor Licensing	42
2.4.2 Events	43
Fair Pay	44
COVID-19: Events	44
2.4.3 Noise	45
2.4.4 Busking	46
2.4.5 Environmental Sustainability & Recycling	46
2.5 Music Education	47
2.5.1 K-12 Programs	47
2.5.2 Tertiary Programs	50
2.5.3 Independent and After School Programs	50
2.6 Funding Support	51

2.6.1 Municipal Funding	51
2.6.2 Provincial Funding	51
2.6.3 National Funding	53
2.6.4 Incentives	57
2.6.5 COVID-19	58
2.7 Music Tourism and Branding	60
3. Comparative Analysis	62
3.1 London, ON	62
London Music Strategy	62
London Music Office	63
Music, Entertainment & Culture Districts	64
Forest City London Music Awards	66
COVID-19	67
Lessons for Hamilton	68
3.2 Kingston, ON	69
Leadership	69
Music Education Programs	69
Regulations	70
Kingston Arts Council	70
COVID-19	71

Lessons for Hamilton	72
3.3 Brooklyn, NY	72
Mayor's Office of Media and Entertainment	72
Nightlife	73
Busking and Public Performances	73
Career Development	75
Youth Outreach and Diversity	75
COVID-19	77
Lessons for Hamilton	77
3.4 Huntsville, AL	78
Huntsville Music Board and Music Officer	78
Regulations	79
Huntsville Music Audit and Strategy	80
Non-traditional Spaces	80
COVID-19	81
Lessons for Hamilton	81
3.5 Austin, TX	82
Leadership	82
Noise Ordinance and Red River Pilot Program	82
Industry Initiatives	83

Promoting Local Artists	84
Alternative Resources for Artists	84
COVID-19	85
Lessons for Hamilton	87
4.1 Actions and Recommendations	89
Hamilton Music Strategy: Where We Are Now	89
4.1 City Policy and Supportive Infrastructure	91
Recommendation 1: Investigate/Define the Role of a Music Officer Position	91
Huntsville Music Officer Job Description - Huntsville, AL	92
Recommendation 2: Review Music in Hamilton Webpage	94
London Music Office Website - London, ON	95
Recommendation 3: Conduct Periodic Audits of the Local Industry	95
Melbourne Live Music Census - Melbourne, Australia	96
Recommendation 4: Advocate for Friendlier Noise and Alcohol Ordinances	97
Rembrandtplein's 24-Hour Licensing - Amsterdam, Netherlands	98
Recommendation 5: Review Agent of Change Policy	99
Agent Of Change - Austin, US	100
Recommendation 6: Enforce City-Wide Artist Compensation Policy	101
Paying The Artist - Nationwide, Ireland	103
Recommendation 7: Promote the City's Busking Policy	105

Street Performers Bye-Laws - Dublin, Ireland	106
Recommendation 8: Maximize Spaces around the City	107
Just Add Music Permit - San Francisco, California	108
Recommendation 9: Improve Transportation Around Local Shows	109
Night Network Transit - Melbourne, Australia	110
4.2 Talent and Professional Development	111
Recommendation 10: Create a Working Group for Minority and Indigenous Musicians	111
Women In Music - Nationwide, Canada	112
Recommendation 11: Advocate for Incentive Schemes for Music Businesses and Projects	112
Louisiana Tax Credits - Sound Recording Investor Credit	114
Recommendation 12: Create a Series of Professional Development Resources	115
Music BC's How-To From Home Series - British Columbia/Digitally Global	116
Recommendation 13: Support Accelerator and Incubator Programmes	117
Synthesizer - Tel Aviv, Israel	119
Recommendation 14: Implement Affordable Housing and Creative Space Opportunities	120
Cultural Space Agency Public Development Authority - Seattle, WA	121
Recommendation 15: Create a Music Industry Jobs Board	122
Arts For La - Los Angeles, California	123
Recommendation 16: Expand Access to Music Industry Internships and Apprenticeships	124

Sound Thinking - New York City, New York	125
4.3 Marketing and Branding	126
Recommendation 17: Promote Local Music amongst Locals, Young Professionals, and Visitors	126
SEATAC's Experience The Music Programme - Seattle, Washington	126
Recommendation 18: Create a Music Destination Campaign	127
Come Hear Nc - Statewide, North Carolina	129
Recommendation 19: Create a Music Export Programme	130
Music Export Memphis - Memphis, Tennessee	131
4.4 COVID-19 Recovery and Long-Term Funding	133
Recommendation 20: Extend and Expand Existing Investment and Recovery Plans	133
Showcase BC - British Columbia, Canada	135
Texas Accountants And Lawyers For The Arts - Statewide, Texas	136
Recommendation 21: Create a Funding Pool from Existing Revenue Streams (Hotel Tax)	136
Hotel Tax Funding - San Francisco, CA	138
4.5 Recommendation Timeline	139
Extend and Expand Existing Investment and Recovery Plans	140
5. Conclusion	141
6. Acknowledgements	141
7. Bibliography	145

1. Introduction

The City of Hamilton has already made incredible strides towards recognizing, quantifying and supporting its music industry, setting a precedent for a city of its size. These efforts began with preliminary research for its 2015 music strategy, and included a census, mapping, stakeholder outreach, SWOT analysis and action plan. Now, the city is looking to implement an updated strategy, seeking to define a calculated and scalable approach that focuses on talent development and retention while recognizing the competition the city faces by nearby industry hubs such as Toronto and New York City. This document contains the groundwork for a new strategy, collating all regulatory information and initiatives and further benchmarking Hamilton against cities facing similar challenges of regional competition and destination branding.

It is important that the work undertaken throughout this project, as well as those new actionable items derived from the results, recognize the impact of the COVID-19 pandemic. Short-term goals should continue to prioritize support and recovery strategies, with the understanding that much of the effect will carry into the medium- and long-term music economy as fans and professionals alike adjust to new levels of comfort in crowds and new preferences for remote participation and digital integration. To date, many COVID-19 recovery initiatives have been dependent on provincial stay-at-home orders. Fundraising and grant schemes have carried on throughout the year, but program-based initiatives have been stop-and-go. This pause and reset due to COVID-19 presents an opportunity to shift to skills development and professional support initiatives that can be carried out virtually and, thus, uninterrupted, giving Hamilton's musicians and music professionals a competitive edge as the live entertainment industry opens up and finds its 'new normal'.

Recovery will be slow, and adjustments will need to be made, but if there is any industry that has proven itself time and time again to be adaptable to changes in consumer trends and advances in technology, it's the music industry.

This work would not have been possible without the experience and support provided by Hamilton Music Advisory Team (HMAT), Sonic Unyon, the Hamilton Chamber of Commerce, City of Hamilton, Hamilton Public Library, Supercrawl Productions, FACTOR, Ontario Creates, the Department of Canadian Heritage and Canada's private broadcasters.

About Sound Diplomacy

Sound Diplomacy is the leader of the global music ecosystem movement. As strategists for communities of all sizes, developers, foundations, large private sector organizations and governments; Sound Diplomacy provides cutting edge research and market expertise for

robust music and night time economy strategies in city, urban and development plans. Sound Diplomacy works in over 20 countries and counts the Mayor of London, City of San Francisco, Lendlease, Walton Family Foundation and City of Brisbane as clients. Sound Diplomacy also runs the leading global series of events featuring music and public policy, called Music Cities Events.

2. Hamilton's Music Ecosystem

2.1 Music in Hamilton

2.1.1 Hamilton Snapshot

Hamilton is a city that sits on Lake Ontario, approximately 60 km outside of Greater Toronto and one hour from the United States border at Niagara Falls. Historically an industrial city providing iron and steel for the nation, Hamilton's economy has since grown to include healthcare and education.¹ It is an enticing place for young professionals to move to, offering comprehensive transport routes to nearby hub cities such as Toronto and Buffalo, though the relatively high cost of living can be prohibitive.² It also boasts a broad selection of local cultural activities, such as a prime filming location, music festivals, art crawls, 15 National Historic Sites, sporting events and outdoor activities.

Hamilton is a very diverse city, with approximately 25% of the city's population made up of immigrants.³ It became a sanctuary city in 2014, the second in the nation after Toronto.⁴ Over 2% citizens are from Aboriginal descent, primarily composed of First Nations, Inuit and Métis people.⁵ There is also a small, but present French-speaking population, supported by French-language municipal resources,⁶ although Arabic and Italian are the most common non-English speaking communities.

	Hamilton ⁷	Canada ⁸
Population (2016)	747,545	35,151,728
Average Age (2016)	41.6	41
Gender Balance	49.2% male / 50.8% female ⁹	49.6% male / 50.4% female ¹⁰
Median After-tax Income (2016)	\$32,073	\$30,866

¹ Britannica (2021)

² Hristova, Bobby (2021)

³ Statistics Canada (2017a)

⁴ Craggs (2014)

⁵ Statistics Canada (2017b)

⁶ Statistics Canada (2012)

⁷ Statistics Canada (2017a)

⁸ Statistics Canada (2017c)

⁹ Statista (2021a)

¹⁰ Statista (2021b)

Business Establishments	15,256 ¹¹	1.23 million ¹²
Unemployment (2016)	6.6%	7.7%
Unemployment (November 2020; during COVID-19 pandemic)	8.1% as of December 2020 ¹³	9.4% as of January 2021 ¹⁴

Table 1: County Statistics

2.1.2 Hamilton's Music Industry

In Ontario, there is a sustained interest in music policy that has positively impacted cities like Hamilton¹⁵. The City of Hamilton's 2019 Creative Industries Sector Profile provides detailed information about Hamilton's music industry. Data from the profile offers a snapshot which shows that Hamilton's creative industries make up 11% of its total workforce and 6% of its businesses. Despite a 16% increase in sector employment figures, it is still considered an area of skilled labour shortage. That same year, the music industry itself accounted for 541 of those businesses and employed 7,725 people, 42% of the total creative industries workforce. Over half of these professionals fell into the age range of 25-44. At \$35,954, the median income for music industry professionals is higher than that in Ontario and Canada (\$34,273 and \$33,924, respectively), but it is not specified if this figure considers that many musicians also work in non-music sectors to sustain a steadier income while pursuing music. The report does state that, of those employed full-time in the music sector (excluding music creators themselves), 16% worked in the core music sector (primarily radio and television broadcasting), 42% held core support roles (primarily education) and the remaining 43% worked general support roles (primarily advertising and PR).¹⁶

With the fastest-growing branch of the American Federation of Musicians, Hamilton was ranked seventh in the world for independent musicians per capita and has the sixth-largest cluster of music businesses in the country. The majority of these businesses were self-employed entities without any additional employees, and 16.6% of the businesses had only four employees or less.¹⁷ Research performed in 2015 looking into Hamilton's music businesses and assets shows a number of music retail businesses, artists, sound recording businesses, educational institutions, promoters and venues in the city. However, there is a lack of supporting music professionals such as agents, managers and entertainment lawyers. The same study revealed the city to have approximately 200 live music venues, ranging in

¹¹ Canadian Business Patterns (2018)

¹² Statistics Canada (2019)

¹³ Mitchell (2021)

¹⁴ IANS (2021)

¹⁵ Ontario Music Cities (2021)

¹⁶ Invest in Hamilton (2020a)

¹⁷ Invest in Hamilton (2020a)

size from 50 seat capacity all the way up to FirstOntario Concert Hall's 2,193 capacity. Most are clustered in downtown Hamilton, although small clusters can also be found in east Hamilton and Burlington.¹⁸ Today, city officials estimate this figure to be around 100, although the full impact of COVID-19 in regards to permanent venue closures is still unknown.

A more detailed look at the local live music industry was published in 2020 via *A Case for Hamilton's Live Music Industry*. The report, which was based on 2018 figures and did not take the pandemic into account, calculated the city's Gross Domestic Product from venues to be CAD\$32.6 million. Of this, CAD\$2.6 million came from property taxes alone. The venues made CAD\$62.7 million, although only 2% of this came from ticket sales. Primary revenue generators were food, alcohol and space rental for events. Venues were shown to be operating with only a 4% profit margin. Further profiling of local venues showed most of them had been operating for at least 24 years, and 20% had been operating for over 40 years. With 1,100 full-time live music employees across the city, each venue had an average of 5 employees and an average staff salary of CAD\$44,200.¹⁹

The background report for the Hamilton Music Strategy recognizes that scale and affordability are large advantages for the city in terms of attracting and supporting artists. Its size makes the city an appealing option for aspiring artists and professionals, offering a manageable setting in close proximity to the Toronto industry hub. Its proven dedication to championing, supporting and promoting its arts also sets it apart from other cities. According to research conducted by the Martin Prosperity Institute analyzing the 2012 SXSW line-up, Hamilton came in the top 10 for representation when adjusted for size of total local population, beating larger cities such as Toronto, Montreal and New York City.²⁰ This is most likely due to the Canadian Independent Music Association's work to present artists via its Canadian Blast series. This level of opportunity creation and support can make a big difference in the experience of the artist or resident, and Hamilton has laid a strong foundation on which to base its next steps.

2.1.3 Canada's Music Industry

Canada is the 8th largest music market in the world, worth US\$1.45 billion in 2019.²¹ The recorded music sector grew 8.1% in 2020, a figure primarily attributed to an 18.2% growth in subscription streaming revenue.²² Canada's music publishing sector has had an average annual increase of 8.6% between 2016 and 2020, with revenues coming in at CAD\$277 million in 2020, of which 92% of this revenue happened in Ontario.²³

Ontario is a consistent leader in the national music industry, home to 44% of the nation's music publishing and recording jobs. Much of this is in the live industry, with approximately

¹⁸ City of Hamilton (2015a)

¹⁹ City of Hamilton Planning and Economic Development Department (2021a)

²⁰ City of Hamilton (2015a)

²¹ Ontario Creates (2021a)

²² IFPI (2021)

²³ Ontario Creates (2021b)

10,500 FTE jobs across Toronto's music venues. However, even prior to the closures brought on by COVID-19, Canada's venues were facing threats from gentrification and increased insurance costs. This effect is increasingly highlighted by the expanding 'music cities movement', which recognizes music as a tool for urban development and growth. Many cities are reassessing the relationship between the city regulations and their creative sectors. For example, in 2019, Toronto amended its noise by-laws to specify quantitative decibel limits and friendlier measurement tactics that take into consideration the context of the surrounding area.²⁴

More work is being done to highlight and support minority communities across the Canadian music industry. Following the global Black Lives Matter protests during the summer of 2020, many initiatives have sprung up to provide support and advocacy for Black artists, including Canada's Black Music Collective and the Black Music Action Coalition. These are complemented by organizations seeking to promote women in the industry, including SOCAN's Her Music Awards and Keychange, the global commitment for gender representation in music festival lineups.²⁵

Meanwhile, the Aboriginal Peoples Television Network (APTN) completed its National Indigenous Music Impact Study, the first all-encompassing study of its kind. Their research showed that Indigenous-led music contributed \$78 billion to the national music industry and accounted for 3,000 FTE jobs in 2018, but less than one quarter of those workers derive all their income from this work. It also brought attention to Indigenous-specific challenges, such as lack of access to resources and increased travel costs to tour or even perform.²⁶ More work will need to be done to address these challenges and promote equity moving forward.

2.1.4 The Global Music Industry

Despite the heavy impact of COVID-19 on the music and entertainment industries, the International Federation of the Phonographic Industry (IFPI) reported a 7.4% global revenue growth in 2020, with a total recorded music revenue of US\$21.6 billion. This marks the sixth consecutive year of growth for the industry, much of which can be attributed to streaming services. With a collective 443 million paid subscribers by the end of the year, streaming grew to account for 62.1% of the market share. Meanwhile, physical sales saw a 4.7% decline, and performance rights revenue saw a 10.1% decline. Changes in performance rights revenue can largely be attributed to the ongoing COVID-19 pandemic, which forced closures for venues and festivals around the world.²⁷

Globally, the music industry continues to struggle with issues of valuation, with many artists and professionals being asked to work for free or for exposure, and undervalued streaming

²⁴ Ontario Creates (2021b)

²⁵ Ontario Creates (2021b)

²⁶ APTN (2020)

²⁷ IFPI (2021)

service compensation offerings that prompt continued calls for increased transparency and fair payment to artists.²⁸ Large strides were made in China and Singapore, who passed measures to recognize public performance rights, but work is still being done around the world to tackle safe harbour loopholes, which have allowed unlicensed music to be uploaded to streaming platforms (for example, YouTube) without any liability to the host website.²⁹ Addressing this will be a key step in overcoming the value gap, or the growing difference between the cost of creating and marketing music and the cost to consumers of obtaining the music.³⁰

2.1.5 COVID-19

Live music is the financial stabilizer of many artists' careers. At half a cent per stream, artists need six million streams just to meet the annual minimum wage of \$30,000, many artists rely on ticket sales to offset the shrinking contribution of recorded music. This is a booming sector of the industry in terms of revenue. In 2016, 55% of Canadian music audience spending went towards live music (up from 51% in 2015). The remaining 45% of audience spending went towards physical product purchases and streaming subscription fees.³¹ By 2018's year-end report, live music accounted for 57% of total consumer spending, showing a small but steady increase in its share of total consumer spending.³²

However, the abrupt freeze of audience-based, in-person activities struck a huge blow to artists and venues around the world. By February 2021, 80 venues across the nation were forced to shut their doors permanently due to the pandemic.³³ Experts estimate that 64% of Canada's live music industry is at risk of closure before the economy has a chance to reopen, and artists have lost access to key resources for professional development and audience development via performances.³⁴

In February 2021, the Canadian Live Music Association (CLMA) published the Live Music Industry Recovery Plan to set the foundation for relief efforts as global economies begin to reopen. Prior to the COVID-19 pandemic, Canada's live industry was worth \$3 billion and supported 72,000 jobs, but many of these skilled workers sought employment elsewhere as their industry shut down indefinitely. Music Businesses were estimated to have lost 92% of their income in 2020, prompting a call to action and an extension of government-driven relief efforts. The CLMA also utilized the report to call for broader recognition of music venues as a sector most in need of relief, access to rapid testing equipment to boost safety and peace of

²⁸ IFPI (2021)

²⁹ Cooke (2021)

³⁰ Lawrence (2019)

³¹ IQ (2016)

³² Nielsen (2018)

³³ Bliss(2021)

³⁴ Weaver (2021)

mind at events when things do begin to reopen, along with the introduction of a multi-year fiscal rescue strategy targeted at live music industry recovery.³⁵

Although no official health organization has published or approved a reopening plan for music venues, Ryerson University's School of Creative Industries at FCAD (Faculty of Communication and Design) has published an extensive guide to safe reopening precautions, covering topics such as workplace screening, contact tracing, incorporating PPE, digitizing common patron processes for touchless experiences, food safety, green room and backstage hygiene and general building operations. Each section of the report gives best practice examples for those venues and businesses who have already incorporated COVID-19 safety procedures into their daily operations.³⁶ As vaccines begin to be distributed and recovery starts to become a more feasible option, these will be a vital stepping stone to making audiences, performers and supporting personnel feel safe.

³⁵ Canadian Live Music Association (2021)

³⁶ Ryerson University (2021)

2.1.6 Overview of Local Regulations and Policies

Although a full review of the city's existing regulatory and supportive infrastructure can be found further in this section, the table below provides a summary of key policies and how they are implemented in the city, as well as a best practice example for each item.

LOCAL INFRASTRUCTURE OR POLICY THAT SUPPORTS THE MUSIC INDUSTRY	IN PLACE?	HAMILTON'S INFRASTRUCTURE OR POLICY	BEST CASE
Night transport	X	Most transport ends around 10pm, with busier routes ending around midnight or 1am. In August 2021 all-day transit between Toronto and Hamilton via GO Train service in West Harbour will begin with service beginning around 5:00am and ending around 10:00pm ³⁷	Toronto's Blue Night Network is the most extensive nighttime transportation service in North America, with routes picking up after trains cease service between 1am-2am. Routes run approximately every 30 minutes until morning service resumes, and are spaced in order to keep 99% of the city within a 15 minute walk of a stop. ³⁸
Agent of Change	X	While not called "Agent of Change," Hamilton does have policies that protect live music venues from residential complaints. Agent of Change is an ordinance placing responsibility of noise attenuation in the hands of the newest developer to protect existing music venues from noise complaints.	San Francisco Mayor London Breed's amendment to Chapter 116 of the local ordinances states existing venues, so long as they are in keeping with existing noise laws, are protected from the complaints of any new residences, hotels or motels built nearby. ³⁹

³⁷ Peesker (2021)

³⁸ Novakovic (2017)

³⁹ City and County of San Francisco (2017)

Music Office	✓	Hamilton's Creative Industries and Cultural Development section oversees a number of functions including, but not limited to, music industry development, programming and industry engagement through their facilitation of the Hamilton Music Advisory Team (HMAT).	London, ON's Music Office coordinates promotional, educational and financial resources and initiatives for a similar sized local industry. ⁴⁰
City-led grants	X / ✓	The City Enrichment Fund is accessible to musicians and events organizers via the broader 'arts' category for individual artists or groups, festivals, events, and nonprofits, but this funding is only available once/year.	The Vancouver Music Fund, a collaboration between the City of Vancouver and Creative BC, works to disperse its \$300,000 to projects serving minority communities within Vancouver and nearby Indigenous lands. ⁴¹
Event permitting	✓	Event planning information is listed on the city website, although costs are not transparent.	The City of Ottawa maintains a 61-page PDF document outlining the event planning process from start to finish, with hyperlinked text to make additional information convenient and accessible. Topics include vendor licenses, crowd management, site plan drawing and environmental sustainability. ⁴²
Liquor permitting	✓	Permits are issued through the provincial body, The Alcohol and Gaming Commission of Ontario.	Because permits and laws are controlled provincially, there is no relevant local best practice example.

⁴⁰ City of London (2021a)

⁴¹ Creative BC (2021a)

⁴² City of Ottawa (2021)

Noise By-laws	X / ✓	Events with exemption permits must not exceed 60 dB(A) at point of reception or 90 dB(A) 10m from source. Hamilton's Entertainment on Outdoor Patios Pilot Project allows certain geographic areas to have music on patios, but even then the sound limit is lower than most other Canadian cities.	Toronto's 2019 amendment to its noise bylaws quantified measurement strategies by implementing specific decibel limits (the greater of 55dB(A) or ambient between 7am-11pm), redefining the point of measurement and taking ambient noise into consideration. ⁴³
Busking	X / ✓	Though Hamilton has a busking policy, it requires additional promotion and educational outreach as the affected population is not necessarily aware of its terms or conditions. ⁴⁴	Vancouver operates a permit program allowing amplified performances between 10am-10pm in certain high-traffic areas. Permits cost \$45 for four months or \$135 for one year. Permits are not required for unamplified busking throughout the rest of the city. ⁴⁵
Entertainment district	X	Although the City of Hamilton does not currently have a formal Entertainment District, an Entertainment precinct has been announced (refer to 2.3.2).	Montreal's Quartier des Spectacles contains 43 performance venues and an additional 31 exhibition spaces within 1 square km. Visuals, lights shows and art installations are integrated into previously unused or dilapidated spaces, and several open spaces now host free shows throughout the year. ⁴⁶

⁴³ Rancic (2019)

⁴⁴ Priel (2011)

⁴⁵ City of Vancouver (2021a)

⁴⁶ Quartier des Spectacles Partnership (2021)

Music workspace/ hub	X	There is currently no dedicated music workspace or Music Hub in Hamilton.	The Music District in Fort Collins, CO has 10 music-related businesses, and its offices are 80% music-related. Tenants have below-market rent. The district has soundproof rehearsal spaces, a variety of practice rooms, a beats lab, educational resources, networking opportunities and an Airbnb for touring artists. ⁴⁷ Though it is currently closed due to COVID-19, The District still hosts online events to support the creative community.
Economic Development Incentives	X	There are currently no incentives in place specifically for music-based businesses. Hamilton's incentives are mainly based on geographic location rather than sector or business type.	Tennessee's Scoring Incentives Program led by the Tennessee Entertainment Commission offers a rebate of up to 25% for qualifying expenses like payouts for Tennessee-based musicians, producers, engineers, recording studios, instruments, and other expenditures. Eligible music scoring projects must leave at least US\$25,000 in the State (or US\$50,000 in Nashville) to benefit from the incentive. ⁴⁸
Music tourism policy	X	There is no formal music tourism policy in place, although the Hamilton Music Strategy touches on the sector.	Austin, TX branded itself as 'The Live Music Capital of The World', and has a cultural tourism plan that is implemented alongside a music marketing strategy from the City's tourism agency. City-led music programs include concert series, local artist performances at trade shows, a comprehensive website with gig listings and professional

⁴⁷ The Music District (2021)

⁴⁸ Tennessee Entertainment Commission (2021)

			contacts and support with regulatory challenges via the Austin Music Office. ⁴⁹
Environmental Sustainability & Recycling	✓	Hamilton aims to achieve an 80% energy reduction by 2050. The city is a member of the Sustainable Business Initiative to reduce greenhouse emissions. In terms of music, all events must have a waste management plan in place in order to be issued a permit.	Lollapalooza has committed to sustainability and net zero emissions by placing recycling, composting and water bottle refill stations frequently across their festival site, promoting sustainable and socially responsible merchants on its grounds, calculating and offsetting carbon emissions, ⁵⁰ and donating portions of their profits to Chicago's parks projects. ⁵¹
Professional Development/Training	✓	Since 2017 Hamilton has held an annual Musician Entrepreneur Conference which offers practical career assistance to musicians. The City also hires local music businesses to offer free one-on-one mentoring and support for musicians, further aiding their development.	Located in Ryerson University, The Music Den is a free incubation program that provides guidance and support to entrepreneurs and innovators focused on the music industry. Anyone with an innovative idea for music businesses, technologies and services is eligible to apply to the Music Den and pitch their concept to the steering committee for consideration. The benefits from this incubator include mentorship, workspaces, audio and video facilities, and editing suites and equipment. ⁵²
Loading Zones	✓	Hamilton installed "Musicians Welcome" signs outside of local music venues across	Austin's Musician Loading Permits allow musicians to park in designated areas outside venues for 30 minutes before

⁴⁹ Visit Austin (2021a)

⁵⁰ Hieggelke (2014)

⁵¹ Rolling Stone (n.d.)

⁵² Ryerson University (2021)

		the city. In addition, venue owners have been provided with signs which musicians can place in their windshields to defer law enforcement while unloading. ⁵³	and after the show. Venues can apply for the permits online and are responsible for issuing them to and retrieving them from artists. ⁵⁴
Fair Payment Policy	✓	Hamilton's COVID-19 Economic Recovery Task Force, in collaboration with the Hamilton Musicians Guild, instituted a fair payment for city-contracted musicians. "Fair payment" is stipulated by the Canadian Federation of Musicians." ⁵⁵	The Musician's Union (U.K.) developed a Fair Play Guide and Fair Play Venue Scheme which seeks to "recognize good practice and stamp out the unfair treatment of musicians" by encouraging venues to adhere to their publicly accessible fair play guidelines, advising musicians on how to avoid exploitative performance expectations, and allowing musicians space to report on their positive and negative experiences with venues. Compliant venues received badges to publicly display. ⁵⁶
Resources for Music History and Research	✓	The Hamilton Music Archives at Central Library launched in May 2019. This archive chronicles Hamilton's diverse music history across a multitude of styles and genres. ⁵⁷	Liverpool uses its musical heritage to gain millions in tourist revenue each year. ⁵⁸ Liverpool has tours, exhibitions, and hotels that highlight The Beatles' legacy. The British Music Experience Museum displays memorabilia from artists and groups like Freddie Mercury and the Spice Girls, and has a specific section dedicated to

⁵³ City of Hamilton (2017)

⁵⁴ City of Austin (2021)

⁵⁵ Hamilton Musician Media (2021)

⁵⁶ Musicians Union (2019)

⁵⁷ Hamilton Public Library (2021)


⁵⁸ UK Music (2017)

			music attractions on their tourism website. ⁵⁹
Trademarked Branding	✓	The City of Hamilton developed a logo, officially owned and trademarked by the city, illustrating its embrace of music as a cultural and historical asset. In addition, there are city-managed social media accounts which promote and support the local music scene.	The Nashville Convention and Visitors Corp “sells and markets Nashville as Music City to the world...” Music is incorporated in everything from tourism campaigns to local architecture and signage. ⁶⁰

Table 2. City at a Glance

2.1.7 SWOT Analysis

The below analysis represents key takeaways regarding the state of Hamilton’s music economy developed through a series of surveys and workshops as well as extensive research. Though inexhaustive, the observations and accompanying recommendations are the result of input from a diverse group of stakeholders, consumers, and artists invested in the growth and success of Hamilton’s creative industries.

 <p>STRENGTHS</p> <ul style="list-style-type: none"> • There is a large pool of high caliber talent in Hamilton. 	 <p>WEAKNESSES</p> <ul style="list-style-type: none"> • There is a lack of local music promotion in local radio stations and
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⁵⁹ Visit Liverpool (2019)

⁶⁰ Nashville Convention and Visitors Corp (2021)

- Hamilton's proximity to Toronto is convenient for touring shows and traveling audiences to stay and/or visit the city.
- The City of Hamilton, the Tourism Department and Economic Development understand the value of music as a part of an economic development strategy.
- Hamilton's existing music strategy has helped improve the music ecosystem which has benefited many businesses and artists overall.

university stations need more support.

- Artist's financial sustainability has decreased. Although the city has passed a fair-wage policy for its own events, it is still outpaced by increasing property values and living costs.⁶¹
- The economic impact recovery of the music sector does not seem to be prioritized by the City.
- There is a perceived small contribution of private investments to the music ecosystem
- Lack of awareness for professional development infrastructure
- While there is branding to promote Hamilton as a music city, the music community is unaware or has not fully adopted and utilized the branding offered
- Lack of rehearsal spaces, creating-leaning office or coworking spaces and recording studios
- Public transportation services (including bus routes) make nighttime businesses inaccessible to some communities making it difficult for the music sector located downtown to engage with broader audiences such as communities uptown (mountains)
- Lack of mid-sized venues, which decreases the availability of

⁶¹ Hristova, Bobby (2021)

	performance space for artists that draw mid-level audiences
 <p>OPPORTUNITIES</p> <ul style="list-style-type: none"> • The performing arts activities in bigger cities are an opportunity for Hamilton to strengthen relationships with their music and cultural ecosystems. • Targeting traveling audiences from surrounding bigger city events to stay and participate in Hamilton's nighttime economy can increase local talent visibility. • Hamilton is less expensive than bigger cities like Toronto and Vancouver which poses opportunities to incentivize more work and accommodations in Hamilton. 	 <p>THREATS</p> <ul style="list-style-type: none"> • The effect of the COVID-19 pandemic on local venues has been a major challenge for live performances and events to plan for future functions. • The COVID-19 crisis has affected the platforms in which entertainment events are promoted and therefore, the depletion of media coverage or informed critique of the entertainment sector has decreased local events' and artists' visibility. • Hamilton's proximity to Toronto is challenging for Hamilton due to radius clauses, and the possibility of being overshadowed.

2.2 Literature Review

Transforming Hamilton through Culture: The Cultural Plan 2013⁶²

Hamilton's cultural plan was published in 2013, with the latest update and progress report published in 2017. The plan outlines eight goals, 12 recommendations and 78 actions (consolidated from over 250 recommendations) to help recognize and utilize culture as a building block of the city's brand and economy. The entire cultural project consisted of three phases, which include a mapping phase, a community engagement phase, and the resulting plan. The project was funded as part of the Capital Budget with the assistance of several Federal and Provincial grants. Background research for the report identified three major challenges for Hamilton's cultural leaders: funding, stability and accessibility. The three biggest opportunities were communication of arts opportunities, collaboration and building social capital.

The eight transformational goals into which the recommendations are divided are:

- Culture as an Economic Engine
 - Recognize culture as an essential tool in city building and plan for culture in our community
 - Develop cultural businesses
 - Invest in culture
- Downtown Renewal
 - Leverage culture as a tool in downtown and community rejuvenation
- Quality of Life Quality of Place
 - Develop and animate public spaces
 - Celebrate and preserve Hamilton's cultural assets
- Build Tourism
 - Enhance tourism development
- Neighbourhood Revitalization
 - Identify and develop culture as a key asset in neighbourhoods
- Build Community Identity, Pride and Image
 - Recognize and celebrate achievement in culture
- Encourage Welcoming Communities
 - Develop and facilitate cultural programming

⁶² City of Hamilton (2013)

- Creativity for All
 - Facilitate and increase access to and participation in cultural activities
 - Target youth for cultural experiences and work opportunities

Cultural planning has become a mainstream element of city-led strategy and Hamilton's plan earned national recognition from the Creative City Network of Canada for its "collaborative processes in public engagement ... and innovative approach relevant to the community." A 2017 update to the plan confirmed that 60% of the actions were complete, and an additional 11% were underway. The press release announced that a review and update would be completed at the plan's five-year anniversary in 2018, although no announcements have been made to date.⁶³

Hamilton Music Strategy Background Report, 2013⁶⁴

In 2013, as part of a growing recognition of the correlation between creative industries and economic development, the City of Hamilton directed its City Council to create a music working group in order to help define an official music strategy and assess the possibility of introducing a Hamilton Music Office. The full responsibilities of the working group involved defining the mission, vision and objectives of the strategy; collecting information on the local industry and its trends; facilitating connections between and communication with local stakeholders and the community; and acting as the go-between for the local music industry, the city and the Ontario government.

The initial work for this involved gathering music industry stakeholders, consulting with the local community and hosting an Open House to promote information-sharing. This foundational research and outreach resulted in the drafting of a SWOT analysis of the Hamilton music scene, which would later inform the full music strategy.⁶⁵ Standout items included:

Strengths:

- Recognition of music as a tool for economic development and accompanying government support
- Migration of creatives to Hamilton and retention of existing producers
- Historic and ongoing reputation of local music scene, including its festivals and events
- Proximity to Toronto
- Post-secondary education programs

⁶³ City of Hamilton Planning and Economic Development Department (2017)

⁶⁴ City of Hamilton (2015a)

⁶⁵ City of Hamilton (2015b)

Weaknesses:

- Lack of coordinated music strategy, to include marketing and representation
- Lack of funding
- Little perceived value in local music vs. commercial/traveling acts
- Lack of mid-sized venues and closure of existing venues over time
- Lack of networking opportunities
- Little K-12 music education

Opportunities:

- Collect the many significant music heritage points into a museum or center
- Create partnerships with post-secondary institutions to introduce internships and retain graduates locally
- Lower cost of living
- Develop a local brand to market to tourists and prospective business partners
- Take advantage of federal/provincial fundings and tax breaks/incentives
- Create a mid-sized venue in the downtown area

Threats:

- Proximity to Toronto risks Hamilton getting lost in the shadow
- Failure to recognize grassroots music industry in support initiatives
- Perception of danger in the downtown
- Other cities' increasing recognition of their local music industries makes for a competitive environment

Stakeholder outreach provided feedback for strategy-drafters, highlighting local desire for more diverse programming and recognition, more supportive city policies and legislature and more music in schools. The information collected in this report further informed the city's final Music Strategy, summarized below.⁶⁶

Hamilton Music Strategy, 2015⁶⁷

Hamilton's music strategy sets an early standard for recognizing the role music plays in the city. The strategy expands on Greater Ontario's Live Music Strategy, which aims to put the province's music scene on a global stage. The vision for Hamilton, as set out in the strategy, is

⁶⁶ City of Hamilton (2015b)

⁶⁷ City of Hamilton (2015b)

to promote a ‘thriving, creative and eclectic music scene’. It sets out four goals, each of which has its own set of objectives and further subset of actions. These are:

1. Strengthen the local music industry
 - a. Link with other major music initiatives, strategies and cities
 - b. Build connections within the music scene
 - c. Embed music in City of Hamilton initiatives
 - d. Provide tools to support music business development
 - e. Remove barriers to live music presentation
2. Grow audiences and appreciation of music
 - a. Brand Hamilton as a music city
 - b. Promote local music
3. Increase access to music experiences
 - a. Provide live music throughout the City
 - b. Encourage a diversity of venues for music
4. Cultivate music creation and talent
 - a. Celebrate Hamilton’s music legacy and potential
 - b. Involve youth in the music industry
 - c. Encourage strong music education

Measurable success indicators for these goals include growth in the number of local industry jobs, more attraction of music businesses and artists, rise in the number of live music venues, larger audiences at performances and more students in music education programs. Periodic updates were published from 2018-2020. The updates, which are a best practice example in transparency and accountability in and of themselves, outline initiatives and changes which were introduced as part of action items. To date, the following goals have been accomplished:

Year	Accomplishments ⁶⁸
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⁶⁸ City of Hamilton (2021a)

2018	<ul style="list-style-type: none"> • A Music Career Day, hosted in partnership with Mohawk College, helped students explore potential pathways in the music industry • The Musician Entrepreneur Conference featured a full day of free panels and workshops covering subjects such as funding, booking gigs, mental health and songwriting. • Free one-on-one mentoring sessions were offered to musicians and managers in partnership with Canada's Music Incubator to assist them with professional development. • Hamilton became the first municipality in the nation to be designated with the SOCAN Licensed to Play award as a recognition of fair pay to musicians. • A lunchtime performance series, Live Music Mondays, brought music to City Hall over the summer months, as well as an Evening Showcase coordinated alongside Canadian Music Week. • A video series was created in partnership with the Hamilton Public Library to highlight six local music professionals with diverse perspectives, backgrounds and musical connections. • Hamilton artists began creating displays for the Anne Foster Windows, a window display created by a Hamilton artist that celebrates and recognizes an element of Hamilton's musical past, present or future which rotate every four months. • The Music Strategy, HMAT itself and other music projects saw widespread local and national media coverage.
2019	<ul style="list-style-type: none"> • City Council approved and published a music-focused Creative Industries Sector Profile.⁶⁹ • The Hamilton Public Library Music Archive officially opened, presenting resources and memorabilia from over 100 years of Hamilton music history. • A social media campaign was launched featuring 20 different music industry professionals wearing 'Hamilton is Music' t-shirts to highlight the different sectors of the music scene. • The City launched a music blog series via its website, contracting local writers to create blogs on different aspects of the local music scene. This was promoted via social media. • A Hamilton Music Showcase was held at the Mills Hardware music venue, seeing 100 attendees in partnership with the City. • A Musician Conference was held during Small Business Week, offering insight on skills such as tour planning, electronic press kits and copyright. 18 speakers and 70 guests attended.

⁶⁹ City of Hamilton Planning and Economic Development Department (2019)

2020	<ul style="list-style-type: none"> • A virtual mentorship program was launched in partnership with Canada Music Incubator, giving Hamilton musicians access to three one-hour one-to-one mentorship sessions. Topics included grant writing, branding and negotiating fees. • The fourth annual Musicians Conference went virtual, and panel discussions were recorded and uploaded for online access. • The City began virtual business coaching in April to help businesses in various stages of development pivot their strategies in light of the pandemic. • CAD\$894,769 was distributed to 40 music-focused individuals and organizations through the City Enrichment Fund. • In partnership with Cobalt Connects, the City hosted Hamilton Shows Up, a virtual performance series featuring 22 artists and four hours of free programming. The City helped with promotional efforts and funded the first night of performances. • A temporary revision to the Music/Entertainment on Patios By-law allowed more public access to music on patios to aid in social distancing efforts. • The City offered a seed fund of \$7,500 and access to the top floor of the York Boulevard Parkade to help develop an outdoor event. The resulting program, organized by Supercrawl Inc., lasted four days and featured music, fashion and visual arts. • After being recommended by the Arts and Creative Industries working group of the Mayor's Task Force for Economic Recovery, the Mayor requested approval of a property tax relief scheme for the creative industries, such as live music venues. The City is still awaiting final approval. • Following a recommendation in 2019's Creative Industries Sector Profile, an economic impact analysis of Hamilton's live music industry was submitted to the city in June 2020 to help shape future planning decisions.⁷⁰
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Looking at the annual updates, it is clear that the City of Hamilton has been actively working towards the goals set out within its music strategy, with particular strides taken in performance opportunities and business development. More work can be done to increase access to music education for all levels of career development, connect the various music industry stakeholders to strengthen the industry's network and promote Hamilton's music scene outside of Hamilton to help build the city's brand.

⁷⁰ City of Hamilton Planning and Economic Development Department (2021a)

Hamilton Tourism Strategy 2015-2020⁷¹

The City of Hamilton published a tourism strategy in 2015 that outlined a five-year plan for increasing tourism; creating partnerships with industry stakeholders; building Hamilton's reputation as a destination; and facilitating economic benefits for the community. Hamilton's key strengths, as identified in this strategy, included its authenticity; proximity to Toronto and U.S. cities; transportation and hospitality expansion plans; and events infrastructure. Points of concern included lack of a central marketing campaign, competition with major nearby cities, and an image problem in regards to social issues such as wealth disparities between neighbourhoods, traffic, signage and connectivity.

According to the strategy, an estimated 2,300 residents worked in hospitality. Hamilton saw over 4.5 million visitors each year, bringing in an annual tourism revenue of \$359.5 million. At the time, only 4% of visitors stayed overnight, which is unsurprising considering only 1.9% of visitors come from Canada but outside Ontario, 1.6% come from the U.S. and 0.6% come from overseas. The foundational research for the strategy analyzed Hamilton's hotel statistics against other provincial destinations and found Hamilton had higher occupancy levels than average but a significantly lower average daily room cost, identifying the need to promote and value local assets.

By 2019, Hamilton saw a record number of tourists, and overnight stay figures had doubled.⁷² Consumer trends showed a shift in values towards being socially conscious and seeking authenticity and sentimentality. Tourism growth was attributed to a 'renaissance of the arts'; the city's heritage; significant investments in events infrastructure; natural scenery; hotel developments; and increased interest in experience-based tourism, such as ecotourism, culinary tourism, etc.⁷³ It is worth noting that music tourism was not mentioned as a sub-sector of experience-based tourism, although arts and entertainment is referred to throughout the strategy.

Festivals and events were identified as a key player in attracting visitors and defining a city as a cultural destination. The strategy calls to position festivals and events as a way of generating overnight hotel stays; schedule them for periods when business is typically slower rather than during existing holidays; and use them to showcase the city's unique offer. As part of this, the strategy calls on policy-makers to:

1. Attract, facilitate and develop events that attract visitors and contribute to the local economy
2. Create a comprehensive events calendar for public access

⁷¹ City of Hamilton (2015c)

⁷² Craggs, Samantha (2019)

⁷³ City of Hamilton (2015c)

3. Create an event hosting plan template and coordinate comprehensive planning and evaluation processes for each event.

Live Music Measures Up⁷⁴

Published in 2015 with research collected in 2013, the Live Music Measures Up: An Economic Impact Analysis of Live Music in Ontario report was the first study quantifying Ontario's live music industry and its impact on the regional economy. The industry hoped to build an economic profile in order to make strategic decisions for growth and measure its progress. In defining the live music industry, the report included managers, promoters, agents, venues and music-focused festivals. Artists were not included unless they were self-managed and could be defined as a de-facto music company. Research began by reaching out to industry organizations to track their revenue and expenses and build an outline of how the average business operates. This was followed by a survey which was completed by 372 live music companies across the province, an estimated 30% of the 1,240 total companies identified as being in operation across Ontario.

Results showed that Ontario's live music companies generated CAD\$628 million in 2013. Ticket sales generated 40% of that amount, while 28% came from donations, sponsorships and grants from government, corporate and private organizations. Profits for the provincial industry came to \$144 million that same year. Canadian artists accounted for 54% of all artist management revenue, making them worth \$34 million in artists management revenue. In fact, 67% of managers attributed their entire revenue stream to Canadian artists. Likewise, 46% of survey respondents attributed the entirety of their ticket sales revenue to Canadian artists, while only 10% attributed their entire revenue to foreign acts. Canadian artists generated \$75 million in ticket sales in 2013, 32% of total ticket sales revenue across all companies.

Nordicity identified 616 venues across Ontario which offered some form of live music programming to a combined capacity of 3.6 million people. The 558 festivals identified sold (either at a cost or for free) a total 15.7 million tickets to 13.7 million unique visitors. The study also counted 775 promoters across the province, boasting a combined total of 81,600 shows and 5.4 million ticket sales.

Ontario's live music companies had \$484 million in expenditures in 2013. Programming costs, such as artist fees, made up 26% of total expenditures, while fixed labour accounted for 21% of total expenditure. These figures were weighed as contributors to the live music economy as well as the greater music tourism economy. It was estimated that live music companies directly created 7,300 FTE jobs worth \$152.4 million in wages, as well as an additional 2,200 indirect jobs worth \$105.3 million in wages. The total estimated gross domestic product was \$582.5 million, 50.8% of which was direct. In terms of how live music affected tourism, it is estimated to have directly created 6,230 jobs worth \$213.6 million in wages, as well as an

⁷⁴ Music Canada and Nordicity (2015)

additional 1,720 indirect jobs worth \$100.8 million in wages. The total estimated gross domestic product was \$609.1 million, 52% of which was direct. Finally, Ontario's live music companies generated \$432.4 million in municipal, provincial and federal taxes, \$270.7 million of which came from tourism activity.

Responses from 71% of the survey participants indicated that they expected to see their revenue grow in the years following the report. Almost half of all respondents planned to expand activities across the country, and 36% of the survey participants indicated they planned to expand into the U.S. Tax credits and other funding streams were cited as key resources to facilitate growth; while the country's regulatory framework, such as licensing costs, was cited as the largest obstacle to growth. Additionally, increasing touring costs, competition with more large-scale productions and venues, changes in audience spending habits, and the red tape of hiring foreign talent were expressed as growing concerns.

A Vision for Ontario's Live Music Industry, 2018⁷⁵

After five years of research into the provincial live music industry and its impact and role in an increasingly digital world, the Government of Ontario published A Vision for Ontario's Live Music Industry. Building on the findings benchmarked in Live Music Measures Up,⁷⁶ the purpose of the report was to highlight and promote best practices, encourage industry collaboration and communication, and prioritize action items for government policy and the planned Ontario Live Music Strategy, which has not yet been published. Research and outreach was conducted by the Ontario Live Music Working Group (LMWG), which is comprised of representatives from Music Canada Live; the Ministry of Tourism, Culture and Sport; the Ontario Media Development Corporation; The Ontario Arts Council; Destination Ontario and several music industry professionals, such as venue owners, managers, promoters and festival organizers. A sub-committee, dubbed the Live Music Task Team, conducted community outreach to gather experiential feedback from those active in the live music industry. The report divides its findings and resulting recommendations into six categories: local music scenes, professional capacity, promotion & marketing, regulatory factors & government coordination, industry infrastructure, and impact measurement. These recommendations are:

Local Music Scenes:

- Create communication between municipal governments and live music stakeholders to encourage music-friendly city policies around issues such as noise, property taxes and alcohol.
- Foster more sector collaboration across different sized venues and events as well as promoters and organizers of various experiences.

⁷⁵ Ontario Government (2020)

⁷⁶ Music Canada and Nordicity (2015)

- Promote DIY spaces and events by raising awareness and introducing physical locations for them.
- Promote the grassroots music scene and its stakeholders to ensure equitable access to resources from both the government and the greater industry.

Professional Capacity:

- Create an online business resource portal through which to share success stories, best practices and other tools for growth.
- Identify and create opportunities for industry collaboration, to create a real-time and in-person sharing of resources.
- Work with associations and training institutions to strengthen professional skills.

Promotion and Marketing:

- Create and share best practices for tracking and maximizing audience data.
- Foster information sharing and collaboration between the live music industry and the tourism and hospitality industries across the province.
- Collaborate with other francophone live music markets, such as those in Quebec.
- Create a streamlined and focused strategy for marketing Ontario as a live music destination.
- Work with tourism agencies and organizations to create a more comprehensive and stronger listings database on the Ontario Live Music Portal.⁷⁷ *(note: the Ontario Live Music Portal has since been taken offline).*

Regulatory Factors and Government Coordination:

- Develop relationships and communication with provincial, federal and municipal governments across Ontario, particularly focusing on education and advocacy.
- Prioritize and address the most common regulatory issues facing the live music industry across the province.
- Coordinate communication between the music industry and other industry associations, such as the Canadian Federation of Musicians and music rights collectives.

Industry Infrastructure:

- Create an asset inventory on all the live music infrastructure, such as venues and stages, across the province.

⁷⁷ The Ontario Live Music Portal was a music listing website that included events both large and small across the entire province. It has since been taken offline.

- Work with municipalities, school boards and other community organizations to secure off-hours use of non-traditional spaces for DIY events.
- Promote music-friendly provincial and municipal policies that protect live music venues, to include rehearsal spaces.
- Look into developing all-ages live music events.

Impact Measurement:

- Promote ongoing research into the impact of the provincial live music industry.
- Utilize existing resources, including municipal governments, tourism bodies and music industry bodies to compile data.
- Partner with academic institutions and private consulting firms to collect data.

There has been no follow-up publication to communicate what actions have been taken thus far. The report had been published for approximately two years when the COVID-19 pandemic hit, causing the Ontario government to reassess its resource allocation.

The Impact of COVID-19 on Canadian Independent Music, 2020⁷⁸

In 2020, CIMA Music published research on the impact of the COVID-19 pandemic on the nation's independent music industry. Although lockdowns were still ongoing as of May 2021 and the full impact will not be realized for quite some time until after the world defines its 'new normal', it provides a snapshot of the industry as it stood some time after the global shutdown, benchmarking it against pre-pandemic trends. To collect this data, 24 interviews and three workshops were conducted across the nation, electing to forego data research due to the rapidly changing economic environment and survey fatigue across stakeholders.

Pre-COVID, streaming services were on the rise, with Spotify and Apple Music serving as industry leaders. In Canada, streaming services accounted for 69% of recorded music revenue, and domestic, independent labels accounted for 25%. However, the accessibility of streaming has led to a saturated market in which independent artists must directly compete to stand out against major brands and low subscription prices mean rights holders to the streamed music see a much lower return on investment than they do for physical sales. COVID-19 has only exacerbated this, eliminating the live performance opportunities through which emerging and independent artists build their act and grow their fanbase. Industry consultation shows underrepresented demographics such as women, BIPOC artists and professionals have felt this effect the most. Some artists have pivoted into online influencer

⁷⁸ Nordicity (2020a)

roles as a means of maximizing promotional opportunities and some have utilized the downtime to engage in skills growth or collaborative opportunities.

The national music industry can be economically divided into three subsectors: live music, sound recording and publishing. Live music directly employed 30,700 FTE jobs across the nation, while sound recording counted for 6,900 FTEs and publishing created 2,100 FTEs. Only 2% of music industry businesses had over 20 employees. The Canada Music Fund serves as the primary funding source, distributed via FACTOR and Musicaction. Ontario is the largest national pocket of the music industry, particularly in sound recording, while live performance concentrations were highest in both Ontario and Québec. Overall, it was estimated that, prior to COVID-19, the independent music publishing and sound recording industry was worth \$601 million in GDP (combining direct, indirect and induces) and generated \$171 million in taxes.

The report estimated a \$2.8 billion shortcoming of the music industry's five-year revenue growth trajectory due to COVID-19, with a 79% decline in live performance revenue from 2019, a 32% decline in sound recording/distribution revenue and a 44% decline in music publishing. Employment was estimated to fail its 2020 potential by 57%, or 41,900 FTE jobs, although federal wage subsidies have helped companies maintain more positions than their pandemic revenue would have supported on its own. Within the independent sector, it was estimated a \$233 million loss of revenue, or 41%, although this figure excludes live music activity. This marks an estimated \$241 million loss of GDP from 2019 figures, 1,650 fewer FTE jobs and \$55 million less in tax revenue from the independent music sector.

Looking towards the future, the report estimates it will take three years to recover from the COVID-19 pandemic and settle into a new normal. It projects total industry revenue between \$3.7 million and \$4.7 million by 2023, if the three years were to have begun in 2021. These figures are now unlikely due to the ongoing economic shutdown in Canada as of May 2021. In terms of job growth, a worst-case scenario estimates 35,600 direct FTE jobs by 2023 and a best-case scenario estimates 42,600. For the independent sector, revenue would have been expected to fall within the range of \$457 million and \$617 million by 2023, and employment was expected to be between 2,280 and 3,000 by that same year. These figures are less reliable due to the volatility of independent businesses, and the realization that any job losses are likely to be permanent and the independent sector is more likely to see business failures throughout the shutdown.

Moving forward, the report recommends extending the Canada Emergency Wage Subsidy throughout 2021, as only 5% of the music industry workforce is at the receiving end of the fund but relies on it fully to retain talent. To date, the application deadline has been extended until June 2021. Fiscal support is a vital lifeline for many businesses and professionals. In addition to the Emergency Wage Subsidy, music sector support from industry bodies such as FACTOR and Musicaction, both subsidized through the Canada Music Fund, have great impact potential; \$10 million of marketing and business activity investment could generate

\$50 million in GDP, 750 FTE jobs and \$15 million in tax revenue across the nation. Funding will need to be extended throughout the recovery period to support the industry as it gets back on its feet, and eligibility criteria should be reassessed on a quarterly or annual basis in order to best support the industry where needed. To date, neither FACTOR nor Musicaction's COVID-19 funds have been extended beyond August 2020.

2021 Live Music Industry Recovery Plan⁷⁹

In February 2021, the Canadian Live Music Association (CLMA) published its Live Music Industry Recovery Plan, outlining a series of recommendations toward the Canadian government to help them support the live music industry through the economic shutdown and guide them through their regrowth as the pandemic eases. The report brings attention to the 92% of lost revenue and depletion of cash reserves within the live music business, coupled with ongoing business costs such as rent or property taxes. It references a previous survey undertaken by the CLMA in partnership with the city of Toronto, wherein 96% industry stakeholders said they were at risk of business closure.⁸⁰ To help counteract this, CLMA calls for seven priority actions:

1. An additional \$25 million in emergency funding to specifically support live music entities on an as-needed basis rather than an assessment of previous funding received.
2. An expansion of the \$500 million Regional Relief and Recovery Fund (RRLF) Tourism Envelope to prioritize supporting those unable to access other support programs and to include owners of multiple businesses. The program must also be promoted to potential recipients better, as over half of the report's survey respondents were not aware of it.
3. Extend current emergency rent subsidy rates.
4. Increase the Canada Emergency Wage Subsidy to 85% until September 2021 for those businesses hit hardest, and make sure the program is sensitive to seasonal businesses that may not have reported revenue during certain periods due to the cyclical nature of their industry. Program criteria should also be changed to include 100% of the cost of furloughed employees. (*Note: Budget 2021 proposes extending the CEWS to September 2021 but gradually decreasing the subsidy rate in order to begin phasing out the programme. However, this has yet to be confirmed.*⁸¹)
5. Ensure the live music industry has access to rapid testing in order to restore audience confidence in the safety of gatherings. Direct government financial support to cover the costs of testing and contact tracing initiatives, or tax incentives to subsidize these costs, would make this more accessible for the live industry.

⁷⁹ Canadian Live Music Association (2021)

⁸⁰ Nordicity (2020b)

⁸¹ Government of Canada (2021a)

6. Support the UNISON Fund, the nation's primary industry charity which works to distribute funding quickly in order to help artists pay their most urgent bills and living expenses. Since the pandemic began in 2019, UNISON has seen a 3021% increase in inquiries, a 2047% increase in the amount of money distributed out to recipients, a 208% increase in crisis interventions and a 142% increase in counselling services that were provided.
7. In order to support long-term recovery and growth, the report calls for a multi-year \$50 million Canadian Live Music Support Fund. Money would go towards getting professionals back to work permanently, help venues with the cost of physical infrastructure for increased health and safety protocol, promote tourism and marketing partnerships to foster cross-sector growth and support behind-the-scenes professionals such as production and tech, who are often forgotten in live industry assessments, but are just as vital to operations.

CLMA recognizes that not all Canadians or even music industry professionals have experienced the same effects of the pandemic, and the future is still very much uncertain. However, live music is a key element of vibrant cities and adds great value to the workforce, economic growth, tourism and the creation of a city's brand. Because of this, it must be supported.

2.3 Operations and Zoning

2.3.1 Support for Music Industry

The City of Hamilton assists the music industry through its Creative & Cultural Industries sector, which includes a collection of staff who oversee a number of functions such as business development, programming, and industry engagement through their facilitation of the Hamilton Music Advisory Team (HMAT). HMAT provides advice and guidance to the city on music related issues. HMAT is composed of 13 people with backgrounds in radio, promotion, performance, advocacy, production, marketing and music industry administrative roles.

Music in Hamilton is a section of the city's website which includes a database of recording studios⁸² and events⁸³ in the city, as well as several resources for professional development such as funding support, general business support, healthcare (including mental health) resources, and online learning resources for audience development, business skills and more.

⁸⁴ The Music in Hamilton webpage features a logo, officially owned and trademarked by the

⁸² City of Hamilton (2021b)

⁸³ City of Hamilton (2021c)

⁸⁴ City of Hamilton (2021d)

city, illustrating its embrace of music as a cultural and historical asset. There are city-managed social media accounts which promote and support the local music scene as well.

In addition to Hamilton-specific leadership, in 2012, the Canadian Music Industry Association (CIMA) launched MusicOntario, a member-based non-profit that advocates for supportive government policy; education and professional development opportunities; and community engagement for the provincial music industry. MusicOntario is open to all music industry stakeholders from creatives to professionals, business-owners and educators.⁸⁵

2.3.2 Entertainment District

Most of Hamilton's entertainment is clustered in the core downtown area. In 2020, Hamilton City Council announced that it would move forward with an entertainment district development plan. Contracted to the Hamilton Urban Precinct Entertainment Group L.P. (also known as the Precinct Group), the development will feature a renovated convention center and concert hall, an arena, renovations and expansions to the Art Gallery of Hamilton, and increased spaces to create \$340.5 million worth of residential, office and retail units. Renovations are expected to begin in fall 2021, although no completion date has been announced.⁸⁶

2.3.3 Agent of Change

Agent of Change is an ordinance which places the responsibility of noise attenuation in the hands of the newest developer, thus protecting existing buildings, such as music venues, from noise complaints. Though not called Agent of Change, Hamilton has a policy in place which protects music venues from residential noise complaints. Appendix A to the 2018 Downtown Hamilton Secondary Plan Summary Report requires "new residential developments to employ appropriate noise attenuation measures when the development is proposed in an area where a live music venue exists."⁸⁷ The report recognizes live music venues as a core factor in maintaining Hamilton's night time economy and preventative policies as a way of maintaining their important cultural output.

2.3.4 Transport and Parking

Hamilton is serviced by Hamilton Street Railway, which operates extensive bus routes that connect the downtown and outlying neighbourhoods, although the last service of each night usually leaves around 1am (with less busy services ending around 10pm).⁸⁸ GO Transit

⁸⁵ MusicOntario (2021)

⁸⁶ City of Hamilton (2020a)

⁸⁷ City of Hamilton (2018)

⁸⁸ City of Hamilton (2021e)

connects Hamilton to Greater Toronto via train and bus services, with services ending around midnight.⁸⁹

In 2015, the city announced that it had received provincial funding for a 14-km Light Rail Transit route running from McMaster University to Eastgate. A request for proposals was issued in 2018, and early construction was due to be carried out in 2019-2021.⁹⁰ However, in December 2019, the Ontario Government announced the cancelation of its procurement, promising to work with Hamilton to find alternative means of delivering the CAD\$1 billion funding pool.⁹¹ As of June 2021, the city was working with the federal government, the provincial governments of Ontario and Ottawa and Metrolinx to submit an agreement worth CAD\$3.4 billion to complete the project.⁹²

In 2017, musician welcome signs were introduced to facilitate musician loading/unloading spots near venues. The first venues to receive the signage were The Casbah, Mills Hardware, This Ain't Hollywood and First Ontario Centre.⁹³ The scheme is still considered to be in its pilot stage, and therefore, at the date of this report, no additional signs have been incorporated.

2.4 Licensing and Regulations

2.4.1 Liquor Licensing

Liquor licenses are issued through the Alcohol and Gaming Commission of Ontario, and applicants must complete both the Liquor License form and the Municipal information form.⁹⁴ The cost is approximately \$900.75 and applicants must submit a site plan and operational strategy alongside. The forms are submitted to the Hamilton Licensing Office, which then submits them to all relevant authorities including fire, police and public health departments.⁹⁵

Certain designated properties are exempt from these requirements so long as the events occurring on said properties have a Special Occasion Permit (SOP) or Caterer's Endorsement.⁹⁶ A full list of these properties can be found in Appendix B of the Municipal Alcohol Policy.⁹⁷

⁸⁹ GO Transit (2021)

⁹⁰ City of Hamilton (2021)

⁹¹ Infrastructure Ontario (2019)

⁹² Rankin (2021)

⁹³ City of Hamilton (2017)

⁹⁴ City of Hamilton (2021f)

⁹⁵ City of Hamilton (2021g)

⁹⁶ City of Hamilton (2011a)

⁹⁷ Priel (2010a)

For events wishing to sell alcohol, the city advises planning six months before the desired event date. Organizers must obtain \$5 million in special event liability insurance; complete the city's in-house event application form as well as the Alcohol and Gaming Commission of Ontario's Special Occasion Permit; and draft strategies to meet the municipal alcohol policy for events, including:

- A transportation strategy
- Meeting the worker-to-guest ratio, with all alcohol servers having undergone Smart Serve training
- Serve food
- Serve drinks in paper or plastic cups
- Provide a selection of non-alcoholic drinks
- Follow serving rules regarding sizes of drinks, amount sold per person at a time and hours of serving as related to hours of the event.

According to the Vision for Ontario's Live Music Industry, alcohol regulations are unevenly enforced and lack transparency, making it difficult for venues to navigate the territory and uphold the rules. Although details were not specified, the report claims inconsistencies can be found between regions and from genre to genre.⁹⁸

2.4.2 Events

Hamilton defines community events as those open to the public with less than 1,000 attendees. They may serve food and non-alcoholic beverages and allow sound amplification and small tents.⁹⁹ Organizers are required to obtain at least \$2 million in third party event insurance. The city can provide basic event insurance at an adjustable fee depending on the number of attendees, but it cannot cover higher-liability elements such as bouncy castles, fireworks, etc.¹⁰⁰

Major events are defined as those expecting crowds of 1,000 or more, requiring road closures and including tents or temporary structures large enough to require permits, fireworks or other open flames, alcoholic beverages and amusement rides. Event organizers are required to obtain at least \$5 million in third party event insurance.¹⁰¹ The city maintains a list of rentable city parks, arenas, sports fields and recreational facilities (primarily community and recreational centres) within a dropdown menu on the event application portal,¹⁰² as well as an interactive map of parks throughout the city on their event permitting website.¹⁰³ Rental fees are estimated by request.

⁹⁸ Ontario Government (2020)

⁹⁹ City of Hamilton (2021h)

¹⁰⁰ City of Hamilton (2021i)

¹⁰¹ City of Hamilton (2021i)

¹⁰² City of Hamilton (2021j)

¹⁰³ City of Hamilton (2021k)

Outdoor amplified sound is permitted between 11am-midnight, so long as the noise is still compliant with municipal noise control by-laws. This means noise may not exceed 90 dBA at 10m from the source or 60 dBA at the point of reception, and noise is not permitted after midnight. If the event is being held on private property, it must have a noise exemption permit to have amplified sound outdoors.¹⁰⁴

Building permits are required for temporary structures including stages and support structures, if they meet certain conditions. Stages with a surface area over 225 sqm., parts of a stage (roof, floor or wall) more than 5m above the ground, and stages that are *both* 3m above the ground and more than 60 sqm. in area require a permit. Support structures weighing more than 115 kg. and those over 3m above their base support structure also need a building permit. Tents will also need a building permit if they have a ground surface area of 60 sqm.; are attached to a building; or built within 3 m of another structure.¹⁰⁵

If needing power, event organizers must provide all their own connecting and safety equipment, such as extension cords and mats. For power over 10KW, organizers must obtain a permit from the Electrical Safety Authority. These take two days to process, and their price is dependent on the details of the event and needs of the organizer.¹⁰⁶

Fair Pay

In July 2021, the city finalized the details of a new policy which requires city-hosted and city-led events to pay musicians a fair wage, in accordance with the wage standards set out by the Canadian Federation of Musicians.¹⁰⁷ City-led events are defined as “those that are led and organized by City staff; events directed by Council or under the guidance of boards or committees; and/or when the city contracts a third party to oversee an event.”¹⁰⁸

COVID-19: Events

All event applications must have a COVID-19 Response Plan in accordance with the template provided on the city’s website.¹⁰⁹ The city has published a post-pandemic reopening guide for events held on public property, alongside an appendix listing provincial, national and global reopening guidelines from trusted organizations. Some key points include:

- Submit a COVID-19 response plan alongside the primary event application supporting documentation (required)

¹⁰⁴ City of Hamilton (2021l)

¹⁰⁵ City of Hamilton Building Division Policy (2021)

¹⁰⁶ City of Hamilton (2021l)

¹⁰⁷ Rankin (2021)

¹⁰⁸ City of Hamilton (2021d)

¹⁰⁹ City of Hamilton (2021h)

- Keep a record of all guests and staff to help the Public Health Department trace any positive COVID-19 results (required)
- Separate gates for entering and exiting
- Encourage mask use both indoors and outdoors
- More frequent cleaning of common touchpoints, both for guests and performers
- Limited restroom occupancy
- Regularly promote safe practices such as social distancing and personal hygiene via audio and visual broadcasting¹¹⁰

In May 2021, Ontario released a three-stage reopening plan that would coincide with vaccination rates. The following table is a simplified version of the stages, as it would pertain to music activities and events:

- Stage 1 (60% have first dose)
 - Outdoor gatherings up to 10 people
 - Outdoor dining up to four people
- Stage 2 (70% have one dose, 20% are fully vaccinated)
 - Outdoor gatherings up to 25 people
 - Outdoor dining up to six people
 - Outdoor meeting/event spaces with capacity limits (unspecified)
 - Outdoor performing arts facilities with capacity limits (unspecified)
 - Indoor performing arts facilities closed to public but permitted for rehearsals or recorded/broadcasted performances
 - Fairs and rural exhibitions with capacity limits (unspecified)
- Stage 3 (70-80% have first dose, 25% are fully vaccinated)
 - Both indoor and outdoor gatherings with larger capacity limits (unspecified)
 - Indoor meeting and event spaces with capacity limits
 - Indoor performing arts facilities with capacity limits
 - Other outdoor activities from stage 2 permitted to operate indoors¹¹¹

2.4.3 Noise

Hamilton does not have zone-based dBA limits. Certain activities are exempt from noise permit requirements (or the specifications are included within the terms of other permitting). These include events at Tim Horton's Field, activities with a film permit and events which have already been issued a Special Event permit (so long as the noise occurs between 11am and midnight; does not exceed 90 dBA 10m from its source; and does not exceed 60 dBA at the point of reception). Fines for non-compliant individuals are capped at \$10,000 for the first

¹¹⁰ City of Hamilton (2020b)

¹¹¹ Government of Ontario (2021a)

offence and \$25,000 for subsequent offences, while those for non-compliant corporations are capped at \$50,000 and \$100,000, respectively.¹¹²

Noise exemption permits are available for events and outdoor commercial patios priced at \$185 if paid with at least 60 days until the event; \$279 if paid with less than 60 days until the event; and \$525 for outdoor commercial patios.¹¹³ Noise exemption permits allow amplified noise between 11am and 12am midnight. Noise is not permitted after midnight.¹¹⁴

2.4.4 Busking

In 2010, a recommendation was submitted to the city by its Emergency & Community Services committee, calling for a strategy to be introduced. The recommendation called back to the Organized Street Buskers Program, which had been put in place as part of the Positively Downtown initiative, but was no longer active.¹¹⁵ A follow-up submission outlined recommended guidelines and best practices for the proposed strategy.¹¹⁶ Though Hamilton passed this busking policy, it requires additional promotion and educational outreach as the affected population is not necessarily aware of its terms or conditions.¹¹⁷

2.4.5 Environmental Sustainability & Recycling

Hamilton follows the Corporate Energy Policy, a city-established standard last updated in 2014, to work towards its goals of a 45% energy reduction by 2030 and an 80% energy reduction by 2050, including greenhouse gas emissions. In 2019, the City Council declared a climate emergency, which further focused efforts to reduce greenhouse emission. Actions are spread across various city departments. The Waste Management group oversees public education while recycling and composting 138,000 metric tons of landfill-bound waste. The Transportation and Public Health groups promote sustainable transportation for all ages, to include bike lanes. Hamilton Renewable Power Inc, which is city-owned, also maintains renewing assets that generate approximately \$1.2 million for the city on an annual basis.¹¹⁸

The City of Hamilton is a member of the Sustainable Business Initiative, a local collective of businesses and municipal governments originally stemming from Hamilton itself. The SBI seeks to reduce greenhouse gas emissions and create a more sustainable environment. Participants attend annual educational events and maintain a milestone-driven strategy to achieve targets. Since its inception in 2016, the collective has worked with 45 businesses and government members to establish their sustainability targets, and participation grew 69% between 2018 and 2019. To date, members have reduced over 20,000 tonnes of carbon

¹¹² City of Hamilton (2011b)

¹¹³ City of Hamilton (2021m)

¹¹⁴ City of Hamilton (2021l)

¹¹⁵ Priel (2010b)

¹¹⁶ Priel (2011)

¹¹⁷ City of Hamilton (2021d)

¹¹⁸ City of Hamilton (2021n)

dioxide equivalents, over half of which occurred in 2019 alone. Other members of the Sustainable Business Initiative include Hamilton International Airport and Mohawk College.¹¹⁹

Hamilton residents have two blue recycling bins in addition to their standard waste bin. All containers (bottles, cans and jars) go into one bin, and all paper and cardboard go into another. The city maintains a list of recyclables and their categories online. Those who sort their garbage and recycling according to city standards and put out less than one bag of normal garbage every week can obtain a gold recycling bin as an award for their efforts. Residents must register their address online to be considered for the random audits that allow them to win a bin. Both recycling and normal trash are collected once a week. Green bins are also available for compost waste.¹²⁰

All events must have a plan in place for waste management, collection and disposal, and event locations must be left clean after the event. Any non-profit programming lasting at least two days and expecting daily crowds of 1,000 or more may qualify for City-led waste collection, but for-profit events have to hire private contractors for waste management.¹²¹

There are no venues in Hamilton actively promoting sustainability as part of their business model. Of the local music festivals, only Supercrawl references sustainability on their website, saying they “will share local products and minimize [their] environmental footprint”. They do not elaborate on how they go about achieving this, but they have received three Community in Motion Awards for ‘Pedestrian-Friendly Organization of the Year’ (2014), ‘Transit-Friendly Organization of the Year’ (2016) and ‘Bike-Friendly Organization of the Year’ (2017).¹²²

2.5 Music Education

The Creative Industries Sector Profile showed that, in 2016, about 1,975 people (less than 1% of the total population) in Hamilton held a postsecondary qualification in a music-related field. 54% of these graduates were male, and most of the total graduates were between 25-44. It’s worth noting that, at the time, there were no graduates in Arts, Entertainment and Media Management under 24, showing a potential future gap in supportive professionals further down the line.¹²³

2.5.1 K-12 Programs

Hamilton's public schools are serviced by the Hamilton-Wentworth District School Board. The district recognizes the value of arts education in creative, social and intellectual growth and strives to create equal access for all students in elementary and secondary schools. The

¹¹⁹ Sustainability Leadership (2019)

¹²⁰ City of Hamilton (2021o)

¹²¹ City of Hamilton (2021l)

¹²² Supercrawl (2021)

¹²³ Invest in Hamilton (2016)

provincial arts curriculum determines core elements of arts and music education, beginning with foundational exploring in grades K-8. During secondary school, students begin to focus more on mastering technical skills, analyzing the impact music has on society and understanding career opportunities within the industry.¹²⁴

The district's strings program is divided into two groups: Elementary (grades 4-8) and Secondary (grades 9-12). The cost of the program gives students use of their chosen instrument (violin or cello), a music book to keep, 30 half-hour lessons (group or private) and two concerts with dress rehearsals. Students may also join the orchestra for an additional fee.¹²⁵ The secondary strings program is located at Glendale Secondary School, although students from any district secondary school may participate (transport is provided).¹²⁶

Glendale Secondary School offers audition-based arts programming in various disciplines, including band, contemporary music, strings or vocal focuses. Students have training based on their chosen discipline in addition to experiential learning opportunities like collaborations with studio and stage productions, career guidance and exploration and professional certification upon graduation, to include headshots and a portfolio. The arts program is completed by standard curriculum classes to fulfill general education requirements for a graduating diploma.¹²⁷

Finally, the Specialist High Skills Major program allows students to choose an area of educational focus in grades 11 and 12. Areas of focus include Arts Management and Music, and programs are offered at several secondary schools in the district, such as Dundas Valley, Glendale, Orchard Park, Sherwood, Sir Allen McNab, Westdale and Westmount. Participants enroll in four discipline-focused courses as well as two required courses (English & Business or Canadian & World Studies) and two co-op credits in art placement (similar to an internship or apprenticeship). Program electives cover a range of topics, including event coordination, musical instrument repair, proposal/grant writing, recording equipment and lighting and sound equipment maintenance. Students also receive experiential learning by attending events and shows around the city, from workshops to concerts, and receive opportunities for work experience through shadowing programs.¹²⁸

In addition to municipal curriculum, there are educational opportunities initiated at the provincial level or from the private and non-profit sectors. One such program is MusiCounts, an education charity associated with the JUNO Awards that works to ensure the country's youth has access to music education resources and instruments. Their activity is focused through six programs:

¹²⁴ Ontario Government (2012)

¹²⁵ Community and Continuing Education (2021)

¹²⁶ Glendale Secondary School (2021)

¹²⁷ HWDSB (2021a)

¹²⁸ HWDSB (2021b)

- The **Band Aid** program provides grants worth between CAD\$5,000-15,000 for public, separate and First Nations schools in Canada. The fund can go towards creating a music education program at their school or expanding an existing one, with eligible expenditures defined as ‘any approach to music education...[or] any kind of musical instruments.’ Early bird applicants may be entered to win additional prizes, such as instruments. Grantees are chosen based on the socio-economic need of their school, the inventory and condition of their current instruments, the number of students, the dedication of their staff and the overall perceived impact of the grant. To date, 1,120 schools have been awarded CAD\$10.625 million in grants.¹²⁹
- The **TD Community Music** program provides up to CAD\$25,000 to community centres, after-school programs or other community non-profit entities to use towards musical instruments and equipment. It operates in a similar way to the Band Aid program, including eligibility, in order to provide a similar opportunity to those organizations not part of the Provincial Departments of Education. To date, 214 community organizations with 22,000 program participants have received CAD\$3.2 million.¹³⁰
- The **Teacher of the Year** award, in association with the Canadian Scholarship Trust Foundation, is given to an outstanding music teacher. While teachers are often nominated by their colleagues, in order to be eligible, they must have applied for Band Aid funding. The Teacher of the Year is given a CAD\$10,000 cash prize, a significant contribution to their school’s music program, recognition at the JUNO Awards and a statuette. Fifteen Teacher of the Year awards have been issued to date.¹³¹
- The **Accelerate Scholarship**, a partnership between MusiCounts and the RBC Foundation, grants four to six students who are pursuing post secondary music education a \$CAD4,000 cash prize alongside mentorship and networking opportunities. The mentorship program is held in Toronto over the course of one week and includes informative sessions with local industry professionals and business owners, practical workshops to develop business skills (areas include social media, publicity and financial literacy), collaborations with other scholarship winners and industry mixers. Students must be nominated by their school. Graduate and postgraduate students are not eligible.¹³²
- The Inspired Minds Ambassador Award is presented by the Canadian Scholarship Trust Foundation and highlights an individual that has made a significant contribution to music education and the MusiCares charity. The recipient is given a statuette based on the JUNO award, and CAD\$30,000 is given to the Band Aid program in their name. Previous winners include charity founders and those who have made significant financial contributions to MusiCounts or other music education charities.¹³³
- MusiCounts Learn provides learning resources for both students and teachers (across music or social studies) in grades 7-12. The curriculum highlights different aspects of the music industry or music history, with text content, video content and activities to

¹²⁹ MusiCounts (2021a)

¹³⁰ MusiCounts (2021b)

¹³¹ MusiCounts (2021c)

¹³² MusiCounts (2021d)

¹³³ MusiCounts (2021e)

engage students. The 2021 topic is “Kanata: Contemporary Indigenous Artists and their Music”. As a capstone project, students are asked to complete an artist profile on an Indigenous artist from their region. This will enter them into a chance to win one of ten CAD\$1,000 scholarships for their school. MusiCounts plans to expand the coursework to include French-language materials, events and professional development activities.¹³⁴

2.5.2 Tertiary Programs

There are three tertiary programs for music in Hamilton. Redeemer University offers a Bachelor of Arts in Music, as well as music as a minor, but none of the curriculum's classes cover music business fundamentals.¹³⁵ McMaster University's Music program offers specializations in music cognition, music education, music history and music theory. There are currently no internships offered through the program, but performance ensembles are available on an audition basis.¹³⁶ Finally, Mohawk College offers a variety of certificates and advanced diplomas in applied music, all of which are focused on various instrumental and orchestration specialties.¹³⁷

2.5.3 Independent and After School Programs

Outside of formal education, there are several extra-curricular instrumental and orchestral programs at institutes such as the Hamilton School of Music, Hamilton Conservatory for the Arts and Hamilton Suzuki School of Music.

A list of professional development resources can be found on the Music in Hamilton webpage, to include online, provincial and national resources for business skills building (including digitizing business skills during the COVID-19 transition to virtual business).¹³⁸ One of the more curated listings is the Creative Exchange, a free quarterly meet-up for all creative professionals to help facilitate cross-industry networking and introduce various creative spaces around the city.¹³⁹ The annual Musician Entrepreneur Conference is free to attend and is targeted at independent musicians. Panel topics at the 2020 edition, which was held virtually, included album release planning, grants, home and studio recording, small-budget marketing and post-release promotion.¹⁴⁰

¹³⁴ MusiCounts (2021f)

¹³⁵ Redeemer University (2021)

¹³⁶ McMaster University (2021)

¹³⁷ Mohawk College (2021)

¹³⁸ City of Hamilton (2021d)

¹³⁹ Invest in Hamilton (2020b)

¹⁴⁰ City of Hamilton (2020c)

2.6 Funding Support

2.6.1 Municipal Funding

The only municipal fund accessible to the industry is the City Enrichment Fund, which offers monetary support across six areas: Agriculture, Arts, Communities, Culture & Heritage, Community Services, Environment and Sports & Active Lifestyles.¹⁴¹ Festivals, events and cultural organizations can apply through one of four pathways:

- Capacity Building - grants local organizations 30% of their project budget (up to \$25,000) for board and organizational development, including strategic plan creation, mentorship and workshops.¹⁴²
- Art Creation and Presentation - grants local artists aged 18+ and residing in Hamilton for at least 12 months 30% of their project expenses (up to \$10,000), including studio fees, equipment rental and promotional materials.¹⁴³
- Arts Festivals - grants Hamilton nonprofits that have been incorporated for 5+ years 30% of festival expenses (up to \$100,000) and nonprofits incorporated for less than five years 30% of expenses (up to \$10,000) for festivals or events occurring in the city. Eligible expenses include artist fees, production costs, insurance, promotion and city fees.¹⁴⁴
- Arts Operating - grants local organizations incorporated for 5+ years up to 30% of all ongoing artistic and administrative operating expenses (no cap).¹⁴⁵

2.6.2 Provincial Funding

Ontario Creates oversees the execution of the Ontario Music Investment Fund, a \$7 million fund granted by the government in May 2020.¹⁴⁶ This fund utilizes investment to promote long-term growth and job creation; maximize return on investment; enhance opportunities for emerging talent; increase the production of intellectual property; provide support for artists and businesses at various stages of their careers; and promote Ontario as a world-class source of artists. Only Ontario-based companies and artists may apply. There are three streams through which funding is distributed:

1. Music Creation - for domestic and multinational record labels, as well as domestic music publishers

¹⁴¹ City of Hamilton (2021p)

¹⁴² City of Hamilton (2021q)

¹⁴³ City of Hamilton (2021r)

¹⁴⁴ City of Hamilton (2021s)

¹⁴⁵ City of Hamilton (2021t)

¹⁴⁶ Government of Ontario (2021b)

2. Music Industry Initiatives - for music industry trade associations and organizations, as well as managers in need of export/market development funding
3. Live Music - for Ontario-based promoters and presenters creating live music events which feature Canadian artists from any province

Due to COVID-19, eligible activity shifted in order to cover costs such as salaries, virtual events or networking fees and marketing materials. No plans have been published to replenish the fund since it was first announced.¹⁴⁷

The Ontario Arts Council funds music via five pathways:

- The Music Creation Projects pathway supports provincial artists creating original work, regardless of career stage. The grant has two sub-categories: self-directed creation (worth up to CAD\$4,000) or commissioning (worth up to CAD\$20,000). The Council is looking to award projects that show exceptional creativity, enhance the range of music available to both artists and audience members and contribute to arts education or community engagement. Eligible expenses include artist fees, sheet music copy costs, space and equipment rental or purchase, child care and dependent care.¹⁴⁸
- The Music Organizations Operating grants work to support operational costs and activities for not-for-profits, opera companies, orchestras, choral organizations, festivals and contemporary music organizations. Eligible organizations must have at least CAD\$75,000 in revenue in the last fiscal year (for opera companies this is CAD\$100,000 and for orchestras this is CAD\$200,000), at least two years of regular programming and an active board of directors or governing body. Further stipulations are in place depending on the nature of the applying organization, but generally focus on progressing Canadian music and musicians and maintaining an artistic standard for their musicians or musical output. Although no maximum grant limit is published, the Council does specify that any applications for grants over CAD\$50,000 must submit audited financial statements. Applications are assessed on a weighted scale which looks at the organizations' artistic or service quality (25%), contribution to their artistic field or community (30%), contribution to Ontario Arts Council's priority groups¹⁴⁹ (25%) and administrative and financial viability (20%).¹⁵⁰
- The Music Production and Presentation Projects grant supports live and virtual music presented as a single performance, a concert series, a music festival, an opera production, a second-stage opera workshop or a rehearsal. The grant looks to support those projects that pay artists a fair fee; utilize provincial or national composers and songwriters; promote education or community engagement; and present original work. The grant amounts vary depending on the applicant; individual musicians or programmers can apply for a maximum of CAD\$20,000, professional groups or

¹⁴⁷ Ontario Creates (2021c)

¹⁴⁸ Ontario Arts Council (2021a)

¹⁴⁹ Priority groups include artists of colour, deaf artists and artists with disabilities, francophone artists, Indigenous artists, New Generation artists (18-30 years old) and artists living outside Toronto.

¹⁵⁰ Ontario Arts Council (2021b)

organizations can apply for up to CAD\$20,000, semi-professional training organizations can apply for up to CAD\$5,000, other semi-professional and community orchestras can apply for up to CAD\$15,000 and Northern semi-professional and community orchestras can apply for up to CAD\$20,000.¹⁵¹ Eligible project costs include artist fees, production costs, venue and equipment rental, basic equipment or software (up to CAD\$500), marketing and promotion, recording costs, child care or dependent care and any expenses brought on by making the project available to those with disabilities.¹⁵²

- The Music Recording Projects grant works to support provincial artists either creating a demo/EP or a full-length album. Projects must be ready or almost ready to be recorded at the time of application. Demo/EP recordings must be no longer than 25 minutes and qualify for up to CAD\$4,000 in funding, while full-length albums can receive up to CAD\$10,000. Grants may be put towards the costs of recording, mixing, mastering, artist or producer fees, studio or venue rental, recording equipment, packaging artwork, marketing or promotional costs, manufacturing of up to 1,000 units and child care or dependent care.¹⁵³
- The Musique - projets francophones program is only available for French-language projects and works to fund new creations (up to CAD\$5,000), a demo or EP (up to CAD\$5,000), a full-length album (up to CAD\$10,000), the development of a show (up to CAD\$8,000), or music video production (up to CAD\$8,000). In order to be eligible, at least 50% of the content must be in French, and no more than 30% may be in English. Eligible expenditures include production costs, artist fees, promotional costs and child care or dependent care.¹⁵⁴

All those who receive a grant via the Ontario Arts Council must submit a final report outlining their project's budget, a sample of work from the project or links to its website and proof of acknowledgement within the project of the grant support.

2.6.3 National Funding

Starting in the 2021-2022 fiscal year, the federal budget will allocate CAD\$70 million over three years to go towards Canadian Heritage for the Canada Music Fund, including CAD\$50 million towards the live music sector (this is in addition to the CAD\$200 million for major festivals and CAD\$200 million for community festivals and events).¹⁵⁵ The Canada Music Fund is administered by the Government of Canada through two bodies: FACTOR for English-language works and Musicaction for French-language works. Due to Hamilton's minimal French-speaking population (1.7% claim French as their mother tongue¹⁵⁶), this section

¹⁵¹ Northern orchestras are those located in the Far North, Northwest and Northeast areas of Ontario.

¹⁵² Ontario Arts Council (2021)

¹⁵³ Ontario Arts Council (2021)

¹⁵⁴ Ontario Arts Council (2021e)

¹⁵⁵ Canadian Association for Performing Arts (2021)

¹⁵⁶ Statistics Canada (2017d)

will focus on FACTOR, among other English-language or relevant minority-focused programmes.

FACTOR (The Foundation Assisting Canadian Talent On Recordings) oversees the distribution of federal funds from the Department of Canadian Heritage and the country's private radios. In order to access funding, artists must create a profile within the FACTOR portal. Profiles are given ratings from General Artist to Artist 3 based on career milestones, such as album sales, social media followers or tour revenue. Higher ratings unlock different grant programmes or higher levels of funding approval within certain grants.¹⁵⁷ There are 13 funding programmes currently operating:

- Artist Development - geared towards emerging artists, this fund grants a CAD\$2,000 subsidy for activities such as recording, touring, showcases, video content production and marketing. In order to qualify as 'emerging', the artist cannot have commercially released anything more than three years prior to applying. Applications are narrowed down by a board of music industry professionals before being sent to FACTOR staff to select recipients. Upon being approved, 75% of the total grant is released; the other 25% is given to the artist after they have completed the items set forth in their development plan, which they would have submitted alongside their application.¹⁵⁸
- Collective Initiatives - provides funding for initiatives which benefit multiple artists. This fund is divided into three categories: Industry events (such as award shows, conferences, market development research), Showcases for Minority Communities, and Showcases for Export-ready Artists. Grants are issued for 75% of the total eligible budget up to CAD\$200,000 per fiscal year for industry events, 75% of the total eligible budget up to CAD\$100,000 for minority community showcases and 75% of the total eligible budget for export-ready showcases. Generally, 50% of the awarded amount is issued initially, with the other 50% issued upon project completion.¹⁵⁹
- Comprehensive Artist - helps artists or their labels with the cost of acquiring, producing and marketing a full-length album. Artists are ineligible if they have received a platinum record, sold over 100,000 copies of a single album worldwide, or sold over 200,000 albums in their career. FACTOR will grant 75% of the total project cost up to \$82,500.¹⁶⁰
- Comprehensive Music Company - similar to the Comprehensive Artist fund, this is geared towards record labels themselves.¹⁶¹
- Envelope Funding for Music Companies - helps companies develop and promote artists by covering the costs of producing and marketing records, conducting national or international tours, securing artist management or undertaking business development activities. FACTOR will grant 50% of total eligible expenses, with funding

¹⁵⁷ FACTOR (2021a)

¹⁵⁸ FACTOR (2021b)

¹⁵⁹ FACTOR (2021c)

¹⁶⁰ FACTOR (2021d)

¹⁶¹ FACTOR (2021e)

for individual companies capped at CAD\$650,000 and funding for affiliated companies capped at \$800,000.¹⁶²

- Funding for National Service Organizations - works to ensure NSOs can maintain operations which support longevity across the Canadian music industry. This stream is open to not-for-profits with an annual budget of at least CAD\$300,000 and at least two years of operational history serving Canadian artists. The grant will fund 75% of eligible expenses up to CAD\$650,000 per fiscal year. Applicants must submit a business plan which lays out their objectives and provides measurable results.¹⁶³
- Juried Sound Recording - funds the cost of producing or acquiring an original full-length sound recording, as well as the costs of marketing or promoting said recording. Because of the competitive nature of this particular fund, applicants must be able to demonstrate market momentum through quantifiable metrics covering areas such as audience development, sales, streams, etc. Successful applicants will receive 75% of their total eligible budget up to CAD\$77,500, paid in two increments (the first half at approval and the second half at project completion).¹⁶⁴
- Live Performance - provides funding for the costs of both domestic or international performances through either the Tour Support or the Showcase pathway. Qualifying applicants must have released their work no more than 24 months prior to applying or have a release scheduled within six months of applying. Successful Showcase applicants can receive up to CAD\$5,000 for domestic showcases or CAD\$7,500 for international showcases. Tour support grants are offered up to CAD\$35,000, of which CAD\$15,000 can be used for domestic tours, or the entirety for international tours.
- Marketing and Promotion for Non-FACTOR-Funded Sound Recordings - provides marketing funding for commercially-released recordings that did not receive FACTOR funding during the creation process. Recordings must have sold a certain amount of copies or achieved a certain chart position in order to qualify. Successful applicants will receive 75% of their total budget up to a maximum CAD\$20,000 budget, as well as an additional CAD\$5,000 for radio marketing.¹⁶⁵
- Songwriter Development - provides a CAD\$2,000 grant to be used for a year's worth of songwriting initiatives and activities, such as workshops, retreats or showcases. Applicants must be registered with a performance rights organization (PRO), have three commercial releases in the 12 months preceding their application and have 10 songs written or co-written in the 12 months preceding their application.¹⁶⁶
- Sponsorship - provides smaller grants for music-related projects that don't fit into any of the other programme streams. Past recipients have included new and genre-specific music festivals, conferences, workshops and international showcases. Extra consideration is given to those projects that help underserved communities such as remote or rural communities, Indigenous peoples, Black artists or Artists of Colour, and LGBTQ2S artists. Companies can receive up to CAD\$30,000 for their projects.¹⁶⁷

¹⁶² FACTOR (2021f)

¹⁶³ FACTOR (2021g)

¹⁶⁴ FACTOR (2021h)

¹⁶⁵ FACTOR (2021i)

¹⁶⁶ FACTOR (2021j)

¹⁶⁷ FACTOR (2021k)

- Support for Eligible Music Companies - funds business development initiatives such as marketing and domestic or international travel, or (for music publishers) songwriting initiatives. Applicants must submit a business development plan. Successful company applicants can receive up to CAD\$20,000 across both the business development or travel components, while music publishers can receive an additional CAD\$20,000 for the songwriting component.¹⁶⁸
- Video - provides funding for the cost of producing music videos to accompany Canadian recordings. CAD\$40,000 is available per qualifying release per fiscal year, but this is shared with video support components of any other funding programs. 50% of the award is issued upon approval, with the remaining 50% given upon project completion.¹⁶⁹

The SOCAN Foundation operates both individual grant programs and organizational grant programs. Applicants are narrowed down by Foundation staff, transferred to a special committee for an additional review before finalists are recommended to the Board of Directors for final approval. Current funding programs include:

- Travel Assistance Program - helps with travel-related costs for career development activities in Canada or internationally. Applicants may receive compensation to cover expenses such as award presentation, important performances, residencies, showcases and workshops. Self-directed and paid activities are not eligible for funding. Grants are awarded according to the distance of said activity, beginning at CAD\$400 for travel between 201 and 1,000 km one way and maxing out at CAD\$1,000 for travel over 5,000 km one way.¹⁷⁰
- Professional Development Assistance Program - provides funds to be used towards registration or incidental fees for conferences, courses, seminars and workshops. In order to qualify, applicants must have received two SOCAN royalty payments in each of the preceding three years, while music publishers must represent at least four SOCAN members and must have received two SOCAN payments in each of the preceding three years. The maximum grant is CAD \$1,500.¹⁷¹
- Work Commissioning Assistance Grant - aims to fill the gaps of government arts council funding by helping individuals, corporations, performers, ensembles and presenters commission SOCAN members to create musical works. Each grant, issued for an amount between CAD\$1,000-\$3,000, must be matched by the recipient's privately raised funds. The commission writer must retain copyright of the work.¹⁷²
- Canadian Music Assistance - supports project costs for music presentation events (such as showcases, concerts and festivals featuring at least 50% Canadian music), educational activities (such as workshops or the incorporation of Canadian music into

¹⁶⁸ FACTOR (2021l)

¹⁶⁹ FACTOR (2021m)

¹⁷⁰ SOCAN Foundation (2021a)

¹⁷¹ SOCAN Foundation (2021a)

¹⁷² SOCAN Foundation (2021a)

schools), or publication activities (such as research or writing for books, journals or performance scores). The average grant is CAD\$1,500.¹⁷³

- Annual Operations Assistance - annual grants for not-for-profit member service organizations that represent Canadian musicians and music publishers. Grants are to be used towards operating activities. The grant amount is not published.¹⁷⁴

The Canada Cultural Spaces Fund provides funding for renovation and construction, including equipment costs and feasibility studies, for cultural spaces. The national government announced a CAD\$300 million fund to be dispersed between 2018 and 2028 as part of its greater Investing in Canada Plan. Eligible organizations include not-for-profit arts or heritage organizations operating in a professional capacity, not-for-profit organizations that are developing or managing a creative hub, and provincial/territorial/municipal governments (including Indigenous organizations) that have proven support of artistic and heritage activities. Eligible expenses include professional fees, construction costs, safety and security system installation, construction for environmental sustainability and specialized equipment costs (specialized equipment defined as sound or lighting, removable seating, stage and rigging equipment, integrated data collection or ticketing systems, exhibition cases, interactive displays, etc.). The maximum funding depends on what the applicant needs the grant for. For individual construction or renovation applications, successful applicants may receive less than CAD\$15 million or 50% of total project costs. For specialized equipment, this is limited to the lesser of CAD\$5 million or 50% of total costs, and for feasibility studies this is reduced to the lesser of CAD\$500,000 or 50% of total costs.¹⁷⁵

2.6.4 Incentives

There are no municipal incentives or tax credit for creative enterprises, although this has not always been the case. In 1999, Ontario introduced the provincial Sound Recording Tax Credit. While this was phased out in 2016 for undisclosed reasons, the details are listed below for reference. In order to qualify, applicants must:

- Have been in operation for 12 months as either a corporation or (for musicians) a sole proprietorship/partnership.
- Have earned over 50% of their taxable income in the province the preceding tax year
- Have distributed and marketed at least one sound recording during the previous tax year
- Have been at least 50% comprised of sound recording-related activities¹⁷⁶

The sound recordings also had qualifiers, including that a Canadian (citizen or permanent resident) was the primary composer or writer, or that the recording took place in Ontario by a

¹⁷³ SOCAN Foundation (2021a)

¹⁷⁴ SOCAN Foundation (2021a)

¹⁷⁵ Government of Canada (2021b)

¹⁷⁶ INAC Services (2016)

domestic company. Recordings should have been at least 15 minutes long and could not be used for promotional or instructional purposes. Additionally, the production team making the recording must have retained exclusive control of the masters for at least five years post-recording. The credit was for 20% of qualifying expenditures, which included (but was not limited to) musician fees, permits and licensing, event planners, royalties, graphics, programming, testing and digital scanning as well as production costs for music videos that were domestically made or produced by a Canadian. 100% of expenditures within Ontario were eligible, as well as 50% of expenditures outside the province (such as for marketing or music video production).¹⁷⁷

2.6.5 COVID-19

Hamilton's Creative Industries and Cultural Development maintains a full list of both financial and in-kind COVID-19 relief initiatives available to local musicians, including:

- The Behind the Scenes Basic Needs Grants aim to help entertainment technology workers in both the US and Canada who are seriously ill or injured. Applicants must submit proof of at least five years of work history and a letter from their doctor, but an additional cover letter explaining their situation, and a copy of the bills they need to use the grant towards, are highly recommended. Grant amounts are not published and are assessed on an as-needed basis.¹⁷⁸ The BTS Foundation is a non-profit 501(c)3 organization which raises money through events, programs and donations.¹⁷⁹
- The AFC is offering emergency financial assistance for entertainment professionals to cover essential and immediate costs such as utilities, rent or mortgage, medical bills and groceries. Award amounts vary, and applicants are encouraged to ask for however much they need, but the AFC warns that requests under CAD\$1,500 will be processed quicker. Due to limited funding, applicants are asked to utilize all avenues of support before reaching out to AFC, and those who have money to cover two months worth of living expenses are asked to postpone applying until they are in more immediate need.¹⁸⁰ The AFC receives support from a variety of donors and sponsors to help fund its initiatives.¹⁸¹
- The Canada Council for the Arts, a federally funded council, was providing micro grants of up to CAD\$5,000 through their Digital Originals fund, which supported artists and arts organizations as they shifted to a digital medium to share their work. Funded projects were given their own CBC/Radio-Canada website and were featured on CBC/Radio-Canada platforms. Funding was provided in partnership with the RBC Foundation. In order to be eligible, applicants must comply with social distancing and other health regulations, fairly compensate all involved artists and parties, and obtain

¹⁷⁷ INAC Services (2016)

¹⁷⁸ BTS Foundation (2021a)

¹⁷⁹ BTS Foundation (2021b)

¹⁸⁰ AFC (2021a)

¹⁸¹ AFC (2021b)

written permission for any third-party content.¹⁸² Open to all arts disciplines, the Council had dispersed CAD\$5.2 million to over 1,000 projects by the end of the program's run, including for a live-streamed rooftop concert.¹⁸³

- Livenation's Crew Nation Fund works to help behind-the-scenes tour crew workers who lost employment as a result of the pandemic. This was a global initiative, raising over US\$18 million through socially distanced events and auctions. It helped 15,000 crew members in 40 different countries meet bills, housing costs and medical expenses.¹⁸⁴ A second round of funding was made available to those who had received funding during the first round. Applicants were chosen based on the immediacy of their needs by the Music Forward Foundation, a 501(c)3 organization.¹⁸⁵
- The David Seguin Memorial Award for Accessibility in the Arts, a family-run fund, is generally presented at the Toronto Fringe Festival, but 2020 saw the funding go towards emergency relief instead. A total of 35 artists with disabilities received CAD\$100 grants to help them meet immediate bills such as utilities or groceries. No further details on the selection process have been published.¹⁸⁶
- SOCAN's Encore! program works to compensate artists for their virtual and live-streamed concerts by pulling revenue from Facebook licensing. The fund released approximately CAD\$200,000 each quarter, divided into grants of CAD\$150 for those Facebook Live or Instagram Live events which featured 30 minutes of content or 10 songs/compositions, had at least 100 viewers and sent a set list to SOCAN.¹⁸⁷
- Facebook was offering US\$100 million in cash grants for small businesses across 30 countries, including Canada. Grants were awarded as a combination of cash awards and advertising credits. Applicants must be for-profit, over one year old and employ between 2-50 people.¹⁸⁸
- Glad Day is collecting donations for an emergency fund which will help LGBTQ2S artists and other tip-based or performance-based workers whose income has been deeply affected by the pandemic, recognizing that such artists often do not have familial support or financial care to fall back on. The organization has been transparent about how donations are redistributed, aiming to use 30% towards securing paid work for performers, 30% towards immediate grants for costs of living such as rent and utilities, 10% as no-interest loans, and 30% towards organizational and administrative costs. The organization achieved their CAD\$100,000 goal within the first week, which it dispersed across 300 artists, performers and tip-based workers. It has set a new goal of CAD\$250,000.¹⁸⁹
- MusicTogether is a living room concert series presented by Ontario Live, a subsidiary initiative of the Government of Ontario's agency, Destination Ontario. Run by volunteers, MusicTogether provides direct funding, eCommerce tools and audience

¹⁸² Canada Council for the Arts (2020a)

¹⁸³ Canada Council for the Arts (2020b)

¹⁸⁴ Aswad (2021)

¹⁸⁵ Live Nation Worldwide Inc. (2021)

¹⁸⁶ David Seguin Memorial Award (2021)

¹⁸⁷ Druckman (2020)

¹⁸⁸ Rogers (2020)

¹⁸⁹ Glad Day (2021)

growth opportunities using its CAD\$300,000 funding pool collected from donations and a monetary match from OntarioLive. Applicants must have been a permanent resident of Ontario for at least one year, must have derived the majority of their income from music and must live-stream their concert via Facebook or Instagram.¹⁹⁰ Additional resources are available on the MusicTogether website, including best practices for performances, advice on how to set up an online merch store and how to set up a donation page.¹⁹¹

- The Hamilton Arts Council's Artist Relief Fund was a local option catered specifically to Hamilton's artists. Funded by community donations, artists could obtain grants ranging from \$100 to \$1,000 by submitting their CV and a declaration of lost earnings via a portal on the Arts Council's website.¹⁹² This fund has since been replaced by the Save the Arts initiative, which connects donors directly to local arts organizations and collectives via an online directory.¹⁹³

In 2021, the Ontario government announced a \$2.5 million investment scheme through the Unison Benevolent Fund COVID-19 Relief Program and the Canadian Live Music Association. Of this, \$2 million will go to the Unison Benevolent Fund to support individual musicians and industry workers who've lost their jobs or income due to the pandemic, while the remaining \$500,000 will go to the Canadian Live Music Association to help develop music city strategies for their communities.¹⁹⁴ In order to qualify for Unison funding, which grants successful applicants \$1,000 towards basic living expenses,¹⁹⁵ applicants must have primarily worked in the music industry for at least two years or 55% of their career and, if over 65, have earned at least 55% of their income from the Canadian music industry.¹⁹⁶

2.7 Music Tourism and Branding

Most music venues are clustered in Hamilton's downtown core, with a few dotted around outlying neighbourhoods. There are also several festivals in the area, including Festival of Friends, Supercrawl (which won Tourism Event of the Year in 2015¹⁹⁷), and the Sound of Music in nearby Burlington, as well as many additional festivals, fairs and events that feature live music even if their programming does not revolve around it.

Tourism Hamilton is the city's agency for promoting Hamilton as a destination for leisure visitors as well as business visitors. Their website contains an 'arts & culture' page, with

¹⁹⁰ MusicTogether (2021a)

¹⁹¹ MusicTogether (2021b)

¹⁹² City of Hamilton (2021u)

¹⁹³ Hamilton Arts Council (2021)

¹⁹⁴ Queen's Printer for Ontario (2021)

¹⁹⁵ Unison Benevolent Fund (2021a)

¹⁹⁶ Unison Benevolent Fund (2021b)

¹⁹⁷ Canadian Press (2015)

results that can be further specified to list ‘music venues’, although no other reference to the local music scene is made. Sports tourism, however, has its own main category within the site-wide hamburger menu.

As part of the Entertainment District development agreement, the Precinct Group was made monetarily and strategically responsible for the operations and management of the FirstOntario Centre and FirstOntario Concert hall for 99 years (until 2119) and the Hamilton Convention Centre indefinitely. By shifting monetary responsibility to a third party, this agreement wipes the city’s subsidization and capital commitments and is thus expected to save Hamilton taxpayers \$155 million over a 30-year period. The FirstOntario Centre will undergo a \$50 million renovation to introduce features such as a curtaining system for the upper bowl balcony, microbrewery sites and suites for fans and street-level leisure amenities. Renovations to the Convention Centre, FirstOntario Concert Hall and Art Gallery are estimated at \$16 million. Arena renovations are expected to begin in the Fall of 2021.¹⁹⁸

In 2018, the Government of Ontario, via its Ontario Live Music Working Group (LMWG) published A Vision for Ontario’s Live Music Industry after five years of research. The strategy aims to leverage existing resources to promote the province’s live music sector by leveraging existing infrastructure, utilizing online resources and positioning Ontario as a premier global music destination. A large part of the vision’s success is dependent on quantifying the fiscal impact of the live industry in order to reinforce its value to the government and communities as an economic driver worth supporting.¹⁹⁹ Nordicity has since spearheaded a study on the economic impact of Toronto’s live music venues,²⁰⁰ and Ontario Creates maintains some data based on indicators from Statistics Canada,²⁰¹ but no quantitative studies have been conducted at a provincial level since the publication of the Vision. The report emphasizes the importance of supportive municipal licensing and zoning, diversity in programming, diversity in venue sizes, all-ages venues and events and support for grassroots venues and artists. In terms of promotion and audience-building, recommendations include cross-sector collaboration (particularly with hospitality industries and tourism organizations); a multi-industry coordinated marketing strategy; skills building for grassroots professionals around understanding; and utilizing audience metrics and a provincial music calendar.²⁰²

¹⁹⁸ City of Hamilton (2020a)

¹⁹⁹ Ontario Government (2020)

²⁰⁰ Nordicity (2020b)

²⁰¹ Ontario Creates (2021b)

²⁰² Ontario Government (2020)

3. Comparative Analysis

3.1 London, ON

London Music Strategy²⁰³

The London Music Strategy was published in 2014 by London's Music Industry Development Task Force, a collective of 22 music industry stakeholders (artists, managers, venue owners, organizations, etc.) put together by the City of London after seeing similar music strategy-led initiatives in cities such as Austin and Toronto. The Music Strategy seeks to focus on some of the findings and strategies set forth in the city's Cultural Prosperity Plan, which calculated that cultural activity contributes CAD\$540 million to the city's GDP and accounted for 7,703 jobs.

An initial SWOT analysis identified London's strengths as affordability, proximity to larger markets, choice of venues, diversity of music scene, growing creative class and tech sector, and annual events calendar. Weaknesses included transportation, artists driving their fees down to compete for performance opportunities, lack of audience awareness or valuation of the local scene, inconsistent bylaws and regulations, and artists' lack of business knowledge. Priority opportunities derived from these findings are listed below, with updates italicized where available:

- Extend the London Music Industry Development's Task Force into a permanent volunteer committee (the Task Force requested CAD\$150,000 per year for two years from the city in order to fund this). *(Note: while this Task Force has not been made permanent, the London Music Office does have four additional task teams, outlined in the next section)*
- Create a London Music Office or permanent representative position that acts as economic developer, marketing director and business manager. *(Note: the Office was created in 2015)*
- Increase live music across the city by maximizing city spaces and working with local organizations.
- Develop audiences by engaging with school programs.
- Update local regulations and by-laws for more music-friendly policies, such as a formalized busking policy or tax incentives. *(Note: although no formalized busking policy or tax incentives are in place yet, the London Arts Council now runs London Arts Live, a paid busking programme in Forest City²⁰⁴)*
- Obtain investment to support certain actions items (this was not expanded upon).
- Build the music industry resources by compiling a directory, mailing list or the like. *(Note: a directory is now available on the Music Office website)*

²⁰³ London's Music Industry Development Task Force (2014)

²⁰⁴ London Arts Council (2021)

- Increase promotional efforts through a targeted marketing campaign that pushes London as a production hub and a music education hub.
- Support music tourism in a similar manner to sports tourism by coordinating with local tourism bodies and targeting out-of-town audiences. *(Note: Culture and Entertainment Tourism is now a separate button on the Tourism London Website, similar to Sport Tourism)*
- Capitalize on low cost of living and location strengths to attract tech and music businesses.
- Create a residency programme for out-of-town musicians.

The threats identified at the time of research were a general failure to promote London's vibrant and diverse music scene, a failure to develop local talent and a failure to obtain some of the CAD\$45 million Ontario Music Fund Grant money that was available at the time. To date, London has now incorporated a Music Office and begun a promotional push for its local music industry.

London Music Office

Since 2015, London's music industry has been serviced and supported by the London Music Office, a division of The City of London Economic Development & Planning Department and a similar organization to Tourism London. The Office is led by a London Music Industry Development Officer, whose role it is to provide guidance for music events, obtain licensing for music businesses, mediate between City Hall and industry stakeholders, lead on the design and implementation of a music strategy, manage issues and grievances aired by or against the local music industry and curate educational programming and networking opportunities.²⁰⁵

The Music Office also has four task teams:

1. The Education & Incubation Task Team - composed of education leaders around London
2. The Business Development Task Team - composed of leaders in manufacturing, recording, production, tech, retail and other music industry subsectors
3. The Musicians Task Team - a team of eight musicians and artist managers from various genres and backgrounds
4. The Events & Venues Task Team - a team of six professionals such as promoters, venue owners and other live industry professionals

Two members are pulled from each of these task forces to form a further London Business of Music Committee. Although the committee is supposed to be held bi-monthly or as needed,

²⁰⁵ London Music Office (2021a)

the last meeting agenda uploaded to the Music Office website was for December 2016. However, the contact portal is still open and active.

The Music Office's website is a hub of information and resources, including a full list of funding sources both regional and national; an events calendar; additional regional, national and minority-specific awards programs which local artists may be eligible for; industry news updates and a map of poster board locations throughout the city which can be utilized to promote upcoming events and releases. All relevant city regulations and links are available for reference, where they have been extracted and condensed to make them easier to comprehend. Additionally, there are several guides published on the website. Although they are not exhaustive resources, they provide a summary of considerations as well as links to each relevant item for further information. Topics include opening a live music venue²⁰⁶, obtaining a temporary sound permit for patios or events²⁰⁷ and promoting good neighbour habits between surrounding businesses and residences in regards to patron behaviour and noise control.²⁰⁸

In 2016, the London Music Office began taking a census of the local music industry. Over the course of six weeks, 1,536 anonymous surveys were collected in five categories: musicians, venues, festivals/event organizations, music industry professionals, and fans. Key findings included a propensity towards popular music, a lack of businesses applying for grants due to low resources or lack of time, and a most-active demographic of those between the ages of 19-34. The Office considers this survey a preliminary investigation, with further work needed to both expand the participant base and refine the survey for more reliable answers moving forward, but recognizes it as an invaluable tool for quantifying the music industry.²⁰⁹

In addition to the Music Office itself, Tourism London has a Culture & Entertainment Department which works with both private sector and public organizations to attract and promote events in the city which not only increase visitors but boost London's reputation as an entertainment destination. They offer event development, consulting, marketing and publicity services and can also help coordinate event organizers with local venues or relevant city departments. In addition to its online events calendar, Tourism London maintains an online directory of local music venues geared towards assisting event organizers.²¹⁰

Music, Entertainment & Culture Districts²¹¹

In 2018, the City of London released a strategy to introduce more music and cultural districts throughout the city. It recognized the juxtaposition of increasing residential populations while promoting entertainment and culture, as well as the gap in regulations and their enforcement

²⁰⁶ Service London (2021a)

²⁰⁷ Service London (2021b)

²⁰⁸ City of London (2021b)

²⁰⁹ London Music Office (2016)

²¹⁰ Tourism London (2021a)

²¹¹ City of London (2018)

when it comes to differentiating between not-for-profit and for-profit organizations. The report defines a cultural district as that defined location that hosts a concentration of music venues and entertainment and often operates under different regulations than the rest of a city because of it. By formally naming an area a district, it sets an expectation for both residents and business owners to expect more lively surroundings and take more responsibility for an improved experience for patrons, respectively, and it defines music and culture as valued economic drivers.

After consulting with local stakeholders and city authorities and looking to other cities for their entertainment district policies, London created a strategy that would celebrate and promote cultural activity, streamline the processes that facilitate events and activity and mitigate the impacts of said activities. The following changes were proposed (any action taken on said recommendations is listed in *italic*, where applicable):

- Extend the current 11pm noise curfew to 12am on private property (public property to remain at 11pm).
- Change noise measurement techniques to take into account the context of ambient noise and allow the city enforcer more flexibility in where to measure decibels from.
- Allow for amplified sound and dancing on patios, and adjust the licensing for such activity according to the size and layout of each patio, rather than issuing one-size-fits all licenses. (*Note: in 2021, amplified sound on a patio was approved for eight locations, ranging from breweries to restaurants and a church²¹²*)
- Require sound mitigation plans from all event organizers, and work with venues in the downtown core area to have better soundproofing infrastructure.
- Expand use of city parks in the core downtown area and main street districts, but require larger security deposits for high-impact events in surrounding areas.
- Require event organizers to submit a waste management plan, subject to a security deposit hold.
- Increase the maximum fenced off area allowances for city park events in order to better serve ticketed events and liquor sales.
- Work with community organizations to create more streamlined road closure strategies for events according to their experienced needs, and create a list of road closure preferences for the downtown core area.
- Work with city transport authorities and private transportation services to increase services during large-scale events and ease congestion.
- Create a comprehensive list of events and their community impact (such as road closures or noise) for city residents to reference online, and require direct outreach from event organizers to make residents better informed of upcoming changes to their routine. (*Note: the city's Special Events Policies and Procedures Manual now states that event organizers are required to submit an approved petition signed by at least 66% of affected businesses and residents if closing a street²¹³*)

²¹² City of London (2021c)

²¹³ City of London (2021d)

- Create a better wayfinding system for all major venues and events.
- Establish cultural district significance by incorporating gateway infrastructure, different lighting and signage to differentiate the areas.
- Create a pilot fund to subsidize the costs of advertising for event organizers.
- Consider temporary licensing to allow vendors in public-right-of-way passages near major venues or events.
- Reduce restrictions, such as park rental fees and gated/ungated fees, applied to for-profit event organizers hosting events in outlying main street districts and the downtown core area.
- Working with local districts and BIAs to coordinate regular, consistent local programming in outlying cultural districts and main street areas.
- Upon introducing the cultural districts, create a collaborative network between them.

Forest City London Music Awards

The Forest City London Music Awards (FCLMA) is a non-profit organization which spearheads several initiatives in the area. It is run as a non-profit, with sponsorship coming from several organizations, including Unifor (the nation's largest private sector union), Tourism London, the City of London, Downtown London, the London Arts Council, the London Music Office and the London Music Association.²¹⁴ Many branch initiatives have grown from the organizers and are presented as part of a greater series of programs to lead up to the ceremony, including:

- **Forest City London Music Awards** - the pinnacle of FCLMA's programming, this ceremony has seen several monikers since its 2005 launch, recognizing and nurturing talent in the London area. The awards are voted on by the public, and artists are paid for their performances during the evening.²¹⁵ A Lifetime Achievement award is also available, with the winner chosen by the Steering Committee and Board, led by FCLMA co-founder and chair Mario Circelli. In order to be eligible, artists must have released a new song and performed in London or its surrounding area at least once in the year preceding the Awards Gala, be active in London and its music community, and be from (or, in the case of bands, have a majority of members from) London and its surrounding area.²¹⁶
- **London Music Week** - this celebration launches with the FCLMA Jazz and Classical Awards Show and closes with the FCLMA Pop & Rock Awards Gala Show. Several events throughout the week recognize local musicians and music venues, with other activities including professional development seminars and a career day. It is the joint effort of the FCLMA's Board of Directors and 60 additional volunteers from the Steering Committee, which features a rotation of industry professionals across the fields of music, media, education and politics.²¹⁷

²¹⁴ Forest City London Music Awards (2021a)

²¹⁵ Forest City London Music Awards (2021b)

²¹⁶ Forest City London Music Awards (2021c)

²¹⁷ Forest City London Music Awards (2021d)

- **London Music Hall of Fame** - curated by the Forest City London Music Awards, this is the only city-specific music hall of fame in the nation. Many industry leaders have been inducted for their commitment to music as a career as well as their community and industry impact.
- **Educational programming** - presented in accordance with the awards, this element sees industry professionals from both the business and performance sectors offering masterclasses, feedback sessions and experiential learning opportunities (as awarded through a Battle of the Bands competition).
- **Ken Palmer Bursary** - this scholarship is awarded to a high school graduate that will go on to study music education at a tertiary institution in Ontario.

One unique initiative in the city is the National Anthem Program, in which local musicians play ahead of each city council meeting. In order to participate, artists must create a profile through the London Music Office website and follow up with an inquiry email. If selected, performances are recorded and the videos are uploaded to the office's website for public viewing. Performances occurred regularly from January 2019 until the initial COVID-19 shutdowns in March 2020.²¹⁸ In April 2021, the city also introduced its 'Music on Hold' program, playing local musicians as hold music for any calls made to city offices.²¹⁹

COVID-19

Before the pandemic, there were approximately 4,700 live music events across the city each year, accounting for around 1,000 FTE jobs in the support sector (ie. excluding performers).²²⁰ The London Music Office has been key in both coordinating and promoting several recovery-focused initiatives to support the sector during the pandemic and create a foundation for achieving those numbers again post-pandemic. Resources include:

- Provincial and national funding streams, as shared with Hamilton, including the UNISON Fund, CIMA and Music Ontario
- A list of local PPE suppliers and disinfecting services
- Links to the Middlesex-London Health Unit, which maintains the city's most formal medical-led COVID-19 updates
- Links to mental health services from:
 - BounceBack Ontario - a free, guided self-help program involving over-the-phone coaching, workshops and videos for people ages 15 and up. It is not meant to replace counselling services, but rather to teach coping mechanisms.²²¹

²¹⁸ London Music Office (2021b)

²¹⁹ Crossman (2021)

²²⁰ Tourism London (2021b)

²²¹ BounceBack Ontario (2021)

- The Over the Bridge Foundation - provides online peer support for musician or music crew needing mental health help and addiction recovery²²²

In February 2021, Tourism London announced the Revive Live program, a series of concerts whose aim is to safely bring live music back to various grassroots venues around the city and provide work for many live industry employees. The concerts, which are free to stream, are held Saturday nights at 8pm. Artists can sign up to be selected by creating a profile on the London Music Office's website, and venues are responsible for choosing who they would like to book for their show. The first phase of concerts concluded on April 10, and the second phase has been placed on hold due to renewed lockdown orders across Ontario.²²³

Lessons for Hamilton

London faces a similar challenge to Hamilton in that it is a smaller Ontario city looking to not only support its local music industry but also differentiate itself from Toronto as a great place to tour or settle down. Its Music Office's unique structure of task teams allows it to focus on different sectors of the music industry and their unique needs and developments, while making strides in each area.

The Office's website is also a great example of a user-friendly, one-stop shop for any information pertaining to the local music industry, regardless of which sector the visitor operates in. Guides create priceless resources for amateur music professionals, offering foundational knowledge with which to develop questions and strategies pertaining to their unique ideas (for example, someone who may want to open a music venue but doesn't know the first thing about licensing or structural considerations, let alone where to start looking for such information). Hamilton can expand upon such services by increased post-COVID promotion and offering more mentorship or consultation services for those ready to take their business plans or artistic careers to the next level.

London has done a great job of integrating the music industry and its events into tourism, with initiatives such as London Music Week, the London Music Awards and the London Music Hall of Fame highlighting local musicians ahead of the broader commercial industry. These present great marketing opportunities to integrate the local music industry with members of the community as well as tourists, and are a great incentive for musicians looking to live in a place with integrated promotional and performance opportunities.

²²² Over The Bridge (2021)

²²³ London Music Office (2021c)

3.2 Kingston, ON

Leadership

Kingston does not have a formalized music office or source of leadership. The Kingston Film Office, which opened in 2018, has some overlap with the industry by overseeing music video productions²²⁴ and Local 518 serves as the Kingston branch of the American Federation of Musicians.²²⁵ Membership to the union gives professionals access to legal assistance, working visa application assistance, medical and instrument insurance, marketing and business advice, pensions, and a network of other industry contacts.²²⁶

Visit Kingston, the official tourism website for the city, maintains quick-buttons at the top banner of the site for the Film Office, sports tourism and destination weddings, but no music or art-based tourism.²²⁷

Music Education Programs

The Kingston Symphony has introduced a YouTube series called Harmon in Space. Aimed at young children, each episode follows a puppet called Harmon the Hound as she tries to return to earth by playing pieces of music into her computer. This storyline allows a different instrument to be featured every episode, starting with the flute. The Symphony introduced the series as part of their greater desire to increase educational programming, particularly as students attended school from home during the pandemic closures. The show was created in partnership with Gazelle Automations, a Toronto-based production company.²²⁸

Queen's University operates Kingston Sistema, a free-to-attend after-school program for at-risk children in grades 2-4. Created in partnership with the Joe Chithalen Memorial Musical Instrument Lending Library and the Limestone District School Board, the programme follows the model of Venezuela's El Sistema, which promotes positive social change and free thinking in a group learning environment. El Sistema operates on five principles: social change through musical excellence, ensembles and group learning, frequency and consistency in learning, accessibility, and connectivity. The Kingston Sistema program provides an opportunity for Queen's University's Bachelor of Education students to work with the local community and engage in educational programming with children through research and internship roles.²²⁹ Instructors are hired from the surrounding Kingston community, while mentors and assistants will be drawn from secondary and tertiary student bodies and youth support workers.²³⁰

²²⁴ Stafford, Tori (2020)

²²⁵ Kingston Musicians' Union (2021a)

²²⁶ Kingston Musicians' Union (2021b)

²²⁷ Visit Kingston (2021)

²²⁸ Foley (2020)

²²⁹ Queen's University (2021)

²³⁰ Joe's Mill (2021)

Regulations

The Kingston noise bylaws prohibit amplified music at all hours in residential areas. Musical instruments, including percussive instruments, are prohibited from 9pm to 7am, although this is extended to 9am on Sundays.²³¹

In November 2018, the city began a review of its special events policy with the aim of reassessing appropriate event locations and promoting more equitable distribution of event locations in order to service all communities. After a series of forums and public consultations, a new events policy was introduced in the Spring of 2019.²³² The city's special events policy for city parks and facilities is laid out in a single document. There is a summarizing table identifying timeline and location recommendations depending on the size of the event as well as further detailing considerations to take regarding traffic control, insurance and local by-laws. Applications for exemptions to the noise bylaw must be submitted to City Council at least eight weeks prior to the proposed event.²³³

Kingston Arts Council

The Kingston Arts Council (KAC) is the catalyst for music and arts initiatives around the city. Its annual KAC In Conversation events offer the creative community a chance to engage with the community in order to share new ideas and introduce new ways of thinking. There is a small admissions fee of CAD\$5-10. Past topics have included creative placemaking and art and feminism.²³⁴

The Council's PLATFORM series presents professional development workshops for the creative community. Workshops are free to attend and have covered topics such as grant writing, social media marketing, starting a creative business, building an audience and securing corporate sponsorship. Post-event notes are often published on the KAC website for reference for those who couldn't attend.²³⁵

KAC has been proactive in promoting and pursuing equity across the city's arts disciplines through its Arts & Equity Project. The Project was funded by a grant from the Ontario Arts Council and featured panel discussions to spur conversation around intersectionality, diversity and removing barriers to entry.²³⁶ One of the outcomes of the project was the Project's Organizational Audit Tool, which presents a scaling system for organizations to judge themselves in the eight areas: Staffing and Human Resources; Policies and Strategic Planning; Physical Environment; Programming and Audience; Marketing, Partnerships and Community Outreach; Budget Management and Fund Development; and Curation. The Audit, which is

²³¹ City of Kingston (2021a)

²³² City of Kingston (2018)

²³³ City of Kingston (2021b)

²³⁴ Kingston Arts Council (2020a)

²³⁵ Kingston Arts Council (2021a)

²³⁶ Kingston Arts Council (2019)

available for organizations to download for self-assessment, is followed by a questionnaire to promote reflection on the results and hypothetical actions.²³⁷

When COVID-19 hit, much of the Council's work shifted to outreach and recovery. They hosted a series of roundtables with the local arts community in an effort to gain a better understanding of how they have been affected by the pandemic. Five total roundtables were held for arts administrators, the music community, performance arts, visual arts and literary arts. Feedback from the roundtables uncovered the biggest short-term challenges as being loss of income and the gaps in skill set as everything shifted towards a digital platform, while long-term concerns centered around the continuation of emergency funding and the uncertainty of audiences being comfortable returning to concert settings. Creativity and collaboration has shifted to a digital realm, while artists have placed a stronger emphasis on connecting with their fans via social media. When asked what resources would be most useful for the artists, they requested a directory-like collection of industry contacts, assistance with mental health services and access to physical creation or rehearsal space with appropriate recording equipment. To address this feedback, the Council has created discipline-specific Slack channels to aid in stakeholder communication and are looking into creating a 'think tank' to keep the conversation alive, as well as a creative database to assist in cross-discipline collaboration.²³⁸ Although the Council held follow-up roundtables a month later, many of the discussion points remained the same.²³⁹ No roundtables have been held since economies have been tentatively opening up around the globe.

COVID-19

The Kingston Arts Council maintains a list of fiscal or in-kind resources available to the city's artists.²⁴⁰ Except for the Council's own funding schemes, there were no city-led or otherwise local resources for artists until April 2021, when the City of Kingston announced a \$1.5 million support program which awards grants in four categories: businesses, not-for-profit groups, recreational organizations and artists. \$100,000 of this fund is specifically put aside to provide grants between \$1,000 and \$2,000 to professional artists, while an additional \$100,000 is dedicated to a broader category of artists, art collectives and not-for-profit arts groups. Details regarding the application process and qualification elements have not yet been released.²⁴¹

The Kingston Arts Council will also provide pandemic relief through its City of Kingston Arts Fund, setting aside \$200,000 for Resiliency grants and Adapt grants.²⁴² The Adapt program supports projects that create, present or adapt artistic work, build partnerships or address community needs in innovative ways. Grants will range from \$4,000 to \$10,000 and can be used for costs including artist and production fees, space rental, marketing and promotion,

²³⁷ Kingston Arts Council (2020b)

²³⁸ Kingston Arts Council (2020c)

²³⁹ Kingston Arts Council (2020c)

²⁴⁰ Kingston Arts Council (2021b)

²⁴¹ Ferguson (2021)

²⁴² Kingston Arts Council (2021c)

equipment costs and more. Full grant guidelines will be available June 2021.²⁴³ The Resiliency program provides artists across multiple disciplines with grants of either \$1,000 or \$2,000 to continue creating or building skills in a safe and distanced environment. Eligible costs include educational courses, artist fees, marketing, space and equipment rental, website development costs, and childcare.²⁴⁴

Lessons for Hamilton

Although Kingston also faces the challenge of differentiating itself from Toronto, there is very little organized effort at a city level to organize and/or support its local music industry. Much of the existing work is led by passionate music fans or the local arts council, a charitable organization, rather than the city itself, although the city did provide dedicated relief funds for artists in light of COVID-19. Hamilton sets itself apart as a leader in this case, not only in terms of quantifying and promoting its music economy, but in maintaining friendlier and more transparent noise and event regulations, as well as auditing existing regulations for further amendments.

3.3 Brooklyn, NY

Mayor's Office of Media and Entertainment

The New York Mayor's Office of Media and Entertainment (MOME) oversees the creative economy management across all five of the city's boroughs, including Brooklyn. Currently led by commissioner Anne del Castillo, the agency is divided into four sectors: The Office of Film, Theater and Broadcasting; NYC Media; the Office of Nightlife; and workforce and creative initiatives.²⁴⁵

In 2017, MOME conducted an economic impact assessment of the city's music industry, which discovered that music accounted for 60,000 jobs (31,400 directly), approximately US\$5 billion in wages (US\$2.8 billion directly) and approximately US\$21 billion in total economic activity (US\$13.7 billion directly). The report highlighted where in the city's five boroughs most musical activity takes place, with Brooklyn coming in second to Manhattan.²⁴⁶

The Brooklyn Borough Council folds music into a broader 'Arts & Culture' category, with most initiatives driven by cultural exchanges with foreign representatives. The Council does organize the Central Brooklyn Arts and Culture Weekend, which features music alongside

²⁴³ Kingston Arts Council (2021c)

²⁴⁴ Kingston Arts Council (2021d)

²⁴⁵ City of New York (2021a)

²⁴⁶ Mayor's Office of Media and Entertainment (2017)

other performance disciplines and cultural showcases, but no music-specific initiatives are carried out.²⁴⁷

Nightlife

A 2019 assessment of New York City's nightlife showed it to be a US\$35.1 billion industry which supported 299,000 jobs worth US\$13.1 million in employee wages. While most of this fell into the food sector category, the job market within venues was shown to be growing by 3%, and employee compensation at venues was shown to be growing by 9%. As of 2019, venues were worth \$1.2 billion in economic output, supporting 19,900 jobs and generating US\$373 million in wages. Until the pandemic hit, jobs were growing at a rate of 3%, and employee wages were growing at 9%. Arts & Culture comprised US\$3.1 billion in economic activity, supporting 18,300 jobs and US\$804 million in wages. Brooklyn was shown to have the largest growth in its nightlife, with an annual growth rate of 5%. As of 2016, there were 5,500 nightlife establishments across the borough, and as of 2019, its nightlife sector accounted for 31,100 jobs and US\$608 million in wages.²⁴⁸

The Mayor's Office of Media and Entertainment operates a subsidiary Office of Nightlife which works to mediate between the nightlife industries, local community and city authorities. It maintains a full list of city resources on its website, organized by their appropriate city (or state, for liquor) department. Links cover topics such as building permits, zoning and land use guidelines, workers rights, noise ordinances, food permits and grades and small business assistance through the city's Department of Small Business Services.²⁴⁹

One of their initiatives is the Mediating Establishment and Neighborhood Disputes (MEND) program, which offers free mediation services between businesses and residents as a means of resolving conflicts before lawyers become involved. As of April 2021, 40 conflicts had been attended to, with the most common outcome being an exchange of phone numbers between the two parties for them to resolve anything else directly in the future.²⁵⁰ The Office of Nightlife also compiles and publishes a comprehensive list of all responses to public disturbances. This has helped them streamline information previously spread across multiple responding agencies, including the police, fire, Department of Health and Mental Hygiene and the Department of Environmental Protection.²⁵¹

Busking and Public Performances

Noise restrictions for commercial establishments playing music throughout New York City are set at 42 dB(A) as measured inside nearby residential units and seven dBA above ambient

²⁴⁷ Brooklyn Borough Council (2021)

²⁴⁸ NYC Media & Entertainment (2019)

²⁴⁹ Mayor's Office of Media and Entertainment (2021a)

²⁵⁰ Kletter and Palitz(2021)

²⁵¹ NYC Office of Nightlife (2020)

(measured at the street or a public right-of-way at least 15 feet from the source of noise) between 10pm and 7am. Bass sounds are limited to six dB(C) above ambient if ambient levels exceed 62 dB(C). Non-emergency noise complaint calls can be made to 311, and complaints will be addressed with a scheduled inspection. If found to be non-compliant, offending businesses may be permitted to correct the violation via change in sound levels or physical soundproofing amendments to avoid penalties.²⁵² This process sets a good example of communication and proactivity. By proactively giving venues the chance to make structural changes, the borough is addressing the root of the problem and allowing the venues in question to sustain the desired level of noise in a way that does not greatly hinder their operational structure, rather than exposing them to risk of another fine.

Buskers may need a permit depending on the nature or location of their performance. Auditions are held each spring for buskers at the Staten Island Ferry terminals. After reviewing applications, 65 artists are chosen to perform a five-minute audition at Grand Central Terminal for a panel of music industry professionals, cultural institution leaders and Metro Transit Authority (MTA) station operators.²⁵³ For performances in the street, buskers do not need a permit unless they use a sound system such as a loudspeaker, megaphone or stereo, or if they are performing in or next to a park.²⁵⁴ In order to play at a city park, musicians must obtain a Special Events Permit at a cost of \$25. Applications can take up to 30 days to process.²⁵⁵ Subway performers do not need to obtain any permitting, but they must abide by the MTA's Rules of Conduct. While the rules cover any and all personnel utilizing the system, those applicable to buskers include no sound amplification devices being permitted on the subway platforms, no noise in excess of 85 dBA as measured five feet from the sound source or 70 dBA as measured 2 feet from a station booth.²⁵⁶

A new permit has been created in light of the COVID-19 pandemic. Dubbed the Open Culture Permit and issued by the Street Activity Permit Office (SAPO), it allows cultural institutions and entertainment venues to hold socially distanced performances at over 200 locations across the city. Venues must submit proof of programming to be eligible, and SAPO may ask for additional information or supplemental documentation in order to ensure the venue qualifies as a cultural institution. Permits are good for a one-month period and allow a maximum of four events across the given month, with 500 people permitted per event. Events may last no longer than 12 hours, including set-up and tear-down times, and if the recipient chooses four consecutive days of events, they must completely tear down between each day. Applications are considered in the order they are received, and the program is expected to run until October 2021.²⁵⁷

²⁵² NYC Environmental Protection (n.d.)

²⁵³ MTA (2021a)

²⁵⁴ City of New York (2021b)

²⁵⁵ City of New York (2021c)

²⁵⁶ MTA (2021b)

²⁵⁷ City of New York (2021d)

Career Development

Career development initiatives include Sound Thinking, the #MyNYCSong Contest and the Made in NY Career Panels. Sound Thinking works with aspiring artists and music industry professionals via a free, three-week summer intensive and an additional free, 12-week after-school program, introducing them to potential career paths via site visits, new technologies and industry trends.²⁵⁸ The initiative is specifically focused on providing opportunities to women and other underrepresented demographics in the industry.²⁵⁹

The #MyNYCSongContest is a partnership with the non-profit Guitar Mash and invites applicants to present songs inspired by New York City. Winners receive a recording session at a professional studio, mentorships and a performance spot at the City Winery music venue.²⁶⁰

Finally, the Made in NY Career Panels are hosted regularly throughout the year on topics throughout the creative and media industries. Past music-focused panels have included “Careers in Music: Labels, Management, Live & Beyond”, “Where the Jobs Are: Music”, “Staying Live: Music and Entertainment” and “Music + Tech - Getting the Music Heard”.²⁶¹

Youth Outreach and Diversity

The most prominent music-focused initiative is New York Music Month, an annual celebration of the city’s diverse music scenes across all five boroughs. Every June, the city presents a concentrated calendar filled with free concerts, workshops, walking tours and other resources for fans and professionals alike. 2021’s programming was expanded across six months, from January until June, to present free virtual events and promote social distancing.²⁶² Performances and workshops highlighted diverse perspectives across the industry, including a presentation from queer black musician and artist Michael Mwenso, an International Women’s Day celebration in partnership with the Consulate General of Canada and panel discussions and performances presented by the NYC Women’s Fund.²⁶³

The NYC Women’s Fund for Media, Music and Theatre works to address underrepresentation of women-identifying artists and arts professionals by offering grants to help fund creation. Music recordings and videos are eligible if created by a female-identifying artist and if they offer a strong female perspective or have a female songwriter or engineer. Recording must be original pieces of work and applicants must demonstrate two of the following: a growing fan base, recent performance schedule, media coverage, awards or honours and previous funding. If chosen, recipients must coordinate some public access to music by committing one free performance during New York Music Month, donating time to MOME youth outreach

²⁵⁸ City of New York (2021e)

²⁵⁹ The Creative Arts Team (2021)

²⁶⁰ City of New York (2021f)

²⁶¹ City of New York (2021g)

²⁶² City of New York (2021h)

²⁶³ NYC Media & Entertainment (2021)

programmes or another pathway discussed with fund organizers.²⁶⁴ Overseen by the New York Foundation for the Arts (NYFA), the maximum grant awarded is US\$20,000. 2020s recipients received a total of US\$2 million, the second round of a US\$5.5 million fund provided by the Mayor's Office of Media and Entertainment.²⁶⁵

In 2006, MOME also launched the Made in NY Awards, which recognizes people and businesses which significantly impact the city's creative industries. Although many winners are household names, the selection process also values work done behind the scenes to give back to the creative community or encourage diversity and inclusion. Most past recipients have been in the acting realm, although music professionals are eligible for recognition.²⁶⁶

New York City's Queer Urban Orchestra is the first orchestra dedicated to serving the LGBTQI+ community. First launched in 2009, the orchestra is now home to 60 musicians and welcomes auditions regardless of race, religion, sexual orientation or gender identity.²⁶⁷

The Brooklyn Conservatory of Music introduced its Music Partners program in 1988 as a response to a reduction of music curriculum in the city's public schools. Today, the conservatory has 24 schools, 8 youth centers and 3 senior centers across Brooklyn, the Bronx and Manhattan. In addition to its choral and orchestral classes, it offers a course in West African Drumming. Students learn traditional West African percussion rhythms, hand rhythms, technique, etiquette, form and style on Djembe and Songba drums. These classes are part of its greater Music Partners programme, which was created in 1988.²⁶⁸

The Brooklyn Youth Music Project is a 501c(3) organization previously funded by the city and state's respective Departments of Cultural Affairs and the Brooklyn Arts Council. Its programming ranges from school-year length jazz ensembles and orchestras to a two-week summer intensive. In addition to learning technique and theory, the year-long program features guest lectures from Brooklyn-based artists, and the summer camps feature music history lessons. All children who pass the audition process are automatically eligible for need-based financial assistance.²⁶⁹

The Brooklyn Academy of Music began seven residency programs in 2020 as part of their goal to present artists with a broader range of disciplines and give opportunities to artists at all stages of their career development. Residents receive \$5,000 and access to the Academy's rehearsal rooms and theatres. 2020's residents include Art & Power founders 7NMSI E + M. Art & Power is an initiative that promotes innovation, purpose, radical

²⁶⁴ New York Foundation for the Arts (2021a)

²⁶⁵ New York Foundation for the Arts (2021b)

²⁶⁶ City of New York (2021i)

²⁶⁷ Queer Urban Orchestra (2021)

²⁶⁸ Brooklyn Conservatory of Music (2021)

²⁶⁹ Brooklyn Youth Music Project (2021)

experimentation and creative thinking among black creatives. Another resident is JJJJerome Ellis, whose compositions and writings reflect Blackness and disabled speech.²⁷⁰

COVID-19

There are very few New York City-based relief initiatives for the city's musicians, compared to the level of industry concentration. Make Music New York²⁷¹ and Behind the Curtains Media²⁷² both maintain lists on their website primarily composed of statewide and nationwide programs from government agencies as well as arts organizations. The Mayor's Office of Media and Entertainment has also conducted a series of 'Town Call' meetings with various sectors of the nightlife industry, including music freelancers and nightlife employees, although the results have yet to be revealed.²⁷³

The New York Foundation for the Arts' COVID-19 Response Fund has distributed over US\$4 million to artists in need through programs such as online workshops and professional development seminars, active connections with the NYFA job board, online resources for mental health funding, and focused support for immigrant and minority artists who are disproportionately affected by the pandemic.²⁷⁴ Meanwhile, the Barbara and Carl Zydney Grant for Artists with Disabilities provides cash grants of up to US\$1,000 for artists aged 21 or over with a disability who have been practicing in their field for at least four years. Finally, both Advance NYC Pro Bono Office²⁷⁵ and Volunteer Lawyers for the Arts²⁷⁶ are offering free legal advice and open discussing sessions, while the latter organization is also offering free online workshops covering topics such as the legal implications of crowdfunding and copyright protection.²⁷⁷

In April 2021, New York State released a 30-page guide for small and medium performance venues as they slowly re-open for scaled events. The guide outlines standards for physical distancing both indoors and outdoors, appropriate PPE for patrons and workers, operational procedures to track guest interactions and touchpoints, safe commerce procedures, structural ventilation amendments, proper cleaning procedures, phased reopening strategies, and COVID-19 screening and tracing.²⁷⁸

Lessons for Hamilton

Brooklyn faces a similar challenge to Hamilton in differentiating itself from the nearby industry concentrations of greater New York City and Toronto, respectively. As one of the five

²⁷⁰ BWW News Desk (2020)

²⁷¹ Make Music New York (2021)

²⁷² Behind the Curtains Media (2021)

²⁷³ Mayor's Office of Media and Entertainment (2021b)

²⁷⁴ New York Foundation for the Arts (2021c)

²⁷⁵ Advance NYC (2020)

²⁷⁶ Volunteer Lawyers for the Arts (2021a)

²⁷⁷ Volunteer Lawyers for the Arts (2021b)

²⁷⁸ Governor of New York (2021)

boroughs of New York City, it falls under the blanket of city-wide initiatives led by the Mayor's Office of Music and Entertainment. Although it has a more localized Borough Council, very little work is done to drive culture, and there are no music-specific initiatives led at a city level. Hamilton's city council is not shared by any other municipality, making it more approachable. Its music industry is also a more manageable size and has less overlap with surrounding communities, making it easier to define and present to the city council in order to create a music strategy around the city's unique needs. MOME's 2017 quantification of its music industry is a good example of value definition and helped highlight Brooklyn as an important contributor to the city's music economy; something Hamilton can use as a best practice in trying to advocate for its own industry.

As a destination, Brooklyn is known for its concentration of creatives, and the borough houses many of the city's prime music venues, including the Knitting Factory, Brooklyn Bowl, Brooklyn Steel and the Barclays Center, which expanded the local arena market previously dominated by Madison Square Garden. This reputation continued to grow as artists were priced out of Manhattan, and today even Brooklyn itself is a victim of increasing New York City costs of living. Hamilton is in a similar geographic position, poised to become an outlying haven for those who cannot afford the cost of living in Toronto but want to maintain access to its music industry. This is an opportunity to proactively develop and ensure the presence of industry businesses and professionals that allow musicians to maintain every step of their career within Hamilton, from conception to release and promotion.

3.4 Huntsville, AL

Huntsville Music Board and Music Officer

In 2018, Huntsville announced the development of a multi-year music plan as part of Mayor Battle's greater workforce development initiatives.²⁷⁹ The first piece which sprung from this Music Strategy work was the creation of the Huntsville Music Board. With its first meeting held in March 2020, the top priorities of the nine-member, volunteer board was to advocate for the creation of a full-time position with the City of Huntsville for a Music Officer, while other priorities included developing a Policy Toolkit to make meaningful policy changes to support music; hosting industry forums to promote discussion and economic growth; and developing an accessible music events calendar.²⁸⁰ In order to promote transparency, the city maintains an FAQ section online to communicate strategy costs and projected timeline, the roles and responsibilities of the Music Board and Music Officer.²⁸¹

²⁷⁹ City of Huntsville (2018)

²⁸⁰ City of Huntsville (2019)

²⁸¹ City of Huntsville (2021a)

The Music Officer position was funded in the 2021 City of Huntsville budget, at the recommendation of Mayor Tommy Battle and the Huntsville Music Board and will be filled in Q3 or Q4 of 2021. The primary responsibilities of the music officer are to serve as a resource for the local music scene and to assist in providing a sustained focus on music within local government to ensure positive impacts on policies, marketing, investment and infrastructure for music.

The Music Audit provided a scope of the city's music ecosystem, including its economic value, assets and participant experiences. From these results, a series of recommendations were created, divided according to priority. Top priority recommendations, in addition to what's mentioned above, include reassessing permitting processes and noise regulations, expanded music education resources, marketing a brand for the city, and programming for music in public spaces.²⁸²

Regulations

The city's sound ordinances vary depending on the zoning use of the area. Commercial or business zones are limited to 62 dB(A) at all times, while industrial zones may reach 70 dB(A). Residential areas, public space and institutional properties have limits of 55 dB(A) between 7am-10pm and 50 dB(A) between 10pm-7am. Measurements are taken at the property line. As written, the ordinance does not take into account ambient noise, which can be restrictive on music venues or bars with live music operating past 10pm.²⁸³

There are four districts throughout the city which act as the city's entertainment districts and hold most year-round music activities: Quigley, Meridian, Village of Providence and S.R. Butler Green. These districts are further marked by their open container laws, which allow patrons to travel between licensed establishments and consume their drinks on the street.

Special Event Permits are required for any events which will disrupt the flow of vehicular or pedestrian traffic. They are authorized by the Chief of Police after review from the city's police, fire & rescue, parking & transportation and traffic engineering departments.²⁸⁴ No fees are communicated online, although certain parks require deposits.²⁸⁵ This is in line with Hamilton's current permitting set-up in terms of qualifiers and how much information is readily shared online for prospective event organizers.

²⁸² Sound Diplomacy (2019)

²⁸³ McCarter (2017)

²⁸⁴ City of Huntsville (2021b)

²⁸⁵ City of Huntsville (2021c)

Huntsville Music Audit and Strategy

Huntsville's Music Audit discovered that the local music ecosystem is worth US\$139 million in economic output and supported 1,471 jobs worth US\$43 million in wages.²⁸⁶ Quantifying was the city's first step towards supporting and maximising its local music industry. There is currently no defined music tourism strategy in place, but the city's music strategy contains recommendations for expanding music tourism, including cross-industry promotion, more inclusive licensing and events and the introduction of a new mid-sized venue.²⁸⁷ Music is also tied into the city's general tourism strategy with allusions to culture, arts and events.

The announcement of the music plan hopes to bring with it more prominent music initiatives. The Rocket City, as it is known, previously boasted a handful of concert series and busking initiatives, but even the latter fell by the wayside over the years. While busking is legal in Huntsville, there is no formal policy in place for it. Performers do need a permit to sell any merchandise. Arts Huntsville, the city's arts council, sponsors busking in the Quigley Arts & Entertainment District, an open container area. Previous initiatives have included Busker Fridays downtown²⁸⁸, Pavement Performers at Bridge Street Town Centre²⁸⁹ and Buskerfest, a competition-style event which offers monetary prizes.²⁹⁰

Non-traditional Spaces

The city boasts a few alternative and non-traditional spaces for music, including markets and craft breweries (a growing local industry) and unique landmarks such as Three Caves, which plays host to concerts seating up to 750 people.²⁹¹ The Lowe Mill ARTS & Entertainment Complex, a former textile mill and now the largest privately-owned arts facility in the country, also houses art studios and multi-use creative spaces that are regularly used for live music programming.²⁹² Another unique repurposing of an old building is Campus No. 805, a multi-vendor development created from a former middle school. Live music is featured at several of the bars and breweries on site, and the campus hosts a summer series in the outdoor space.²⁹³ Arts Huntsville and the Parks and Recreation Department also coordinate Concerts in the Park, a free weekly presentation of live local music presented over 10 weeks throughout the summer.²⁹⁴

²⁸⁶ Sound Diplomacy (2019)

²⁸⁷ Sound Diplomacy (2019)

²⁸⁸ Busker Fridays (2018)

²⁸⁹ Bridge Street Town Centre (2018)

²⁹⁰ Arts Huntsville (2019)

²⁹¹ Huntsville/Madison County Convention & Visitors Bureau (2021)

²⁹² Lowe Mills ARTS & Entertainment (2021)

²⁹³ Campus 805 (2021)

²⁹⁴ Arts Huntsville (2021)

COVID-19

There are several relief initiatives operating in Huntsville, both fiscal and based around alternative resources. Arts Huntsville's Individual Artist Emergency Relief Grant Fund was a US\$40,000 funding pool (US\$15,000 of which came from community contributions) which gave artists across multiple creative disciplines grants between US\$200-\$250 to cover immediate expenses. Applicants had to be Madison County residents with at least three years working in the arts and at least 50% of their income derived from their artistic work. By the end of the initiative, 76 local artists had been awarded a total of 105 grants.²⁹⁵

In-kind resources include Purple 19's Live Streaming Assistance, in which community musicians and professionals share equipment and facilities to help homebound musicians create content for digital distribution,²⁹⁶ and Move Digital Group's free 45-minute business consultations that help small business owners and professionals with marketing and general operational queries.²⁹⁷

Lessons for Hamilton

Huntsville's Music Audit measured and quantified the value music brings to the local economy and benchmarked the city as being in a similar position to Hamilton, with strengths in the quality and variety of local music as well as affordability and struggles with funding, reputation as a music city (especially the shadows of nearby industry hubs such as Nashville and Atlanta), and access to industry professionals. Where Hamilton made its name forging steel for Canada, Huntsville has historically been associated with the United States' aerospace industry. Today, with each city growing, they are finding their footing in establishing themselves as creative communities in addition to their more well-known industries. Hamilton has been ahead of the curve compared to Huntsville, which is just launching its first strategy while Hamilton is moving forward with its second. A key takeaway from Huntsville's work, however, is the level of transparency and communication about budget allocation, progress and next steps. The city has also heavily involved both community members and industry stakeholders throughout the entire process to ensure their needs and priorities are fully understood and addressed.

²⁹⁵ Arts Huntsville (2020)

²⁹⁶ Purple 19 (n.d.)

²⁹⁷ Move Digital Group (2020)

3.5 Austin, TX

Leadership

Austin's Music Office, currently led by Director of Music Marketing Omar Lorenzo, sits under the umbrella of the Music & Entertainment Division of the city's Economic Development Department. The Music & Entertainment Division as a whole manages programming and funding to help grow and diversify the city's commercial and nonprofit music and entertainment industries, more specifically liaising with industry stakeholders to create jobs, increase pay, ensure a compatible nightlife, and promote talent export.²⁹⁸

There are several additional entities in Austin representing the local music industry, including the Music Commission (previously known as the Austin Music Commission), which advises the city council on issues affecting the local music industry, such as industry development and implementation of initiatives.²⁹⁹ Incorporated by the city in 2016, the Commission is composed of 11 board members chosen by the city council to serve four-year terms. Four officers (a chair, vice chair, parliamentarian and secretary) are elected via a board vote for up to four consecutive one-year terms.³⁰⁰ Austin Texas Musicians is a 501(c)4 nonprofit founded in 2008 that coordinates educational programming, professional development opportunities and mentorships.³⁰¹ Open to musicians living within 20 miles of city limits, it currently has over 4,300 members.³⁰² Finally, Black Fret, a prominent 501(c)3 which operates in many cities, is headquartered in Austin. It operates as a paid members scheme for music fans, utilizing membership dues to provide artists with unique performance opportunities, grants of up to US\$18,000 and an annual awards show. In order to receive their grants, artists must reach certain career milestones, such as content release, performances or community engagement.

³⁰³

Noise Ordinance and Red River Pilot Program

There is a maximum d(B)A of 85, although many factors come into play for interpreting this, including the time of day, proximity to residential units and the business license of the offending party. Amplified sound without a permit is only permitted to reach 75 d(B)A in residential areas between 10am-10pm (this is further restricted to an 8pm curfew on Sunday-Thursday unless granted Music Office approval). The city's entertainment districts maintain more liberal sound restrictions: The Warehouse or Sixth Street Districts permit up to 85 d(B)A between 10am-2am. Outside of those two districts, sound equipment may reach 85

²⁹⁸ City of Austin (2021a)

²⁹⁹ City of Austin (2021b)

³⁰⁰ City of Austin (2016)

³⁰¹ Visit Austin (2021a)

³⁰² Austin Texas Musicians (2021)

³⁰³ Black Fret (2021)

d(B)A or 70 d(B)A if coming from a restaurant (defined as having 51% food sales) 10am and anywhere between 10:30pm-midnight, depending on the day of the week.³⁰⁴

In January 2017, these noise limits were extended as part of a temporary pilot program in the Red River Cultural District, which has more restrictive noise ordinances than its entertainment district neighbours. Five venues were chosen to be permitted to emit noise until midnight on Thursdays (previously the curfew was 11pm) and 1am on Fridays and Saturdays (the previous curfew was midnight).³⁰⁵ The program showed that extended sound curfews increased revenue for venues and local musicians, reduced sound complaints and improved lines of communication between venue owners and their neighbours.³⁰⁶ The program's success led it to be extended until April 2018, after which the Austin Music Commission submitted a recommendation for permanent adoption to the city council, although no further action has been taken on this.

In terms of temporary sound permitting for events, the city maintains a consolidated list of links and considerations for event planners online,³⁰⁷ including a summarized flowchart depicting the application process from start to finish.³⁰⁸ Although no costs are depicted online, requirements and classifications for all event elements from amplified sound to food vendors and waste management are described in detail, providing event planners and promoters with a one-stop shop to organize and time their application.

Industry Initiatives

Austin has long been a leader in music industry initiatives, working to champion and promote the over 250 live music venues and 1,900 musical acts that make up a US\$1 billion local music economy.³⁰⁹ The city's reputation began when it branded itself as the "Live Musical Capital of the World," led by major industry events such as South by Southwest and Austin City Limits. Quantitative and development initiatives stemming from the Music Office include the Austin-Toronto Music Alliance, an almost 10-year-old partnership, which opens up exchange opportunities for artists in each member city, showcases and best practice sharing.³¹⁰ A music census was conducted in 2015 to create a benchmark for further action and measurements, including a 2016 economic impact analysis, a 2017 cultural asset mapping report, and amplified sound management recommendations.³¹¹

³⁰⁴ City of Austin (2021c)

³⁰⁵ City of Austin (2017a)

³⁰⁶ Austin 360 (2018)

³⁰⁷ City of Austin (2021d)

³⁰⁸ City of Austin (2021e)

³⁰⁹ Visit Austin (2021b)

³¹⁰ City of Austin (2021f)

³¹¹ City of Austin (2021g)

Promoting Local Artists

Much work is done to promote local artists and expand their performance opportunities. The Music Office maintains an online database of local musicians. Promoters, businesses or anyone else looking to hire local musicians can fill out a contact form with information on their budget, number of attendees, preferred genre, atmosphere, attire, provided equipment, and desired musician, if a particular one is known. Upon receiving the application, the Office will connect them with an appropriate act.³¹²

The city also introduced a six-month pilot program to pay buskers downtown. Supported by a US\$150,000 grant from local developer Trammell Crow, buskers received US\$150 for each four-hour performance.³¹³ In 2018, Austin City Limits and American Airlines signed a deal to make the show available as part of the airline's inflight entertainment catalogue, further expanding the show's viewership.³¹⁴ In a similar move, Austin musicians regularly play live shows at Austin-Bergstrom International Airport every weekday, while local music is played through the overhead speakers courtesy of local radio station KUTX 98.9.³¹⁵ Finally, every February is Love Austin Music Month, a collaboration between the City of Austin Music & Entertainment Division, the Austin Music Foundation and KUTX 98.9. It is filled with dedicated showcases and concerts, spotlights on black artists to incorporate Black History Month and educational programming on the city's music history via NPR.³¹⁶

Alternative Resources for Artists

The city maintains a list of educational and advisory resources to help artists and musicians navigate their careers and personal wellbeing.³¹⁷ Examples include:

- **Austin Music Foundation** - free online masterclasses and workshops, as well as ticketed virtual concerts showcasing local independent musicians.³¹⁸
- **SIMS Foundation** - mental health and substance abuse recovery support. Members receive large discounts with participating local providers, with copays operating on a sliding scale.³¹⁹
- **Health Alliance for Austin Musicians (HAAM)** - affordable healthcare with dental, vision, hearing and general wellness coverage. The organization also hosts periodic fundraising events, including a battle of the bands.³²⁰
- **Texas Accountants and Lawyers for the Arts** - although not Austin-specific, this state-wide initiative provides pro-bono legal and financial assistance for artists whose

³¹² Visit Austin (2021c)

³¹³ Powell (2018)

³¹⁴ Freeman (2018)

³¹⁵ Austin-Bergstrom International Airport (2021)

³¹⁶ KUTX (2021)

³¹⁷ City of Austin (2021h)

³¹⁸ Austin Music Foundation (2021)

³¹⁹ SIMS Foundation (2021)

³²⁰ Health Alliance for Austin Musicians (2021)

income is less than 300% of the federal poverty level. The organization also hosts educational seminars and workshops periodically to promote financial literacy.³²¹

- **Housing Opportunities for Musicians and Entertainers (HOME)** - provides small financial grants (US\$500) and referrals for musicians aged 55+ with 20 years of working history to help ease the burden of ensuring housing while in economic hardship.³²²

COVID-19

In 2020, the City of Austin created a US\$15 million Save Austin's Vital Economic Sectors (SAVES) emergency fund, pulled from the Financial Services Department Capital Budget, Building Services Department Capital Budget, Pay for Success Reserve Fund Operating Budget, and Austin Transportation Department Mobility Fund Operating Budget.³²³ Multiple creative industry and small business relief programs were derived from this and other donations, including:

- **Austin Creative Space Disaster Relief Program** - a total of US\$1 million was made available between the Economic Incentive Reserve Special Revenue Fund and the Economic Development Operating Fund to be distributed in grants of up to US\$50,000. Grants may be requested to help meet rent or complete facility work, and recipients are required to participate in community programs such as career development workshops with local schools.³²⁴
- **Austin Creative Worker Relief Grant** - this US\$3.5 million fund, organized by the city's Economic Development Department, provided grants of US\$2,000 to help local musicians with immediate costs such as rent, food and utilities. Applicants must have been able to prove two years of established work in the creative community. If the recipient already received funds from the Music Disaster Relief Fund, they were only eligible for half of the grant money. The city partnered with Texas Accountants and Lawyers for the Arts to assist prospective applicants with the process.³²⁵
- **Austin Music Disaster Relief Fund** - US\$1.5 million was set aside from the Live Music Fund (which was ordered to be replenished in accordance with the Relief Ordinance³²⁶ passed) to create grants of US\$1,000 for established artists (defined as having worked in the industry for two years and having six released singles or music videos). All grants were issued on a first-come-first-served basis.³²⁷
- **Austin Live Music Venue Preservation Fund** - this US\$5 million fund awarded grants of US\$20,000 to venues facing immediate risk of closure. Those who participated in a technical assistance evaluation were also eligible to receive regular monthly grants of US\$40,000 (with the total amount capped at US\$140,000). Applicants were required

³²¹ Texas Accountants and Lawyers for the Arts (2021a)

³²² Housing Opportunities for Musicians and Entertainers (2021)

³²³ City of Austin (2020a)

³²⁴ City of Austin (2020b)

³²⁵ City of Austin (2020c)

³²⁶ City of Austin (2020e)

³²⁷ City of Austin (2020d)

to submit a “Live Music Venue Equity Strategic Plan” outlining actionable items to be completed within the year. Examples include genre and performer diversity, professional development workshops and export programs.³²⁸

- **Austin Small Business Relief Grant** - this fund, created using federal pandemic relief funds,³²⁹ allocated a total of US\$16.5 million for small businesses to use towards their rent, payroll and other economic needs. Grants of up to US\$40,000 were issued to businesses with 25 or fewer employees and less than US\$5 million in annual revenue who scored highest on a matrix that took into account needs, vulnerability and equity.³³⁰
- **Austin Non-Profit Relief Grant** - similar to the above, this US\$8.75 million fund issued grants of up to US\$20,000 to qualifying nonprofits.³³¹

Metrics for each of these programs are available on the city website and outline details such as the applicant to recipient ratio, the demographics of applicants and how much has been awarded through each fund to date.³³²

Other programs include the Austin Creative Alliance’s Artist Emergency Relief Fund, which has raised US\$150,000 so far through donations from Facebook fundraisers, the Bill Wood Foundation, two anonymous donors and #alltogetheratx (a broader community fund organized by the Austin Community Foundation and United Way for Greater Austin which awarded over US\$7.7 million to 210 local nonprofits in need³³³). Over 250 applicants have received grants of up to US\$500 for verifiable lost income from gigs, contracts or commissions. Priority is given to ACA members as well as those with housing and grocery needs, and recipients are asked to participate in artistic community services in return.³³⁴

The Red River Cultural District’s Banding Together ATX initiative has distributed US\$225,000 to over 3,000 recipients in the music, music media, event production and hospitality industries, and is currently fundraising for another round of applications. Recipients are awarded US\$100 grocery gift cards to address immediate needs.³³⁵

In addition to financial support, the city maintains a list of resources available to artists, from music-specific initiatives to general small business support services, housing and eviction assistance and affordable healthcare access. Many of these services are year round, such as those listed in the previous section.³³⁶

³²⁸ City of Austin (2020f)

³²⁹ City of Austin (2020h)

³³⁰ City of Austin (2020g)

³³¹ City of Austin (2020i)

³³² City of Austin (2021i)

³³³ Austin Community Foundation and United Way for Greater Austin (2021)

³³⁴ Austin Creative Alliance (2021)

³³⁵ Red River Cultural District (2021)

³³⁶ City of Austin (2021h)

Lessons for Hamilton

Austin has been fostering its music industry leadership for many years at a city level, with additional support at a state level through the Texas Music Office, itself a uniquely involved entity. The city has firmly established itself as a global leader in music city strategy, a statement supported by the sheer amount of information on initiatives, events and funds available for participation of local artists and professionals. It is important to consider, however, that Austin also boasts industry centerpieces such as South by Southwest and Austin City Limits, and its level of music city policy is vital to protecting the year-round industry that helps maintain its reputation and lead up to such large-scale programs. This amount of city-led involvement may not be feasible or even necessary for a city the size of Hamilton, but should rather be looked at as a best practice example and guide for growth, with many examples of mistakes in Austin that Hamilton should avoid related to affordability.

The city is facing rapid growth across several industries (many Fortune 500 companies call the city home, including Amazon, Apple, and Tesla's SpaceX venture), making it increasingly unaffordable for the artists that have defined its brand. In order to gain feedback from artists and creative organizations on their living and working needs, the city conducts a periodic Creative Space Survey. Results show respondents seek small and mid-sized spaces to grow, and more than half of artists are considering leaving the city due to the high cost of living.³³⁷ The city itself has not announced any response strategies to date, although the 2020 survey is open for submissions. There are a few targeted housing options available for artists. The Metropolis combines living quarters with creative spaces, house concerts and an outdoor stage,³³⁸ while Bluebonnet Studios, a general low-income housing development, is open to members of HAAM (Health Alliance for Austin Musicians) via a partnership with local affordable housing organization Foundation Communities, so long as musicians meet the income requirements.³³⁹ Lack of affordable spaces is something Hamilton can take proactive steps to avoid, for example by ensuring affordable housing and creative spaces for artists and businesses as well as organizing incentive programs to attract new music businesses while retaining any that are locally grown.

One important takeaway from Austin's brand is just that: its moniker as the 'Live Music Capital of the World' is a title Austin came up with itself to drive promotional work, and sets a strong example for self-branding to build tourism and reputation. It is a great example of using a 'build it and they will come' attitude to begin attracting and retaining artists while adjusting resources and initiatives to create a compound interest effect on the city's reputation. Additionally, Austin monitors the value and needs of their music industry periodically through its surveys (such as the Creative Spaces Survey) and funding allocation data publications. This level of engagement and tracking really helps a city stay on top of its initiatives and

³³⁷ City of Austin (2017b)

³³⁸ Metropolis Apartments (2020)

³³⁹ Widner (2016)

reprioritize their attention to the changing needs of their local music industry as effects begin to show.

4.1 Actions and Recommendations

Hamilton Music Strategy: Where We Are Now

Looking at the specific actionable items set forth in Hamilton's 2015 music strategy, it is clear that the city has made great strides in achieving its goals. Only a handful more specific action items remain to be fulfilled, including:

- Examine the feasibility of 'twinning' Hamilton with another major music city
- Seek funding and alignment opportunities for Hamilton within the Ontario Live Music Strategy
- Provide Hamilton representation to the Ontario Music Strategy Industry Working Group
- Assess the resources needed to participate in the proposed provincial music portal and provide content as appropriate
- Bid to host significant music industry events e.g., JUNO Awards
- Support, participate in, and grow local to national recognition and celebration initiatives e.g., Hamilton Music Awards, City of Hamilton Arts Awards, Hamilton Tourism Awards, JUNOs
- Link with City of Hamilton Culture Plan asset-based initiatives e.g., storytelling project, asset mapping and Love your City

Due to the specificity of these actions, they will not be elaborated on within this report and will be left as achievable goals from the original music strategy. However, in addition to these, the 2015 strategy outlined some broader action items within which several smaller initiatives could fall, including:

- A. Facilitate and promote youth contact with and placements in the music industry
- B. Produce new opportunities for music experiences
- C. As part of a potential local branding initiative, identify mechanisms and tactics for promoting defined aspects of the local music scene e.g., local musicians, businesses, performances, events and festivals
- D. Identify and examine City bylaws and regulations that are barriers to the local music industry and mitigate where possible
- E. Align with other key City policies, plans and initiatives e.g., culture plan, events strategy
- F. Review options for the industry and/or musicians to formally organize e.g., advisory Music Commission, council, industry association, artist co-operative and network (e.g., Seattle, Washington)
- G. Provide input into the review and Development of municipal arts funding models e.g., City of Hamilton's Arts Investment Strategy and Community Partnership Program (CPP) review
- H. Conduct and share research on local music industry (e.g., economic impact, workforce and market)
- I. Link small music business and entrepreneurs to available services such as the City of Hamilton's Small Business Enterprise Centre and cultural service organizations
- J. Identify and communicate business opportunities for the music industry (local and export)
- K. Develop a music-based brand and brand strategy (and marketing plan) for Hamilton Music Strategy
- L. Create and/or participate in provincial, regional and local cultural tourism product development and promotion related to music
- M. Adopt a broad and inclusive approach to music with consideration to genre, cultural diversity, and levels of competency in the Music Strategy and its implementation
- N. Identify key music districts in Hamilton for branding, destination marketing and business development
- O. Develop or facilitate the creation of diverse venues for live music
- P. Advocate to, and work with, education providers to expand lifelong music education opportunities
- Q. Coordinate strategic efforts to develop the music industry with neighbouring municipalities

The recommendations laid out in this chapter will build on the above 'general' goals by providing more itemized next steps for Hamilton. Moving forward, the city aims to continue

focusing on the key areas of City Policy and Supportive Infrastructure; Talent and Professional Development; and Music Tourism and Branding. Due to the immediacy of the situation, an additional category has been created to identify funding-themed recovery items in relation to the COVID-19 pandemic. Although prioritized in order to guide the local music industry through the economic shutdown and slow return to audience-based events, the initiatives will continue to serve the needs of the music community long into the future and provide a great complement to the full list of recommendations, both original and updated, provided across both strategies. The recommendations made in this section should serve as a rubric for relevant city departments to advocate for, create, support, and/or adjust existing and future practices, which will ultimately lead to a thriving music economy.

4.1 City Policy and Supportive Infrastructure

Recommendation 1: Investigate/Define the Role of a Music Officer Position

Timeline: Short-term (0-12 months)

While Hamilton's Creative Industries and Cultural Development includes a Music Advisory Team, there is no figurehead such as a Music Officer to serve as a full-time, public-facing representative of the music industry. A Music Officer will bridge the gap between the industry and the city at a policy level and lead the delegation of action items and Office initiatives. The Music Officer's role is expansive and the person chosen will become the ultimate point of contact for all music-related activity.

The Music Officer's job is to design supportive music policies, identify and promote opportunities for the local music industry and strengthen the network among local musicians as well as between local, provincial, national and international musicians. It does so by sitting in on city council meetings as a cultural representative, attending industry conferences and networking opportunities around the nation (if not globally) and coordinating regular site visits and outreach activities to connect with local music industry stakeholders and discuss their needs. The Music Officer is also responsible for advising the broader music ecosystem on access to resources, meeting with other sectors like Film and Tech to develop and coordinate opportunities for collaboration, develop national and international contacts, and help build and maintain a publicly accessible database of local industry contacts, resources, and event calendars.

Many of the Music Officer's tasks are currently fulfilled by City staff. However, in creating a defined role for this, there are a few structural specifications that must be considered, including:

- Salary: determined by city³⁴⁰
- Contract term: 1 year, full time (extendable)
- Hiring body: City of Hamilton
- Skills and background needed:
 - Proven leadership
 - Experience serving in a political role, with extensive knowledge of local, provincial and national ordinances, licensing procedures, regulatory systems and grant opportunities.
 - Experience serving in a music-industry role (including international experience in order to successfully ascertain best practice examples)
 - Extensive experience working with the local community, such as by leading outreach programmes or youth education programmes

All contact information for the music officer should be made available on the city's Music in Hamilton webpage.

HUNTSVILLE MUSIC OFFICER JOB DESCRIPTION - Huntsville, AL

What Is It: Huntsville's Music Officer will be the primary point of support for the city's music industry. They will coordinate between city representatives at a municipal level and music industry stakeholders at professional and grassroots levels, ensuring the city's bylaws and initiatives support the music industry wherever they intersect. The Music Officer seeks to fulfill five main goals:

1. Be an ambassador for Huntsville's music industry locally and within external markets
2. Promote music as a cultural driver that improves local quality of life and an economic driver that attracts tourism
3. Work to ensure diversity and growth within the music economy across all neighbourhoods and industry subsectors, and coordinate with communities, industry professionals and audiences alike to understand and address their needs
4. Serve as the middleman between industry professional and city representatives to create a safe, welcoming and diverse music industry that is affordable and sustainable for music businesses, particularly small businesses
5. Promote the local music industry to tourists, investors, entrepreneurs, future residents and creatives

³⁴⁰ A salary of CAD\$75,000- \$90,000 would be in line with the base salary for other council members, as reported. This does not take into consideration bonuses and stipends issued for travel costs or various appearances.

The Music Officer will carry out several responsibilities as part of their day-to-day job, including:

1. Implementing and tracking the actionable items listed in Huntsville's music economy and strategy.
2. Coordinating with the Mayor's Office and its various departments (Economic Development, Urban Development, Transportation etc.), as well as city authorities and emergency services to carry out said actionable items and adjust strategies according to the changing needs of the industry.
3. Commissioning and managing consistent data collection on Huntsville's music industry to track figures on its economic and social impact, related crime rates, alcohol and licensing stats (such as number of licenses issued, fines or noise complaints) and tourism figures.
4. Holding meetings with local or visiting stakeholders, including business owners, city department leaders, emergency services leaders and investors.
5. Fulfilling public engagements such as giving speeches or attending press conferences or industry conferences, in order to represent and advocate for Huntsville as a music city.
6. Managing the implementation of the Music City Policy Handbook.
7. Working with city and emergency authorities to adjust or introduce permitting and licensing bylaws which support the music industry as a cultural, economic and social contributor.
8. Attending city council meetings.
9. Exhibiting sound political judgement and submitting high-quality political writing.

Who is responsible: Huntsville Mayor's Office, carried out as part of its Music Initiative, with guidance from Sound Diplomacy.

What has it done: This is in the process of being set up and appointed.

Lesson for Hamilton: A Music Officer builds on the responsibilities and goals of the Hamilton Music Advisory Team by formally adopting the role of the chair into a full-time, integrated position within municipal staff. In this capacity, the Music Officer acts as a point of contact, event coordinator, resource guide, and collaborator for people at all corners of the sector and beyond. Transitioning this to a full-time, public-facing position introduces a more clear figurehead for stakeholders to approach and creates a built-in advocate and marketing agent for public-facing activities, such as conferences. A Music Officer is the representative of the city's

music industry both locally and abroad as they promote initiatives, build their network, and exchange best practices.

Recommendation 2: Review Music in Hamilton Webpage

Timeline: Short-term (0-12 months)

Websites are one of the most accessible resources in a music ecosystem. They have the potential to make finding connections, businesses, and entertainment seamless, in turn driving traffic to underutilized resources and cultivating community. Hamilton is ahead of the curve in this aspect, having already developed the Music in Hamilton webpage, which lists musician-friendly policies, funding resources, a database of musicians, and a list of venues. A few additional features could make it even more valuable, such as:

- A public calendar of events to list performances happening around Hamilton
 - Submittal instructions could include the time, date, location, and cost of the event to an email or google form and should be placed in a prominent position on the landing page. The calendar should be regularly updated.
 - How often the calendar will be updated should also be incorporated, so that interested parties know when to send new events or updated details.
- Links to licensing and permit forms
 - While there is information about musician-friendly policies, links to relevant forms and processes are not readily available on the Music in Hamilton webpage.
 - Policy information should also be condensed and summarized, so that it's simple for everyone to understand such as using a flowchart or infographic.
- A directory or database that consolidates information on all music-related businesses and entities in Hamilton
 - The current Music in Hamilton webpage lists these separately, adding a finding aid, such as a directory, where everything is listed makes it easier for site-visitors to find the information that they need.

The webpage should be managed and regularly updated by the Music Officer, or another relevant agency, who will keep track of new or changing resources across Hamilton's music ecosystem.

LONDON MUSIC OFFICE WEBSITE - London, ON

What Is It: London's Music Office website is a hub of information and resources, including a full list of funding sources both regional and national; an events calendar; a directory of music businesses; additional regional, national and minority-specific awards programs which local artists may be eligible for; industry news updates and a map of poster board locations throughout the city which can be utilized to promote upcoming events and releases. All relevant city regulations and links are available for reference. Additionally, there are several guides published on the website. Although they are not exhaustive resources, they provide a summary of considerations as well as links to each relevant item for further information. Topics include opening a live music venue,³⁴¹ obtaining a temporary sound permit for patios or events³⁴² and promoting good neighbour habits between surrounding businesses and residences in regards to patron behaviour and noise control.³⁴³

Who is responsible: City of London

What has it done: London's Music Office website makes it easy for artists, business proprietors, and enthusiasts to quickly find relevant information. City policy and regulation information has been extracted and condensed to make them easier to comprehend, 150+ music businesses are included in its directory, and the calendar of events features over 70 virtual and physical music performances occurring throughout the year.

Lesson for Hamilton: London's Music Office website is a one-stop shop for important information regarding the music industry. Adding a business directory, calendar of events, condensing policy information, and providing links to license and permit forms makes it simple for all music industry personnel to find what they need in one central location.

Recommendation 3: Conduct Periodic Audits of the Local Industry

Timeline: Medium-term (1-2 years)

Hamilton's music industry needs to be periodically and comprehensively measured and evaluated in order to identify and analyse any trends, areas of growth and overall

³⁴¹ Service London (2021a)

³⁴² Service London (2021b)

³⁴³ City of London (2021b)

performance, as well as the implementation of the actions that conform this strategy. The appointed Music Officer, under the purview of Creative Industries and Cultural Development, would be responsible for spearheading this initiative, which involves developing, dispensing, and evaluating a survey, while ensuring that the results are made publicly accessible through a sector-wide database. Ideally, this biannual or quadrennial census should measure the following areas of the music industry:

- Number of local music businesses, divided by category
- Number of locations which feature live music, divided by primary business purpose
- Number of temporary entertainment licenses issued by the city
- Number of noise complaints/citations issued by the city
- Employment figures, including salaries and benefits
- Artist income figures, divided by subsector (streams, performances, merch, other)
- Audience consumption trends
- Audience and music industry professional demographics and profiles
- Indirect, direct and induced economic impact of the local music industry

The Music Officer should work in collaboration with key stakeholders to determine the content of the survey and make sure that it is effectively promoted and disseminated across Hamilton to glean the best results. After a representative amount of responses have accrued, the Music Officer should collate the results into a report to be presented at one of their regular sector meetings. If routinely executed, surveys and focus groups can provide estimations and predict areas of growth or those in need of additional attention between census years.

MELBOURNE LIVE MUSIC CENSUS - Melbourne, Australia

What Is It: In 2012, Music Victoria, a non-profit organization that serves as the representative body for the state's contemporary music industry, undertook a live music census to measure the participation figures and economic impact of the city's live music industry. It was discovered that over 90,000 live performances took place across the city each year, and the live industry supported 110,000 fte jobs and generated AUD\$1 billion on an annual basis.³⁴⁴ A follow-up census was conducted in 2017 to update the figures. Volunteer students attended shows at venues across the city to observe who was playing, working and enjoying. A city-wide survey for both professionals and audience members complemented these initial observations. The results showed a 12% audience increase across the city, but noted shortcomings in musician income, primarily that musicians were being paid the same as they were 25

³⁴⁴ Progressive Broadcasting Service Cooperative Ltd. (2018)

years ago despite a 4% annual increase in incomes across all industries during that same period.³⁴⁵

Who is responsible: Music Victoria, The City of Melbourne, City of Yarra, City of Port Phillip and the students from COLLARTS and RMIT.

What has it done: The findings of the 2012 census helped lobby both local and state governments to invest further into the live music industry³⁴⁶ and inspired other cities around the world to conduct similar studies.³⁴⁷ Meanwhile, the 2017 update calculated Melbourne to have more live music venues per capita than any other city in the world, allowing it to promote itself as the Live Music Capital of the World.³⁴⁸ The census also helped inform the Melbourne Music Plan 2018-2021, which included a priority to create a comprehensive heritage study of the city's music venues and increased promotional work.³⁴⁹

Lesson for Hamilton: A census serves two primary purposes: it helps measure the local industry to better inform strategic decisions (such as the recommendations listed in this strategy) and it helps assign value to the music industry in a medium governments and private entities are more likely to invest in. While a full census is too extensive to be conducted each year, Melbourne had the right idea of waiting 5 years before reassessing to identify how to adjust its support efforts.

Recommendation 4: Advocate for Friendlier Noise and Alcohol Ordinances

Timeline: Medium-term (1-2 years)

Hamilton enforces blanket noise laws rather than zone-based differentiations. This presents a missed opportunity to introduce more lenient restrictions in commercial areas, where ambient noise levels are maintained later into the night and there are fewer residential expectations. It should be written into local ordinance that sound is to be measured in relation to ambient noise rather than just a flat dB(A) number, and a formal system of measurement must be written to outline instruments, timeframe and the process between warning and citation. This ensures both venues and city are on the same page.

³⁴⁵ Music Victoria (2017)

³⁴⁶ Progressive Broadcasting Service Cooperative Ltd. (2018)

³⁴⁷ Newton (2018)

³⁴⁸ Donoghue, Paul (2018)

³⁴⁹ Live Music Office (2018)

Additionally, the Alcohol and Gaming Commission of Ontario sets provincial alcohol sales curfews for licensed establishments at 2am on Monday - Sunday³⁵⁰, leaving a two-hour window between the cessation of performances and last call. As many music venues, whether they operate as dedicated venues or bars/restaurants that host live music, derive a large portion of their income from alcohol sales, Creative and Cultural Development, the Music Officer and HMAT should collaborate with key stakeholders in complementary industries and similar offices province-wide to advocate for more cohesion between the two activities. Advocacy in this case could start by developing surveys and roundtables that allow stakeholders to voice their concerns and recommendations on current noise and alcohol ordinances. This gives them a voice while giving advocates data to support their calls for change and has the added impact of bringing members of the music industry, night time economy, and relevant government officials throughout Ontario together behind a common goal, strengthening alliances and chances for future partnerships. Extending permitting hours is a key way to recognize music as an economic driver, expand performance opportunities for arts and increase revenue for local venues. Pilot programmes in cities such as Austin and Amsterdam have shown that extended hours actually increase bar sales, ticket sales, staff salaries, artist salaries and performance opportunities, all without negatively impacting surrounding communities.³⁵¹

REMBRANDTPLEIN'S 24-HOUR LICENSING - Amsterdam, Netherlands

What Is It: In 2015, Amsterdam's then-mayor Eberhard van der Laan launched a pilot scheme in the hopes of reducing alcohol-related violence and creating a safer and more welcoming night time environment within Rembrandtplein, a bar-filled square in the city centre which saw up to 200 incidents of violence or nuisance reports each year.³⁵² The pilot programme introduced 'square hosts' to patrol the area on Fridays and Saturdays, serving as both information sources and safety promoters. By utilizing civilian 'hosts' over city police, the patrols were not perceived as potential aggressors by inebriated patrons. Additionally, clubs and bars within the square were also permitted 24-hours operational licenses, previously only available to existing or empty spaces located outside the city center.³⁵³ These licenses are rarely issued: in order to obtain one, establishments must prove they will have a positive effect on the city's nightlife.³⁵⁴

Who is responsible: The city's Mayor's Office, alongside city police and the hospitality industry in the surrounding area of the square.

³⁵⁰ Alcohol and Gaming Commission of Ontario (2021)

³⁵¹ Austin City Council (2018)

³⁵² Seijas and Gelders (2019)

³⁵³ Koren (2018)

³⁵⁴ Coggins (2016)

What has it done: The pilot programme sought to overcome the noise and chaos that accompanied the pushing out of patrons at closure. By the end of the scheme, nuisance reports had dropped 40% and reports of violence had dropped 20%.³⁵⁵ The city also noticed a more even distribution of club-goers across the city, as well as a broader range of ages represented, theorizing that those in their 30s are more likely to go out if they feel they'll get their money's worth by having access to activities for longer.³⁵⁶

Lesson for Hamilton: Hamilton's Entertainment District development creates an opportunity for innovative and supportive licensing that creates a welcoming and safe environment for both patrons and businesses. Expanding licensing allows for a more diverse night time offer and gives businesses the option to stay open longer and thus generate more income if it makes sense for them to do so.

Recommendation 5: Review Agent of Change Policy

Timeline: Medium-term (1-2 years)

As Hamilton's population continues to grow, there will inevitably be increased noise complaints as previously commercial-heavy areas begin to introduce more residential units. While Hamilton has a policy in place similar to Agent of Change, it is not publicly accessible, which could breed confusion between city officials and business owners concerning proper protocol regarding noise complaints and associated fines. When this becomes a pattern, it creates a ripple effect throughout the entire industry by depriving artists of a space in which to hone their craft and build their audience. Current enforcement tactics are vague and primarily center around a tier of fines that are crippling for small businesses.

Agent of Change is a concept first introduced in the Australian state of Victoria, although many cities around the world have since adopted it. It allows existing venues to maintain their noise levels regardless of any new developments around their premises and, to further this, requires new developers to shoulder the responsibility of noise attenuation, either by sound proofing the new building or paying to increase soundproofing at the venue. If no sound attenuation measures are taken, developers must know that the city will take no action to order the closure of a nearby venue due to existing noise levels. Although this amendment is presented here as protecting existing venues against new residential developments for ease of language, it is important to emphasize that Agent of Change operates in the reverse as

³⁵⁵ Broer, van der West and Flight (2018)

³⁵⁶ Koren (2018)

well, and will protect existing residential or mixed-use buildings from noise changes brought about by a new venue.

Agent of Change should be automatically triggered when a planning application is submitted to Hamilton involving a site within 10m of an existing venue or a venue being within 10m of a residential or mixed-use zone. All planning applications should include a noise attenuation plan, and recognition must trickle down to future tenants of a development by making them sign a declaration of acknowledgement for the nearby venue and the use of Agent of Change throughout Hamilton should be tracked. The city can maintain a list of which units have triggered the bill as well as a map of noise complaints throughout the city to help identify gaps in use which may need to be expanded.

In addition to making the current policy publicly and easily accessible, Hamilton should implement a 'Warn and Address' system to address valid noise infractions. A 'Warn and Address' system where venues against which noise complaints have been made are issued a first warning and given a chance to address any structural or operational issues which may be contributing to the noise gives venues more time to shift their practices. Officials may return at a later date to ensure the changes have gone into effect. Fines should begin at a smaller figure, such as \$500, and Agent of Change should be written into local ordinance.

AGENT OF CHANGE - Austin, US

What Is It: In 2016, Austin's Mayor Steve Adlin began advocating for Agent of Change through his Omnibus Resolution, which looks at ways to support the local music and arts industries in a growing and increasingly expensive local economy. Spurred on by noise complaints against the Nook nightclub from the newly-constructed Westin, there was strong support across the city to implement the protective measure.³⁵⁷

Who is responsible: The City of Austin Economic Development Department

What has it done: In 2016, execution was left to the city's Economic Development Department, but the measure was unsuccessful due to a few oversights within the text, namely the exclusion of hotels from requirements, no method of enforcement and the sporadic or singular application of the law to specific license types.³⁵⁸ 2017's Red River Pilot Programme showed how extended hours helped increase sales for

³⁵⁷ Curtin (2018)

³⁵⁸ Curtin (2018)

local venues without negatively impacting the surrounding neighbourhood, so the initiative was revisited in 2018, and Austin met with Toronto, San Francisco and Brisbane to discuss best practices.³⁵⁹ The updated recommendation, presented to the city in 2018, requires residential property developers and building managers to disclose to residents if the building is near a music venue, enforces a mitigation threshold of 45 dB(A) and withholding occupancy certifications until soundproofing standards are met. While the policy has yet to be adopted, the Economic Development Department published its next steps in June 2019, which included:

1. Commission an acoustic engineering study, and begin testing sound mitigation techniques to determine the best tools and strategies.
2. Identify and implement sound monitoring techniques across the city to regularly collect data.
3. Create a communications network across all city departments and authorities involved in enforcing Agent of Change or responding to noise complaints.
4. Maximise the Creative Space Assistance Programme to provide financial relief for venues at risk of closure due to noise complaints, and utilize it as a framework to introduce a Sound Mitigation Assistance Programme to help with the cost of soundproofing.
5. Conduct more community and industry outreach to gain feedback throughout the process and educate stakeholders on the implementation and effects of Agent of Change.
6. Revise the Sound Ordinance based on the findings of the acoustic engineering study and the industry outreach, and draft and incorporate Agent of Change language into the ordinance.³⁶⁰

Lesson for Hamilton: Successfully adopting Agent of Change into local law requires a lot of coordination among city departments, community outreach to business owners and residents and communication with affected parties as new strategies begin to be implemented. By taking proactive steps to introduce such a measure now, Hamilton can prepare itself for any issues which may arise in the future, particularly as the city grows and new residents are integrated into the community.

Recommendation 6: Enforce City-Wide Artist Compensation Policy

Timeline: Short-term (0-12 months)

³⁵⁹ Swiatecki (2018)

³⁶⁰ City of Austin Economic Development Department (2019)

Musicians, especially at a grassroots level, struggle with receiving fair pay for their performances. One of the most common phrasings of musicians being asked to perform for free is to perform for ‘exposure’, and while each performance is an opportunity to gain new fans and grow an audience, it’s also important to recognize the contribution their music makes to the business environment around them, be it a restaurant, festival or something else. Much time has gone into honing their skill for it to be ready for the performance, memorizing songs and purchasing lessons or equipment. If musicians are not fairly compensated for the resulting output, they will be continuously forced to commit to day jobs in order to pay their bills, taking further time away from their music. The city has been proactive in setting an example of fair pay standards by enforcing a policy for city-hosted and city-funded events, but more needs to be done to promote fair pay across all the private and independent sectors as well.

As part of this, Hamilton can implement a city-wide fair pay policy, complete with a signable pledge, which emphasizes the value musicians contribute to the city’s cultural fabric and the role they play in the broader economy. Many musicians are in a position where they are unable to negotiate fair pay for fear of losing the opportunity to a musician who *is* willing and able to perform for free. By intervening at a policy level, the city evens the playing field for all musicians and ensures everyone is equally and fairly compensated. Incentives such as grants towards event costs or tax breaks can also sweeten the pot for businesses or promoters looking to hire artists to contribute to their event. Pledges should be distributed across all live music sources identified in the venue mapping and required of all event planning applications. The following is an example:

Our establishment values music as a key contributor to Hamilton’s culture and economy, and we therefore vow to fairly and competitively compensate all artists for the services they provide to our operations. Artists are working professionals, and we hereby commit to promoting them to the best of our abilities within their desired rates. In doing so, we hope to set an example of transparency and support among organizations, declaring that artists must be paid for their time.

PAYING THE ARTIST – Nationwide, Ireland³⁶¹

What Is It: In 2020, Ireland’s Arts Council launched its Paying the Artist scheme, which aims to help artists make ambitious and high-quality art by ensuring they are fairly remunerated. The policy is underlined by key principles, including:

1. The value of artists must be reflected in their compensation.
2. Remuneration should be driven by best practice rather than minimum standards.
3. A healthy and diverse music ecosystem depends on how easy it is for artists to maintain viable careers.
4. Underpaid or unpaid work from artists makes up an entire hidden subsector of the cultural economy.
5. In instances of public funding, fair pay should be a prioritized and budgeted item, rather than budget-dependent.

In light of these principles, the Arts Council sets forth the following best practice items for organizations that engage with artists:

1. Have a publicly accessible remuneration approach on their website.
2. Be transparent and upfront with artists when discussing pay, including the nature of the employment (temporary vs part-time vs contracted), any benefits attached to it and the difference between fees, expenses and per diems.
3. Keep up to date with industry standard rates set by industry organisations and advocacy groups.
4. Cover all artist engagements with a contract that details the full scope of the artist’s work.
5. Allow artists the leverage to negotiate the terms of their contracts.
6. Be transparent about how and when artists will receive their pay.
7. Directly budget for artist fees so they are not affected by any overspending or subsequent budget cuts.
8. Respect artist copyright, both morally and economically.

In instances where artists are not paid, organizations must be clear about why artists are not being paid, argue for a clear and genuine benefit that the engagement will bring, ensure artists are aware of the scope of their contributions and are not asked to do anything beyond the initial terms of engagement or beyond their skills and ensure that unpaid or volunteer opportunities are not promoted in lieu of reasonably staffed positions. In cases where there is no valid reason for unpaid artists, failure to to comply with policy results in lack of access to city funding moving forward.

³⁶¹ The Arts Council (2020)

Who is responsible: The Arts Council, the Irish national agency for funding, developing and promoting arts across all disciplines.

What has it done: The Arts Council drafted a two-year implementation plan to be carried out across 2020-2022, outlining the action items, desired outcomes, measurable deliverables and expected timeline across four categories:

- Research
 - Commission ongoing research into artist pay
 - Review changing practices around artist pay and contracts
 - Work with the Irish Research Council to conduct more research into the living and working conditions of artists
- Development
 - Work with industry organizations and advocacy groups to create toolkits, contract templates and pay scale suggestions
 - Work with organisations and business to promote best practices and help them develop their own policies
 - Include artist remuneration focuses within support programmes for training and development initiatives
 - Identify and address sector-specific needs through artform policies
- Funding
 - Publish clear expectations of artist remuneration for funding applicants
 - Include artist pay as an assessment category for applications
 - Audit artist pay data through-out the grant management process to ensure consistency
 - Monitor the commitments and expectations established in funding arrangements
 - Maintain data on overall artist investment within the Arts Council
 - Continuously review artist-specific funding programmes to ensure they are up to date with new remuneration standards
- Advocacy
 - Include artist pay policy within public-facing and industry-facing advocacy campaigns
 - Work with government, institutional and agency organizations to ensure they are adopting best practice policies
 - Monitor any changes in public policy that may affect artist pay practices

Lesson for Hamilton: Advocacy is a great foundational measure to take to begin supporting fair pay for artists, but more integrated action items will drive a more successful, sustainable and transparent approach from advocacy groups and hiring organizations alike. It is not enough to create a promotional campaign. Results must be monitored and adjusted to ensure businesses are keeping up with industry standards and artists are not being undercut in the name of competition. This will require coordination and communication across several sectors, from industry stakeholders such as artists themselves to advocacy groups such as Hamilton Arts Council and BIAs.

Recommendation 7: Promote the City's Busking Policy

Timeline: Short-term (0-12 months)

Street performances greatly contribute to the atmosphere of a city, creating a welcoming and familiar environment in which passers by may enjoy free music and artists may enjoy performance opportunities. Though Hamilton has a busking policy, it requires additional promotion and educational outreach as the affected population is not necessarily aware of its terms or conditions.³⁶² To rectify this, the city must educate the public on their busking policy, the Organized Street Buskers Program.³⁶³

The 2010 recommendation for the Organized Street Buskers Program is currently posted on the Music in Hamilton section of the city's website, but a final version of the policy would help to show that the policy has officially passed and could be better utilized as a tool for education and awareness about the policy in place of the Organized Street Buskers Program recommendation. In addition, it is recommended that the policy should be widely promoted on Music in Hamilton social media channels, disseminated to local law enforcement officials, and posted in public areas often frequented by buskers.

³⁶² Priel (2011)

³⁶³ Priel (2010b)

STREET PERFORMERS BYE-LAWS - Dublin, Ireland³⁶⁴

What Is It: In 2016, the City of Dublin amended its street performance bylaws to require permits, ban backing tracks citywide, ban amplification in certain areas and regulate performance schedules. Under the new bylaws:

- Street performers must hold a performance permit, which costs EUR€30 per year. Visitors (such as foreign travelers) may obtain a visitor permit for EUR€10, which grants them two weeks of permitted busking, renewable once per calendar year.
- If the act is using amplification, the cost will be an additional €60 per year for the standard permit and €20 per visitor permit.
- Performances are permitted between 9am-11pm in one or two hour blocks which must start and stop on the hour. Afterwards, their next performance location must be at least 100m away.
- Performers can not set up within 50m of another performer or within 3m of any business entrance or residential unit
- Sound is limited to 80 dB(A), or 75 dB(A) in Temple Bar.
- Performers must immediately stop performing if their crowd becomes so big that it's blocking the street.
- The artist's setlist cannot repeat itself within 30 minutes.

Although the sale of merchandise is not covered under a street performer permit, artists may obtain an additional Casual Trading License at a cost of €100 per year.³⁶⁵

Who is responsible: Dublin City Council

What has it done: Although buskers were initially skeptical of some of the new regulations, particularly those regarding amplification and backing tracks, they have since said that the new policies have led to fewer arguments between buskers and a better sense of community. City data has also shown increased compliance, with a 66% drop in warning notices and a 70% drop in fines.³⁶⁶

Lesson for Hamilton: Busking is a great placemaking device, creating a vibrant environment for visitors while also opening up income streams for artists and allowing them to hone their public performance skills. Hamilton already has its busking strategy mapped out, but has not promoted it widely. By creating a clear path to permission for artists through promotion, awareness, and education, the city can help ensure that its street performers are performing in appropriate locations,

³⁶⁴ Dublin City Council (2016)

³⁶⁵ Dublin City Council (2021)

³⁶⁶ Kilraine (2020)

opportunities are dispersed fairly between performers and passersby are treated to high-quality acts representative of Hamilton's music scene.

Recommendation 8: Maximize Spaces around the City

Timeline: Medium-term (1-2 years)

Temporary permitting for non-dedicated spaces serves a three-fold purpose: (1) maximizing underutilized spaces around the city to lower costs while promoting sustainability (2) increasing opportunities not only for performers but also for the support crew that it takes to organize and put on a show and (3) providing venue space for performers with a mid-level capacity, who otherwise may seek locations in surrounding cities. The use of dormant or unique spaces will require increased involvement from the municipal government and city authorities to maintain the safety of the proposed units and coordinate transport connections, but the city can keep a registry online of certified usable venues for event organizers to apply to use. Applications should maintain some stipulations on event operations, including requiring an operational safety plan, security strategy, environmental sustainability and waste plan and more standard event permit application addendums. In keeping with Recommendation 5 all applications must also sign an artist compensation pledge to ensure fair and equal pay.

There are unlimited ways to utilize these spaces, from live performances to release parties or rehearsal spaces. Permits should stipulate that audience-driven events will be permitted for all-ages attendance in order to strengthen the connection among the music community, increase opportunities for young artists to perform locally and tap into the younger generation of fans, which often lead trends by serving as tastemakers via the latest social media and consumption trends.

Local stakeholders identified a need for mid-sized venues to help meet demand between small venues or multi-use spaces that can accommodate 50-150 people and large stadiums of 1,000 seats or more. The ideal venue size needed was noted to be between a capacity of 200-1000. It was also noted this gap may be due, in part, to the city's proximity to Toronto where there is already more diversity of venue sizes, and could be contributing to bands choosing Toronto or New York instead of Hamilton. While there are outdoor venues that can vary for capacity size, these are not feasible year-round. While the impacts of COVID-19 continue to unfold, Hamilton may face even less venue options for artists seeking a venue to accommodate a mid-level audience. This need for varying capacities is directly related to

audience size of artists and a city that aims to support and grow its artists and their audience should look to identify opportunities to have this need for a mid-size venue met.

When assessing the range of mixed-use spaces available, Hamilton must also identify spaces dedicated to Indigenous and minority communities. APTN's National Indigenous Music Impact Study highlighted the need for Indigenous communities to have safe, welcoming spaces in which to practice and perform their art, and even found that the creation of those spaces led to more non-Indigenous audiences seeking out traditional forms of music and attending their shows.³⁶⁷ Providing Indigenous or other minority artists with their own spaces fosters a sense of community and collaboration while increasing visibility within the city's events calendar and cultural offer. It is important to specify that these spaces must not be limited to religious or community centres, but should also include other facilities that may allow for multiple cultural or creative professionals to overlap. They should also be made accessible by being placed near transit services, so that they are more convenient for audiences.

JUST ADD MUSIC PERMIT - San Francisco, California³⁶⁸

What Is It: In September 2020, San Francisco Mayor London Breed announced the introduction of a new Just Add Music permit, which allows for entertainment and amplified sound in shared spaces and outdoor locations. The permit is free to obtain, but applicants should apply at least 2 weeks before the proposed activity (earlier if the activity will be taking place before 9am or after 10pm). Businesses who do not already have a Place of Entertainment or a Limited Live Performance permit may apply for activities such as live music to accompany outdoor drinking or dining, outdoor seating for concerts and festivals (max 100 people), outdoor gathering such as religious services or protests (max 75 people), farmers markets, drive-in films, outdoor fitness classes or conferences and outdoor fitness classes. Activities are subject to further health and safety regulations depending on the activity type, primarily focused on capacity levels, face masks and other social distancing procedures in accordance with COVID-19 protocols.³⁶⁹

Who is responsible: City and County of San Francisco

What has it done: No data has been released yet on how many permits have been applied for. Early reports from news outlets suggested live singing and woodwind instruments would not be permitted due to air particles,³⁷⁰ but these restrictions are

³⁶⁷ APTN (2020)

³⁶⁸ City and County of San Francisco (2021)

³⁶⁹ San Francisco Department of Health (2021)

³⁷⁰ Vaziri (2020)

not in place so long as singers and instrumentalists can maintain a distance of 6 feet from other households.³⁷¹

Lesson for Hamilton: Making temporary permitting affordable, accessible and streamlined is key to curating diverse and consistent live performances. Outdoor permitting is a great way to incorporate increased live performances into COVID-19 safety protocols while increasing revenue streams for businesses, but by no means does it need to be limited to the recovery period. Outdoor performances can continue to create atmosphere, provide audience development opportunities for artists and increase revenues for business far into the future.

Recommendation 9: Improve Transportation Around Local Shows

Timeline: Long-term (1-2 years) and ongoing

In August 2021 all-day transit between Toronto and Hamilton via GO Train service in West Harbour will begin, exposing a whole new audience to Hamilton's musical ecosystem.³⁷² As pointed out in the SWOT Analysis, targeting traveling audiences from surrounding cities to stay and participate in Hamilton's nighttime economy can increase local talent visibility and will contribute to a stronger brand for Hamilton. Ensuring that both locals and visitors have access to reliable and seamless transportation when visiting music performances or engaging in evening entertainment is a key component to sustaining a strong music economy.

While the Hamilton Street Railway provides expansive routes around the city, most routes end at 10pm with busier routes remaining open until midnight or 1:00am. The decline in service can leave areas congested and consumers frustrated when an evening of entertainment ends in travel delays. In order to alleviate this, city departments should collaborate with the Hamilton Street Railway to build circuits around shows to service the rush of audience members leaving late in the evening. In addition, high-traffic areas should have well-lit pick-up/drop-off points to increase safety and security for late night revellers and shift workers.

To effectively institute this plan, a study should be conducted to analyze which areas become most congested in the evening after performances take place. From there, venues and businesses should be consulted to coordinate pathways for public transportation and ride-share services. The development of additional routes for consumers could also be an

³⁷¹ City and County of San Francisco (2021)

³⁷² Peesker (2021)

opportunity to further promote shows through campaigns focused on engaging night-time entertainment.

Night Network Transit – Melbourne, Australia

What Is It: Public Transport Victoria has a comprehensive Night Network connecting suburbs and regional areas in the Australian province, including 24-hour public transport options on weekends since late 2015.³⁷³ The night transit programme has proven to be crucial to the development of its night time economy by providing safe, easy and cheap transport options. The City of Melbourne’s Night Network is designed to provide an all night train, tram, or bus service within one kilometre of the homes of 70% of Melburnians to encourage its use.³⁷⁴ Free Tram Zones available in the daytime also apply to late night travel, helping locals and tourists move around Melbourne’s core activities district.

The use of the night transit network is also encouraged through the recent ‘Explore the night’ campaign showing how specific Night Network routes serve those looking to enjoy Melbourne’s nightlife with a focus on live music activities. The campaign includes outdoor, radio and activations in its promotion, as well as artist-curated ‘Up-Late Playlists’ that can be accessed by scanning Spotify codes found on posters around town.

Who is responsible: Public Transport Victoria

What has it done: The Night Network has created a safer environment for music patrons, artists, and workers to travel in the evening by easing congestion and preventing security incidents.³⁷⁵ In addition the “Explore the Night” campaign has created opportunities for local talent to promote their music to the public. Local musician Ecce Vandal even produced a music single for the program.³⁷⁶

Lesson for Hamilton: Improving evening transit creates a safe environment for local residents and tourists to consume live musical performances and other night time entertainment. It also presents an opportunity to promote local music in a unique way by integrating new transit routes with campaigns for local music engagement.

³⁷³ Public Transport Victoria (2021)

³⁷⁴ Daniel Bowen (2017)

³⁷⁵ Victoria State Government (2021)

³⁷⁶ Spotify (2021)

4.2 Talent and Professional Development

Recommendation 10: Create a Working Group for Minority and Indigenous Musicians

Timeline: Short-term (0-12 months)

In 2019, the City of Hamilton published its Urban Indigenous Strategy³⁷⁷ as part of its work to recognize the history of its land, which historically belonged to the Erie, Neutral, Huron-Wendat, Haudenosaunee and Mississaugas people. The Strategy, drafted using information obtained from a series of working groups and outreach programmes, calls for a greater commitment to youth engagement, education and the creation of safe spaces. As a part of this, the Strategy advocates for Indigenous art in public spaces and increased artistic programming. These elements can all be integrated into the development of an inclusive music strategy, translating to community outreach and professional development programmes, dedicated venues and cultural spaces and the sustained integration of Indigenous and other minority stakeholders at a policy level.

Representation is a vital element of a robust, well-rounded and successful music strategy for any city. Hamilton must ensure that Indigenous and minority communities are invited to both the discussion forum and the leaders table in order to ensure that their experiences and perspectives are taken into consideration when decisions are being made and their cultural contributions are woven into the city's forward-facing musical identity. Representation in leadership can be achieved by introducing a working group of community leaders, industry stakeholders and city policy-makers which meets every one to two months. Similar to HMAT, this working group would work with Creative Industries and Cultural Development and have the ability to advocate for resources that would help bolster Indigenous music traditions and performance practices around the city. In addition to the working group, Indigenous representation should be built into the Music in Hamilton webpage and other data repositories so that resources and support are easy to access. At an industry level, the city must recognize any imbalance in access to educational resources and performance opportunities. Youth outreach and professional development programmes can ensure equity in access to opportunities across the next generation of musicians and music professionals. Additionally, all events and festivals receiving city funding must incorporate minority communities in some form, be it through performance opportunities at the event or through a commitment to community engagement activities. Each step contributes to a greater strategy that cultivates an inclusive and vibrant music city.

³⁷⁷ City of Hamilton (2019)

WOMEN IN MUSIC – Nationwide, Canada³⁷⁸

What Is It: Women in Music Canada is a non-profit organization that works to promote gender equality within the music industry by supporting female-identifying musicians and music industry professionals no matter what stage of their career they are in. They organize career development initiatives such as workshops and networking events in addition to conducting research and engaging with the industry to gain insight on the needs of its stakeholders.

Who is responsible: Women in Music is an non-profit organization led by a board, strategic committees and a network with thousands of music industry stakeholders.

³⁷⁹

What has it done: The organization maintains a list of links to resource lists ranging from COVID-19 recovery help to safe spaces, mental health and provincial funding organizations.³⁸⁰ It has released two research reports to date: "Women in Music - Empowering Diversity: A Study Connecting Women in Leadership to Company Performance in the Canadian Music Industry" and "Women in Music: A Profile of Women Working in Ontario's Music Industry". A third report, "Women in Music: Advancing Opportunities for Women and Girls in Music" is due to be released shortly. In March 2021, Women in Music Canada held a series of workshops, speakers, and roundtables in celebration of International Women's Day.

Lesson for Hamilton: Minorities and underrepresented communities must be actively advocated for in order to help them overcome the unique challenges they face and lend strength to their voices. Often, these challenges center around the themes of safe spaces, mental health help and access to funding or educational resources. Having a dedicated working group or organization to engage with such communities can help ensure equity.

Recommendation 11: Advocate for Incentive Schemes for Music Businesses and Projects

Timeline: Medium-term (1-2 years)

³⁷⁸ Women in Music (2021a)

³⁷⁹ Women In Music Canada (n.d.)

³⁸⁰ Women in Music (2021b)

Incentives are a great way to attract new businesses and encourage existing entrepreneurs to remain in Hamilton while they build their businesses. Incentives should foster the growth of support businesses in the subsectors of music production, development and promotion in order to begin growing Hamilton's availability of music industry professionals to serve its local musicians. There are many ways to present incentive programmes. The following ideas are inspired by similar existing or past programmes in places such as Louisiana and Georgia.

Wage credits are tax credits given to businesses that create music-related jobs. Wage credits are issued as a percentage off of each T4 wage. In order to effectively and sustainably institute such a scheme, certain parameters must be put into place:

- Each credited job must have full-time hours year-round.
- Each job must pay, at minimum, Hamilton's living wage.
- The job must be a direct music industry role, to include music education, music performance, session musicians, front of house engineers, music retail stores and the like.

Expenditure credits are those issued to offset the costs of music-related projects, so long as those costs are spent locally. Parameters should include:

- At least 50% of the project's total expenditures must be spent within Hamilton at local businesses OR
- At least 25% of creatives or professionals contracted for the project must be Hamilton residents
- Credits may only be issued for qualifying expenditures, to include studio rental costs, set design, travel costs directly to and from Hamilton as well as within Hamilton, instrument or equipment rental and salaries of locally contracted workers.

Business credits affect property tax rates and are a great way to retain small businesses, which are some of the first entities to be priced out of their areas when cities grow. Parameters may include:

- Small businesses are defined as those with less than 100 employees. This ensures the credits are not given to large corporations through a loophole.
- Larger credits can be given to businesses choosing more rural or under-developed areas to help encourage growth across the city.

In addition to business and project incentives, certain credit schemes can be put into place to incentivise events and live music venues to hire local musicians in their programming. This can include grants or subsidies for those who meet a quota of local acts on their event's bill (50% for non-profit events and 25% for out-of-state promoters) and tax credits for restaurants

or other venues with live programming who hire at least 80% local musicians (or a sliding scale of increasing credit amount for large proportions of local musician hires). The purpose of these programmes is to expand opportunities (particularly paid opportunities) for local musicians.

Some incentives may be able to be combined, such as wage credits and business credits, and can be packaged and marketed as such to prospective businesses and professionals. However, there should still be a cap on the total amount of credits received, either presented as a flat figure or as a percentage of the business's total annual revenue.

LOUISIANA TAX CREDITS - Sound Recording Investor Credit³⁸¹

What Is It: The State of Louisiana offers several tax credit pathways applicable to the music industry, one of which is the Sound Recording Investor Tax Credit, also known as the Sound Recording Program, which provides an 18% tax credit for recording projects produced in Louisiana. Music, spoken word and poetic performances with expenditures relating to studio rental fees, artists and musician salaries, producer fees, etc. are eligible. Combined with state of the art music facilities and a diverse array of artists, these tax incentives support the local music economy while attracting non-local talent.

Who is responsible: Louisiana Economic Development

What has it done: Since 2017, spending and job creation under The Sound Recording Program has trended upward. Local creatives have expressed appreciation for the Program's ability to provide in-state recording opportunities. In addition, recording artists and professionals that have previously taken their business elsewhere have started recognizing Louisiana as a prime location because of these incentives. For example, Louisiana residents "pointed to the ability to record music in Louisiana for motion picture productions that are being produced outside of Louisiana" as a benefit of the tax credit. While COVID disrupted some music production, through careful social distancing practices and the ability to record remotely, Louisiana residents have continued taking advantage of the Program throughout the course of the pandemic.³⁸²

Lesson for Hamilton: Providing tax incentives for music businesses aids in job creation and the development of a thriving music economy. Not only does it support local talent by allowing artists and professionals to pursue careers in the music

³⁸¹ Louisiana Economic Development (2021)

³⁸² Louisiana Entertainment (2021)

industry full-time, it also attracts out-of-state talent and provides the ability for cross-state collaboration. Tax incentives, such as the Louisiana Recording Investment Credit, help sustain the music ecosystem by encouraging investment, creating jobs, and promoting the state as a destination for business ventures in the music sector.

Recommendation 12: Create a Series of Professional Development Resources

Timeline: Short-term (0-12 months) and ongoing

Hamilton's proximity to nearby industry hubs such as Toronto and New York city mean it is always competing for the business and residential commitment of musicians and music industry professionals. The music industry is always changing, adapting to new technologies and changes in consumption patterns. This has particularly been true in the last year as the COVID-19 pandemic has forced venue closures, and the industry has shifted to digital platforms wherever possible to maintain audience interactions. Although already offering some resources for professional development through the Music Entrepreneurship Conference and collaborations with local music businesses, Hamilton can define its reputation as a haven for skills development and strengthen the skills of its local creative workforce by promoting existing resources and maintaining various mediums of informational and educational resources, all either free or affordable to obtain, similar to the one-on-one consultancy with local businesses already managed by Cultural Development.

Industry guides are a good source of information for self-educated musicians wanting to hone their business skills or budding entrepreneurs wondering where to start. The current list of COVID-19 resources available on the Music in Hamilton web page is a great example of such a collection, and should be expanded to cover a wider variety of topics applicable to year-round and non-pandemic-related operations. Such topics can include how to register via SOCAN, create a press kit, draft a basic release and marketing strategy for a single, apply for a business license, apply for an events permit, distribute songs via various streaming platforms, track and utilise social media engagement figures and more. These should be either links to existing resources or drafted with the close advice and assistance of music industry professionals and organizations to ensure accurate, up-to-date and first-hand information.

Workshops can also be a great way to generate hands-on experience as well as job and networking opportunities for industry professionals. This is also something that can be organized while shutdowns are still in effect, transitioning to digital interfaces for people to learn at home, and when it is safe to host them in person again. They can be an expansion of

the current quarterly Creative Exchange programme³⁸³ and annual Musician Entrepreneur Conference, ensuring year-round access to live education. The Music Officer should host these sessions once a month and the events should be promoted on the sector website and through social media channels. Workshops should be no more than 2 hours long, and it is important that they remain accessible to everyone by being either free or affordable (no more than \$20). Local guest speakers may also be invited for a deep-dive into a subject or a masterclass format with a question-and-answer segment at the end. The Music Officer should host these sessions once a month and the events should be promoted on the sector website and through city social media channels. Ideas for topics can be correlated to the industry guides and may include:

- Social media marketing
- Intro to streaming platforms
- Intro to digital audio workstations (DAWs)
- Creating a business plan
- Budgeting
- Basic contract and IP law
- Home studio setups
- Health insurance (including affordable mental health services) and income taxes for freelancers

MUSIC BC'S HOW-TO FROM HOME SERIES - BRITISH COLUMBIA/DIGITALLY GLOBAL³⁸⁴

What Is It: Music BC's How-To series brings workshops, masterclasses and other professional development discussions to music industry players throughout the year, accessible from the comfort of their own homes. The series covers themes such as songwriting, how to obtain funding, marketing and touring and caters to all career levels and industry subsectors, with guest speakers offering additional insight into each topic.

Who is responsible: Music BC

What has it done: Prior to the COVID-19 pandemic, workshops were held at the Music BC office in Vancouver and cost \$20 for non-members (workshops were free for members). Due to stay-at-home orders, workshops have since shifted to Zoom

³⁸³ City of Hamilton (2021c)

³⁸⁴ Music BC (2021)

and other livestream platforms and are free to attend. To date, workshops have covered the following topics:

- How to Generate Monthly Fan
- Subscription Revenue
- Apple Music Canada Masterclass
- Youtube Music Masterclass
- How to Leverage the TikTok Community
- Creating Visual Content That Sings: Strategies for Staging + Filming Video at Home
- How to Foster a Respectful Workplace
- How to Master Touring & Promotions
- The Festival Experience: Industry Panel
- How-to: Tax Tips for Musicians
- Business Series for DIY Musicians: Financial Planning, Contract Essentials, Royalties Overview and Tax Tips
- Promoting Mental Health in the Music Industry

Lesson for Hamilton: Many artists are self-taught, and therefore do not necessarily have the business acumen to reach the full potential of their careers or take care of the administrative sides of their business in order to protect their rights and maximise revenue. A regular digital series keeps cost at a minimum while broadening accessibility. Guest speakers also provide experiential learning and sources of advice while giving opportunities to local professionals or deepening connections with professionals from other locations.

Recommendation 13: Support Accelerator and Incubator Programmes

Timeline: Long-term (2+ years)

Where businesses and fully-designed projects will benefit from incentive programmes, Hamilton will really set its competitive advantage by offering support to those still in the brainstorming and draft phases of their work. Many who work in the music industry are self-taught, which means they often lack the business skills that are needed to maximise their efforts and make educated financial and legal decisions. Incubator programmes bridge this gap by guiding participants from idea creation to project launch while teaching them business skills and strategic planning that will ensure their self-sustainability for years to come.

Participants may be expanding on an existing business idea or (for artists) career level, or they may be creating an entirely new piece of work.

Programmes should last between six to eight weeks, giving participants enough time to work out the details of their chosen project and feel supported both up to and through the launch. Curriculums involve several elements, which are ultimately decided in close collaboration with local practicing professionals, but may include brainstorming sessions, workshops and one-to-one mentoring sessions. Site visits to local businesses serve as a great hands-on educational resource, as well, while guest speakers are a great way to involve local, regional and visiting professionals or artists for first-hand experience and success stories. While many of the elements of the curriculum are shared with other city-wide development initiatives, such as guest speaker events and business skills workshops, the incubator programme is much more curated and covers additional elements such as public speaking and presentation skills. The most valuable difference between general workshops and incubator programmes, of course, are the bespoke curriculum based on the project needs, complete with mentorship guidance. Programmes usually culminate in a series of presentations by participants, be it a released product or final business plan.

Graduates of incubator programmes are often eligible for secondary accelerator programmes, which offer shorter curriculums with heavier emphasis on one-to-one mentorship and project expansion rather than creation. There may also be more hands-on opportunities or apprenticeships with businesses or professionals that have achieved similar goals.

Participants are usually chosen via a standard application process or a referral. While incubators are a great way to support local musicians and strengthen the local workforce, Hamilton should also welcome applicants from outside of the city, as it creates an opportunity for network growth and presents a chance to showcase what the city has to offer its musicians! This can help further grow its reputation beyond the immediate region. Small subsidies funded by the hotel tax can help offset accommodation costs for them. Group applications are often encouraged, as groups generally share the same goals, which not only boost programme success rates but also make these participants more likely to continue on their work as a team even after they've completed the programme. In fact, once accepted, it is recommended to group participants together into 'pods', anyway as this spurs idea growth, teaches business and collaboration skills, and allows for further avenues of feedback for the duration of the programme. Mixed groups also connect participants to similarly creative-minded people of different backgrounds and different perspectives, which fosters further creativity.

SYNTHESIZER - Tel Aviv, Israel³⁸⁵

What Is It: Synthesizer is a 3-month accelerator programme during which artists participate in weekly group intensives, workshops, professional consultations, and lectures. Participants are also matched to a personal mentor to help guide them during the programme. The curriculum teaches them:

- How to define themselves as an artist and create a unique presence
- How the independent music market works, from creating a business plan to navigating contracts and understanding the chain of processes and professionals within the industry
- Performance essentials from developing a stage presence to designing a setlist and capitalizing on the promotional opportunity
- How to establish a social media presence and utilize marketing tools and sponsorships to maximise impact or increase the chances of virality
- How PR and media interact with and serve the music industry, and how to create effective PR materials
- How to book tours and shows, including how to negotiate the best deal
- How to network for business contacts, creative partners and audience growth, and how to leverage fans to boost promotion
- How to maximise revenue by understanding and taking advantage of legal rights, royalties and sync deals
- How to break into international markets, particularly depending on local trends and each artist's typical demographic
- How to fund projects through grants, crowdfunding or other pathways and how to project manage to maximise resources

Additionally, each participant is given the opportunity to record a live session as a single as well as perform at the closing showcase, open to music industry professionals and the general public.

Who is responsible: Synthesizer is a non-profit organization run by a staff of 9, as well as 12 lecturers and 22 mentors.³⁸⁶

What has it done: The accelerator has seen 4 cycles so far, with 12 artists or bands served per cycle.

Lesson for Hamilton: One of the driving beliefs in Synthesizer's vision is that musicians often need independent management skills the most around the same

³⁸⁵ Synthesizer (2021a)

³⁸⁶ Synthesizer (2021b)

time that they are investing more into their careers before seeing the same return. Having help during this period plays a huge role in determining how much further an artist is able to take their career.

Recommendation 14: Implement Affordable Housing and Creative Space Opportunities

Timeline: Long-term (2+ years)

Safe, high-quality and affordable housing and co-working spaces are a foundational resource for both amateurs and professionals, giving them a place to hone and present their talents, network, rest, and live. This especially pertains to BIPOC artists who, due to wealth inequities and discriminatory practices, may not have the ability to independently fund creative projects. Music and its supportive business endeavors need physical infrastructure and purpose-built equipment to grow to its full potential and support their artistic population. Currently, Hamilton is short of mixed-use facilities with the capacity to serve as rehearsal spaces as both coworking spaces for creatives and housing. Accessibility is vital for the grassroots scene, as many who are new to the industry will lack direct access to such resources and maybe not even know where to start looking. Such facilities are also priceless networking tools and educational resources, as they create meeting points for professionals that may otherwise not have crossed paths.

Creative spaces are often one of the most at-risk categories as cities grow and new developments are built. While Agent of Change is a great way to protect existing spaces, Hamilton still needs to bridge the gap between what exists and what encompasses a well-rounded, robust built environment. The city should work with developers to create awareness of which amenities are needed for the music industry and introduce more mixed-use spaces that can foster cross-industry collaboration and boost audience interaction.

Creating rent-controlled spaces will help ease this burden slightly while also fostering a collaborative network of artists living under the same roof. Applications should be detailed, and require artists to submit proof of industry experience, proof of a current or upcoming project, and proof of income (both directly music-related and total income) in order to qualify, and rent should be no more than 30% of artists' total income. Artist leases should also be capped at 2-3 years in order to ensure others get a chance. The application should be developed by and submitted to the relevant city department over the course of an annual

online open-enrollment period and residents should be chosen in collaboration with city departments, the Music Officer, and contributing partners. In order to encourage participation and funding from developments and businesses, affordable housing should be considered an in-kind resource and thus eligible for tax incentives and subsidies from supporting residences. Additional funding can be gleaned from Hotel Tax implementation as suggested in the coming COVID-recovery recommendation.

Many creative professionals maintain day jobs in alternative industries in order to support their cost of living as well as afford equipment or travel expenses related to their music. Ensuring space for creation, collaboration and learning will be vital for these communities. Within these structures there should be a city-subsidized space that can be rented out for a flat competitive rate or a scaled rate based on the artist's income or the project's budget. Access to these amenities should also be available to non-residents who can reserve time through an online booking portal complete with a real-time calendar. Rehearsal spaces would include smaller lesson rooms or practice rooms, as well as spaces large enough to fit an entire band. Having a professionally soundproofed room with basic equipment such as a piano and amp will create a convenient place for artists to practice without risking disturbing community members.

CULTURAL SPACE AGENCY PUBLIC DEVELOPMENT AUTHORITY - Seattle, WA

³⁸⁷

What Is It: In December 2020, Seattle Mayor Jenny Durkan signed a charter launching the Cultural Space Agency Public Development Authority, a public property development group that creates real estate space for cultural use by BIPOC communities that have been historically burdened by institutional racism. This is the first new public development authority in 40 years. Once underway, the CSAPDA will work to build community wealth through cultural investment opportunities and real estate projects, partnering with commercial real estate developers and cultural leaders in underrepresented communities to create tangible real estate assets that serve each community's needs and desires.³⁸⁸ The PDA will maintain long-term control of the site in partnership with each site's respective community representatives.³⁸⁹

³⁸⁷ City of Seattle (2020)

³⁸⁸ Lindsay (2020)

³⁸⁹ Engelson (2020)

Who is responsible: The City of Seattle and BIPOC leaders working in the cultural, community development and commercial real estate.

What has it done: The PDA is newly announced, and no purchases have been confirmed yet, but the City of Seattle will contribute US\$500,000/year for two years to cover initial operating costs. They expect philanthropic investors to contribute millions as well.

Lesson for Hamilton: Many arts communities do not have the tools or knowledge to navigate the world of finance and real estate, but BIPOC communities have even less representation at the table. Hamilton can create and fulfill opportunities for underrepresented arts sectors by leading activities to secure safe, affordable and quality spaces. The city's departments, by nature, understand the legalities and permitting that accompany property development, and by stepping in as the broker, the city can maintain affordable rates as cost of living goes up and commercial real estate increases in cost. This creates an invaluable service which allows the creative sector to maintain or even multiply their physical assets as property prices rise.

Recommendation 15: Create a Music Industry Jobs Board

Builds on: J

Timeline: Short-term (0-12 months)

As COVID-19 forced economies around the world into lockdown and social distancing practices, many companies shifted to a remote workforce. Websites such as Upwork and Fiverr are also contributing to the growth in freelance professionals who derive either all or a portion of their income from contracted work. Today, Forbes estimates over $\frac{1}{3}$ of the workforce derives at least some of their income from freelance work,³⁹⁰ a figure that is expected to grow as both employers and workers become accustomed to the flexibility associated with working from home. Combine this with the traditional self-taught and word-of-mouth structure of the music industry, and you have a workforce ready to apply to opportunities both big and small.

³⁹⁰ Wyman (2020)

Hamilton can capitalize on this trajectory by creating a localized job board which focuses on both temporary and permanent positions within the city's music industry. The board would serve as a solitary advertising point for any positions available or extra hands needed, from instrument techs and stage crew for an event to engineer assistants in recording studios, photographers and makeup artists for album covers and web designers for music business or artist websites. It should be made available on the Music in Hamilton webpage and managed by the Music Officer. It should include a simple submission form for a new job opening which describes the position, experience needed (if any) and contact information of the hiring party. A job board such as this would not only help connect the local music industry, but it would strengthen the collaboration and communication streams between all creative and media industries in Hamilton and provide a more grassroots approach to hiring that can be favorable towards those who are self-taught or just finding their feet within the industry.

ARTS FOR LA- Los Angeles, California³⁹¹

What Is It: Arts for LA is a network of local arts advocates throughout Greater Los Angeles who provide resources to the creative community, advocate for continued arts funding, and promote arts education. In addition to their advocacy and mobilizing efforts, Arts for LA manages a job board for people seeking jobs in the creative industry and for employers looking to hire artists and industry professionals in the Greater Los Angeles area. Job listings range from performance gigs to managerial and executive roles in arts organizations. Arts for LA does not charge for this service, but promotes transparency and equity in their postings through a rigorous submission process where employers are asked about pay details and job length. Arts for LA immediately rejects job postings that do not include a salary or pay range, including unpaid internships.

Who is responsible: Arts for LA is a 501(c)(3) non-profit organization which is funded by public and private donors and philanthropists and is managed by a full staff, board of directors, and advisory team.

What has it done: Their job listings are updated every two weeks and include postings from organizations and companies like the Hollywood Fringe Festival, the Gay Men's Chorus of Los Angeles, and the Young Musicians Foundation.

Lesson for Hamilton: Hamilton can incorporate a similar job board on their Music in Hamilton webpage or another relevant online space. The key takeaway here is accessibility and transparency. Hamilton's job board should include similar details on pay, benefits, duration of the position (as the music industry tends to be a gig

³⁹¹ Arts for LA (2021)

economy), etc. Having an industry jobs hub with integrated business profiles is also a great tool for attracting prospective investors or new music businesses wanting to get a better idea of the local infrastructure and availability of opportunities.

Recommendation 16: Expand Access to Music Industry Internships and Apprenticeships

Timeline: Medium-term (1-2 years)

One of the biggest challenges for Hamilton is the lure of nearby industry hubs such as Toronto and Vancouver, cities that offer many opportunities in terms of educational pathways and career growth. In order to compete and retain its home-grown talent while attracting fresh talent to plant their roots, Hamilton will need to capitalize on its relatively low cost of living while increasing its access to high-quality resources. In addition to the professional development resources and incubator/accelerator programmes, having an internship programme can bridge the gaps between higher education and the professional workforce. Graduates and self-educated professionals are much more likely to remain in Hamilton if there is a network of resources available to them to continue on their career trajectory.

A general K-12 music education will not teach students all the different sectors of the music industry, leaving many to associate working in music as being a musician or maybe a manager. Giving K-12 students access to immersive, experiential learning opportunities in the music business really shapes their future in the industry and teaches them the behind-the-scenes details of music industry operations. Internships should be designed in close collaboration with local institutions such as Redeemer, McMaster and Mohawk as well as local recording studios, radio stations, music venues, arts organizations or other businesses that are established as the city grows. This team of educational thought leaders will help design the curriculum, including its requirements and success indicators, in order to create a reputable, well-rounded and applicable programme. Internships must be paid, subsidized by a city music fund, and will take the form of entry-level positions lasting 3-6 months, although mid-level positions could be considered pending the participant's existing qualifications.

It is important to keep in mind that higher education is not desirable or financially feasible for many. A similar scheme, perhaps presented as an apprenticeship, should be introduced to ensure those not attending higher education institutions are also given access to experiential learning. This will be an invaluable tool for self-educated musicians to build their network and prove their readiness at a professional level. Applications should be made available online,

with intakes occurring twice each year, in line with school semesters. All internships and apprenticeships should be posted on the music industry jobs board.

SOUND THINKING – New York City, New York³⁹²

What Is It: Sound Thinking NYC is an educational programme aimed at women in grades 11 and 12 who want to pursue music careers. The programme is city-funded and free to attend. It lasts three weeks and gives students experience in production, audio technology and sound recording through hands-on ProTools workshops, site visits to recording studios and music business offices and panel discussions with female-identifying music industry professionals. Those who attend also retain access to free workshops throughout the remainder of their school year and are able to apply to paid summer internships and free CUNY accredited courses.

Who is responsible: City University of New York's Creative Arts Team and the Mayor's Office of Media and Entertainment, in partnership with NY is Music, a local nonprofit.

What has it done: The programme had 40 enrolled students in 2019 representing all five boroughs and various ethnic and socioeconomic backgrounds. Although they were expecting to host two rounds in 2020, their plans were interrupted by the COVID-19 pandemic.

Lesson for Hamilton: Local universities and business are a great resource to tap into when pursuing educational opportunities for youth or even budding professionals. Programmes do not necessarily have to be long, but should provide hands-on training and offer participants the opportunity to network and build connections with future employers or business partners.

³⁹² Mamo (2018)

4.3 Marketing and Branding

Recommendation 17: Promote Local Music amongst Locals, Young Professionals, and Visitors

Timeline: Short-term (0-12 months)

One of the most basic steps will be to increase airplay for local music on local radio stations, podcasts and playlists. Radio is a key way for artists to share their music, reach local audiences, and be given the ability to provide more insight into the creative process through interviews. Shifting into the streaming world, playlists act as tastemakers, ensuring listeners that the listed songs have already been curated for selection. Podcasts bridge the gap between the two mediums, reaching those audiences who have shifted entirely to streaming consumerism while still desiring interviews and ‘behind the scenes’ features in addition to the music itself. This can help build a connection between artist and listener while also humanizing Hamilton’s music industry as whole by providing voices and faces to represent the musician’s experience in the city.

The Music Officer in collaboration with HMAT should use their database of people in the music sector to contact local artists and stakeholders who would be interested in either curating or being featured on playlists and podcasts. The Music Officer would also be responsible for reaching out to and building relationships with local radio stations in order to promote and feature local artists. In addition to radio, local music can be played on evening transit and high traffic downtown areas as part of a coordinated campaign to introduce both tourists and local residents to Hamilton’s talent.

SEATAC’S EXPERIENCE THE MUSIC PROGRAMME - Seattle, Washington³⁹³

What Is It: In 2012, Seattle began a three-year programme which aimed to showcase the city’s cultural talent and creative industries through live programming at the airport. Funded by the Port of Seattle and various merchant at the airport, Experience the City of Music saw live performances being carried out 7 days a week in the terminals, overhead music being played in common areas, artist-recorded overhead announcements broadcasted periodically, curated videos displayed on terminal digital billboards and baggage claim monitors and a dedicated radio player made available through the airport’s free wifi network.

³⁹³ Huffpost (2012)

Who is responsible: The Seattle Office for Film and Music, in partnership with the Port of Seattle, the Music Commission and Play Network, a private music branding firm.

What has it done: In 2013, 58 musicians took part in the programme, accounting for over 1,800 hours of free live music. The popularity of the programme allowed it to be extended until live performances were cut short due to the COVID-19 pandemic. In 2021, the airport introduced its “Music Wall”, a 12x7 digital screen that plays a two-hour loop of performances from 30 Seattle-area musicians. Any donations received for the wall are distributed among the featured artists.³⁹⁴

Lesson for Hamilton: Placing music in high-traffic areas gives musicians and, by default, the city’s music industry a valuable public platform to perform, build a fanbase and help define Hamilton as a music city. Similar to busking, bringing music to transportation hubs, government buildings and public squares or parks helps create atmosphere and integrate music at every opportunity.

Recommendation 18: Create a Music Destination Campaign

Timeline: Medium-term (1-2 years) and ongoing

Creating a publicly perceived music city brand is all in how music is incorporated into every aspect of city operations and every point of the audience, artist and visitor experience. Hamilton has already started this process by developing trademarked music branding, but there’s still work to be done to have Hamilton’s musical identity adopted and fully integrated into the city’s infrastructure. Creating a music destination campaign is a great way to promote audience awareness and experiential tourism. Such work would primarily focus on highlighting the city’s grassroots venues circuits, which are the year-round home of quality, local live music outside of larger tours. Grassroots venues serve as the building blocks of Hamilton’s local music industry and artists’ careers, allowing them to establish their stage presence and begin building their fanbase. They serve as a place for opening acts to play warm-up shows (barring any radius clauses for larger events in the region) or places for such acts to return to with their own tour later on. There are many ways to communicate these venues to both locals and visitors:

³⁹⁴ Brodeur (2021)

- Promote Hamilton's grassroots venues on the Tourism Hamilton website. Just as there is a Sports Tourism heading, there should be a Music Tourism heading by which visitors can browse a full list of local venues, experiences and sites of interest. This should be combined with the existing events calendar.
- Update the local events calendar to make music more accessible and forward-facing. Currently, visitors to the Tourism Hamilton website must find upcoming music events by following the Homepage > Events Calendar > Arts & Culture > Music Venues trajectory. As with the above point, in order to remain on brand as a music city, the website must allow for access to music activities in fewer clicks.
- Work with local hospitality businesses and travel agencies to link the music calendar on their website and follow up with confirmation emails. Additionally, provide printed events calendars for them to provide guests at check-in.
- Designate space around the city, particularly at high-traffic locations such as the GO Centre and Downtown Hamilton, to post flyers for upcoming shows.
- Work with local hotels and Airbnb owners to provide discounts, vouchers and other promotional materials for local venues in all guest units. In the long-term, this can also be expanded to provincial businesses, transport agencies and larger music venues with mail-order ticket packaging.
- Create a 'music passport' initiative which allows visitors to patron multiple venues in exchange for discounted drinks or food at participating venues.
- Work with Airbnb to provide more Experiences which centre around music, such as a songwriting workshop, instrument lesson or live show.

It is important to utilize all of the industries available in order to maximise audience reach. By only marketing the city's music offer to existing music fans, you limit audience growth and create a fanbase echo chamber of sorts. Those not actively seeking live music will remain unaware of the city's offer. Tourists are increasingly looking for authentic and memorable experiences, and there is no better way to do this than to tie together multiple elements of the city's cultural offer such as gastronomy, sports and fine art in order to show the true breadth of what makes Hamilton unique. Music must be present across all channels from local media outlets to physical public spaces, and promotion should be aimed at both locals and tourists.

COME HEAR NC – Statewide, North Carolina³⁹⁵

What Is It: The State of North Carolina declared 2019 to be the Year of Music, celebrating its USD\$1.95 billion statewide music industry which supports over 40,000 jobs and over 3,700 music-specific businesses. The key initiative under this banner was Come Hear NC, a year-long celebration of the state’s music history and continued contributions to all genres of music.

Who is responsible: The State of North Carolina, in partnership with the North Carolina Arts Council and the Department of Natural & Cultural Resources.

What has it done: Key components of the campaign included the ‘365 Days of North Carolina’ music stories on the official campaign website, ComeHearNC.com. There were also exclusive live streams of performances, special ‘tiny’ concert film, commissioned North Carolina artist pairings and North Carolina branded musician stages at various festivals throughout the state, including MerleFest, IBMA/Wide Open Bluegrass and the NC Folk Festival.³⁹⁶ The campaign also ties into existing initiatives, such as the North Carolina Music Trails (Blue Ridge Music of North Carolina and African American Music Trails) and Traditional Arts Programs for Students (TAPS), a statewide afterschool program that teaches the traditional arts programmes of the region.

Organizers developed a toolkit for interested partners to download and learn how to participate. The toolkit includes a brand guide for incorporating the official Come Hear logo, talking points for discussing the reasons behind the campaign and its various activities, ways to get involved from every sector of the music industry and a downloadable ‘fun facts’ map to display or disperse.³⁹⁷

Although the campaign officially concluded at the end of the year, promotional efforts and initiatives carried through to 2020, with continued ‘North Carolina’ stages at festivals, public school curriculums and multimedia journalism online.

Lesson for Hamilton: Music can be integrated into so many aspects of day-to-day activity, from traditional live performances to education and physical ‘trails’. A city-wide effort to promote its local music industry should include all businesses a fan may interact with during their trip, even if it’s just their nearest gas station! This will

³⁹⁵ North Carolina Arts Council (2019a)

³⁹⁶ North Carolina Arts Council (2019b)

³⁹⁷ North Carolina Arts Council (2019c)

continue to remind them, no matter where they are, that music can be found in Hamilton.

Recommendation 19: Create a Music Export Programme

Timeline: Long-term (2+ years) and ongoing

A music export programme is a great way to highlight, celebrate and promote Hamilton's diverse range of artists and genres. Such a programme facilitates showcasing opportunities which present artists to new audiences while defining the city as a place where quality talent is grown. It is vital that participants represent a variety of genres and backgrounds in order to promote equitable representation and build Hamilton's reputation as a place for all artists to pass through while on tour or settle down in.

A music export programme will require strong connections with local, national and international industry bodies, to include (but not limited to) Hamilton Creative Industries and Cultural Development, Music Ontario and Canada Council for the Arts. Creative Industries and Cultural Development should appoint a single liaison to begin connecting with and preparing prospective local artists for export by advising them on self-marketing for audience growth and additional performance opportunities for skills building. An artist that is 'export ready' might be one that has released work which has achieved a minimum amount of sales or streams, an artist with a team of support professionals, those with business or release plans and those who have toured or performed outside of the city on their own volition. The requirements for participation can be cross-referenced with those resources available as part of the Office's professional development series in order to give those who wish to qualify a starting point from which to build their readiness. Participants may be selected via an audition process, a local 'battle of the bands' style competition or a recommendation from a local industry stakeholder.

The export programme would not necessarily be a defined curriculum, but rather a collection of initiatives from which to choose depending on the artist's and city's needs at the time. External marketing and promotion actions would be to utilize local artists' music for tourism campaigns and place advertisements in international print pieces. This should graduate to interactive appearances and placements, such as coordinating interviews or podcast spots for artists and inviting artists to cultural summits and conferences to perform. The culmination of the export programme, for those most ready, would be placement at a performance-based

music conference such as South-by-Southwest, Reeperbahn Festival, Waves Vienna or The Great Escape, in collaboration and partnership with established efforts like Music Ontario, CIMA, and FACTOR.

With consumers being increasingly marketed to from all angles, authenticity is more desirable than ever. Humanizing the music industry and providing faces for it lends these elements to promotional work. It is vital that all artists are fairly compensated for their appearances and the use of their music. This is a golden opportunity to encompass inclusion and diversity, particularly working to incorporate minority and Indigenous artists and acknowledge the cultural impact that they have had on the history of the region. Historically, Indigenous and other minority artists have had fewer support systems in place to establish their presence in the local music industry, and an export programme is a chance to rectify this balance. Opportunities should not be limited to those practicing traditional forms of musical expression, but should also present those artists creating any genre of music in order to expand the definition of 'Indigenous music' beyond the traditional.

MUSIC EXPORT MEMPHIS - Memphis, Tennessee³⁹⁸

What Is It: Music Export Memphis is an organization that creates opportunities for Memphis's musicians to showcase their music outside of the city. The organization creates opportunities and provides financial support for artists, helping them tour and build their audiences outside of Memphis. By investing in local artists, it drives further investment in local small businesses, such as recording studios, and allows artists to broaden their network (and thus, the local music industry's network) outside the city and even the nation. In doing so, it aims to promote vibrancy in the city, increase engagement and educational opportunities, preserve the city's character through cultural exchange and solidify Memphis as a national cultivator and home of talent.³⁹⁹

Who is responsible: Music Export Memphis is run by a staff of 13, including a representative from Memphis Tourism, radio programme manager, venue director, educator and other industry stakeholders.

What has it done: The organization has four primary artist opportunities, available to artists that permanently reside or are a student within 25 miles of Memphis, record in Memphis, primarily record and perform original music:

1. Ambassador Program - provides unrestricted cash grants for tour support to artists that have 5 or more dates booked at least 100 miles outside Memphis.

³⁹⁸ Music Export Memphis (2021a)

³⁹⁹ Music Export Memphis (2021b)

Artists are given the opportunity to create a promotional video for their tour, within which they'll highlight their favourite local spot, and can avail of a Memphis-themed hardback suitcase to sell their merch from. Applications are judged based on the geographic reach of the tour, the quality of the artist's music, the artist's existing brand and its viability as a promotional driver.⁴⁰⁰

2. Ambassador Industry Scholarships - funds artists wishing to attend conferences or professional development programmes outside of the city. If early bird rates are applicable, MEM will only fund the lowest-tier admission price. Artists who receive funding are required to work with Memphis Slim House to create a workshop, masterclass or seminar to present what they learned at the conference.⁴⁰¹
3. Merch Fund - provides money for artists to cover the costs of creating merch or CD/record pressing. Grants are USD\$250 for projects that cost up to USD\$750 or USD\$500 for projects exceeding USD\$750. Applicants must submit a quote from the locally-based supplier alongside their application, and MEM will pay the supplier directly. Artists who receive funding may be asked to donate a resulting merch item to a silent auction. Artists can apply multiple times, but are limited to receiving USD\$1,000 per calendar year.⁴⁰²
4. AmericanaFest 2021 - MEM organizes the Pure Memphis Happy Hour, presenting the best local Americana artists. Artists can apply for a spot on the MEM website, and must only fulfill the general MEM requirements (listed above) to be eligible.⁴⁰³

2021 saw the introduction of the Artist Advisory Council, a group of 13 music industry stakeholders and professionals who attend quarterly meetings to advise the organization's staff on how their programmes and processes are serving musicians. They do not make funding decisions, and are therefore still eligible to apply themselves.⁴⁰⁴

Lesson for Hamilton: Export programmes have the two-sided benefit of providing artists with opportunities to perform and promoting Hamilton as a city filled with diverse and high-quality music, making it attractive to both artists and tourists. Performance opportunities can be expounded upon by requiring reciprocal services from artists, such as the videos and masterclasses required by MEM.

⁴⁰⁰ Music Export Memphis (2021c)

⁴⁰¹ Music Export Memphis (2021d)

⁴⁰² Music Export Memphis (2021e)

⁴⁰³ Music Export Memphis (2021f)

⁴⁰⁴ Music Export Memphis (2021g)

4.4 Covid-19 Recovery and Long-Term Funding

Recommendation 20: Extend and Expand Existing Investment and Recovery Plans

Timeline: Short-term (0-12 months)

While COVID-19 has undoubtedly affected every aspect of the global economy, one of the hardest-hit industries has been music and entertainment due to its reliance on audience-based live performances to generate a good portion of its revenue. While some adjustments have been made to fill this void, the live music industry as a whole is still at a standstill, particularly in Ontario, which has seen cycles of lockdown orders as late as May 2021. This disruption of income streams creates a significant financial strain on music businesses who need to meet rent and pay employees, as well as musicians themselves who derive a part of their income from performances. While there are many provincial and national relief funds available for music industry stakeholders, work needs to be done to ensure these resources remain available for the duration of the economic shutdown and that initiatives are being put into place to prepare for the slow return to a ‘new normal’, whatever that may be. Currently, the only official funding source for the music industry is the City Enrichment Fund, which categorizes music under the general ‘arts’ tier and has not allocated any COVID-specific funding.

Recovery initiatives should be grouped into three timelines: immediate, medium-term and long-term initiatives:

Immediate Many initiatives have and will primarily focus on funding. Hamilton’s artists and music industry stakeholders need support to ensure they are meeting basic living costs such as rent, utilities, groceries and medical care. If they are unable to maintain themselves, they will be forced to find a job in a different industry and be further pulled away from the time and freedom to create, perhaps not even returning once the opportunity does arise. Hamilton’s Creative Industries and Cultural Development is doing a great job of maintaining a list⁴⁰⁵ of resources available to them, including provincial and national funding programmes and mental health services. The Hamilton Chamber of Commerce also hosts a list of resources for musicians on their website.⁴⁰⁶ The two should be combined or linked to each other in order to make it easier for site visitors to find (currently only the general business assistance Commerce page is linked on the Music & Film Office page).

⁴⁰⁵ City of Hamilton (2021u)

⁴⁰⁶ Hamilton Chamber of Commerce (2021)

Medium-term items would include toolkits and guides, many of which are available on the Music in Hamilton webpage, to include a safe reopening guide for venues⁴⁰⁷. Professional development resources are also listed, although these can be expanded to include general business skills which self-taught artists and entrepreneurs may not be aware of, to include: bookkeeping and budgeting, taxes for self-employed people, copyright and intellectual property, beginner's contract law and more. This forced downtime is an opportunity for artists to boost their knowledge into a more well-rounded skill set.

Long-term work will turn the focus back to funding. Creating a dedicated city fund to help issue small business loans or professional development grants (for costs such as recording, promotion, workshops or touring costs) will help rebuild and sustain the music industry while it finds its feet in the post-pandemic economy. Hamilton has been doing a great job in supporting its artists as much as it can given the economic shutdowns; providing resources in a clear and concise manner; and organizing socially distanced virtual events where possible. The city must carry on this work and begin to look towards building the support structures for when its economy reopens. As part of this, it is important to pay particular attention to Indigenous and minority musicians and make sure their voices are heard among the great rush when things do begin to open up again. Holding community roundtables, either virtual or in person, will provide data to assess the needs of the music community, from there developing dedicated grants to address those needs and continuing to heavily promote music through local media and social media channels while live music events are still restricted are all productive means of support.. This will help champion and protect Hamilton's music heritage while simultaneously facilitating opportunities for all of the city's artists and professionals.

⁴⁰⁷ City of Hamilton (2020b)

SHOWCASE BC – British Columbia, Canada⁴⁰⁸

What Is It: Showcase BC provides microgrants between CAD\$500 to \$2,000 to artists in need of financial support for live streaming, songwriting or professional development activities. The programme is open to both emerging and established artists that have been active in the music industry in the 12 months preceding their submission and that have previously applied to (but not necessarily received funding through) an Amplify BC programme, such as the Career Development programme, Music BC's Artists Travel Grants programme or the First Peoples' Cultural Council's Indigenous Music Initiative. Because of this latter element, Creative BC reached out directly to eligible applicants to invite them to apply. Artists who receive Showcase funding are required to create an event listing on the provincial events calendar, showcasebc.ca.

Who is responsible: The programme is funded by the Province of British Columbia and administered by Creative BC.

What has it done: A total of CAD\$623,000 was dispersed across 742 projects in the 2019-2020 rotation. Recipients ranged in career stages, from local acts to those who have achieved international recognition, such as Marianas Trench.⁴⁰⁹ In addition, throughout the pandemic, Showcase BC has contributed relief funding for artists.

Lesson for Hamilton: Microgrants can go a long way towards getting projects off the ground, from travel costs for seminars and shows to the purchase of new recording equipment as more artists transition towards digital performing. A micro-grant programme such as this one can help fulfill short-term needs such as the above-mentioned equipment purchase or even more immediate needs such as utilities and rent, but it can also transition into a great long-term programme, kept as emergency funding or as micro-grants for music development activities (or both).

⁴⁰⁸ Creative BC (2021b)

⁴⁰⁹ Creative BC (2020)

TEXAS ACCOUNTANTS AND LAWYERS FOR THE ARTS - Statewide, Texas⁴¹⁰

What Is It: Since 1979, Texas Accountants and Lawyers for the Arts (TALA) has been helping artists and arts-based non-profit organizations by providing pro bono services in accounting, patents, dispute resolutions and educational programming. In doing so, they hope to help artists protect their intellectual property and build on and protect their income streams.

Who is responsible: TALA is a 501(c)(3) charitable organization, and all registered accountants and lawyers are volunteers. It is managed by a board of directors as well as a small staff consisting of an Executive Director and a Legal Director. All board and staff members are certified accountants or attorneys.

What has it done: TALA volunteers host many seminars and workshops throughout the year, covering topics such as Recording-Keeping Tips for Self-Employed Individuals, The Art of Taxes, Making Sense of the New Blanket Mechanical License, Legal Essentials for Live Streaming and Understanding the Texas Sales Tax.⁴¹¹ In light of the COVID-19 pandemic, TALA waived membership fees for those needing to access legal or financial advice.⁴¹²

Lesson for Hamilton: Not all aid needs to be fiscal; in-kind support can also help artists exponentially both immediately and further down the line. Because most musicians are self-taught, they often don't look at their music as a business until it is undeniably a strong income stream, but the earlier they can manage this the sooner it will pay off, and the less likely they are to be taken advantage of by more established professionals or organizations seeking to help them advance their careers.

Recommendation 21: Create a Funding Pool from Existing Revenue Streams (Hotel Tax)

Builds on: G

Timeline: Medium-term (1-2 years)

⁴¹⁰ Texas Accountants and Lawyers for the Arts (2021b)

⁴¹¹ Texas Accountants and Lawyers for the Arts (2021c)

⁴¹² Texas Accountants and Lawyers for the Arts (2021d)

In 2017, the Hospitality Hamilton Partner Steering Committee discussed the introduction of a hotel surcharge through their partnership with Tourism Hamilton and the Ontario Restaurant, Hotel and Motel Association, with proposed revenue going towards promoting the conference and conventions business.⁴¹³ Participation is voluntary, and according to the latest data available the 3% tax is expected to generate \$1 million each year from the initial six participating hotels alone. This proposition was followed in 2020 by a recommendation to the Mayor to implement a Municipal Accommodation Tax. The recommendation, which was drafted by the Planning and Economic Development Department's Director of Tourism and Culture, called for a 4% tax to be added to hotel stays, citing the 2017 passage of a provincial regulation which allows municipalities to apply such a tax if desired.⁴¹⁴ The supplemental document estimates that the 4% tax would create \$2 million in annual revenue through existing hotels, and a total \$3 million in annual revenue once slated hotels are finished and operational. Hamilton already enacts a 3% Destination Marketing Fee on overnight stays, which generates approximately \$800,000 per year for the local tourism industry, although the new Municipal Accommodation Tax would overwrite the existing fees in order to maintain affordability for consumers.

According to the provincial law, this revenue must go towards a non-profit tourism organization to be spent on destination marketing and tourism efforts. By cementing the local music industry as a driver of tourism and placemaking, Hamilton may use a portion of this money towards promoting its local artists and industry. Such funds could greatly assist with initiatives such as cross-industry promotion (see recommendation 17), the incorporation of music into local infrastructure via signage and public performances (see recommendation 18) and the creation of a music export programme (see recommendation 19). As with any branding strategy, advertising and promotion will be a major cost of communicating and establishing Hamilton as a music city, and the Municipal Accommodation Tax can help alleviate this.

⁴¹³ Craggs (2017)

⁴¹⁴ Brooks-Joiner (2020)

Hotel Tax Funding⁴¹⁵ – San Francisco, CA

What Is It: In 2018, San Francisco passed Proposition E, a bill that mandates a portion of the city's hotel tax be used for artistic and cultural enterprises. Hotel taxes amount to 14% of the room rate, composed of an 8% base tax and a 6% tax surcharge. Before the bill, the revenue fed into a General Fund, the distribution of which was determined by the Board of Supervisors. Proposition E set aside 1.5% of the 8% base tax for arts and culture (the remaining 6.5% would keep funneling into the General Fund). Projected revenue from the measure is split in several ways:

- \$16.3 million to arts grants
- \$6.4 million to a cultural equity endowment
- \$3.8 million to cultural centers
- \$3 million to cultural districts
- \$2.5 million to needs in the arts community
- Additional funds for refunding overpayments

The measure was passed with a 75% favourable vote.

Who Is Responsible: San Franciscans for the Arts lead the support campaign. Revenue collection and distribution is overseen by the City of San Francisco's Office of the Controller.

What Has It Done: While the proposition is still fairly new, the city has seen effects already. 2020's dramatic drop in hotel occupancy meant tax revenue was also down, \$12.8 million in grants were announced in August to be dispersed across 227 organizations.⁴¹⁶ Major organizations, such as the San Francisco Ballet and the San Francisco Opera, have thus far received the largest portion of the tax-generated revenue, but 2020 saw smaller, community-focused entities such as the Juneteenth Celebration and the Transgender Film Festival increase their share of the funds. The city strove to take a closer look at racial and ethnic equity, a need that was emphasized due to the disproportionate effects Covid-19 had on minority communities.

Lesson for Hamilton: Municipal taxes are a great way to generate funding for arts and cultural purposes at a relatively low cost to residents, many of whom are happy to see the money go towards the cause, if the voter decisions of the above measure

⁴¹⁵ Ballotpedia (2018)

⁴¹⁶ Veltman, Chloe (2020)

and other similar measures across the country are anything to go by (see San Francisco's Proposition E⁴¹⁷ and the Scientific and Cultural Facilities District in Denver.⁴¹⁸ There are many avenues to apply this, from a hotel occupancy tax to property taxes or a sales tax.

4.5 Recommendation Timeline

	Year 1	Year 2	Year 3
City Policy and Supportive Infrastructure			
1. Investigate/Define the Role of a Music Officer Position			
2. Review Music in Hamilton Webpage			
3. Conduct Periodic Audits of the Local Industry			
4. Advocate for Friendlier Noise Ordinances			
5. Review Agent of Change Policy			
6. Create an Artist Compensation Policy			
7. PromoteThe City's Busking Policy			
8. Maximize Spaces Around the City			
9. Improve Transportation Around Local Shows			
Talent and Professional Development			

⁴¹⁷ Veltman (2018)

⁴¹⁸ Brown (2016)

10. Create a Working Group for Minority and Indigenous Musicians						
11. Advocate for Incentive Schemes for Music Businesses and Projects						
12. Create a Series of Professional Development Resources						
13. Support Accelerator and Incubator Programmes						
14. Implement Affordable Housing and Creative Space Opportunities						
15. Create a Music Industry Jobs Board						
16. Expand Access to Music Industry Internships and Apprenticeships						
Music Tourism and Branding						
17. Promote Local Music amongst Visitors, Young Professionals, Locals						
18. Create a Music Destination Campaign						
19. Organize a Music Export Programme						
COVID-19 Recovery and Long-term Funding						
20. Extend and Expand Existing Investment and Recovery Plans						
21. Create a Funding Pool from Existing Revenue Streams (Hotel Tax)						

Short-term (0-12 months)	
Medium-term (1-2 years)	
Long-term (2+ years)	

5. Conclusion

Hamilton's early work in music policy laid a strong foundation to make it an innovative and supportive city for growing and nurturing talent. The challenge now lies in defining the strengths and uniqueness of Hamilton's music offering to set itself apart from nearby competitors such as London as well as industry hubs such as Toronto and New York City. Additionally, there is an opportunity to directly address the concerns of Hamilton's radius clause by making it a year-round tour stop as well as an attractive place for artists to reside, thus retaining their cultural contributions during the 'off-season'.

Much of this objective lies in branding and marketing Hamilton as a music destination for fans and creatives alike. Of course, it's important to maintain infrastructure which supports that claim, such as strong programming, music-friendly noise and licensing policies and affordable housing and business costs. There is a large opportunity in professional development initiatives which can be addressed even in light of ongoing COVID-19 restrictions. Education and skills resources are vital to not only strengthening the existing industry, but in building a well-rounded and sustainable next generation of artists and professionals, driving scaleable and feasible growth that will define Hamilton as a welcoming and opportunity-filled city for musicians and music industry stakeholders.

The long-term effects of the COVID-19 pandemic are still unknown, but they must be acknowledged first and foremost. Recovery work is a top priority, as it is the most immediate need, and Hamilton must understand that it is no longer creating a strategy built off of the stopping point of the old strategy. It is building Hamilton's music scene back up to its 'new normal' in order to then launch its envisioned future.

Hamilton's music industry is set to thrive, because it has one of the most valuable assets working for it: a city that is consistently looking for ways to provide more support to its music industry and involve itself in support mechanisms and communication. As the Music Cities movement grows, Hamilton will continue to provide an example to smaller cities around the world looking to maximise their local industries in order to help musicians, music professionals, fans and their local economies.

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Any opinions, findings, conclusions or recommendations expressed in this material are those of the author and do not necessarily reflect the views of Ontario Creates or the Government of Ontario. The Government of Ontario and its agencies are in no way bound by the recommendations contained in this document.



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Sonic Unyon Records

From the beginning, Sonic Unyon Records' mandate has been to foster awareness of undiscovered musical talent while offering artists a chance to become independently successful. The company hoped to fill a gap they perceived in their musical community, a gap that could previously only be bridged by an independent artist's leap to a major label. Since its creation more than two decades ago, Sonic Unyon has taken part in numerous releases, business ventures (Sonic Unyon Distribution, Labwork Music, Goodfellow Records) and partnerships in the Ontario music industry (Rocket Science PR). The company continues to operate the record label, while diversifying with growth into the live and management sector.

City of Hamilton - Tourism and Culture Division

The City of Hamilton – Tourism and Culture Division supports the City's heritage, culture, arts and tourism. As part of this mandate, T&C oversee the Hamilton Music Strategy, which celebrates "all things music" in Hamilton. The Strategy nurtures an environment where music and the music industry can flourish, grow and prosper. The success of Hamilton's Music Strategy depends on multiple partners working together to realize a common vision. The City of Hamilton, the local music industry and Hamilton's musicians have significant yet different roles in implementing the Strategy.

Hamilton Music Advisory Team

The Hamilton Music Advisory Team (HMAT) is a group of local music industry representatives from musicians; multicultural music genres/origins; venues; youth; music education; industry representation – managers, event organizers, record labels, promoters, recording studios; not for profit/support industries; festivals/events (outside of venues) who assist with the City's Music Strategy.

Hamilton Chamber of Commerce

Since its inception in 1845, the Hamilton Chamber of Commerce has served as an anchor institution and the definitive voice of the local business community. Throughout its history, the Chamber has played an important role in bringing together business and community leaders to advocate at all levels of government for policies that further enhance the social and economic prosperity of our city. The Chamber's Advocacy efforts are reflective of the priorities of our membership and wider business community, further developed through professional expertise of volunteers on our Policy and Advocacy Council and finally, implemented by Chamber staff through their day to day engagement with Governments and the wider Chamber of Commerce network in Canada.

Hamilton Public Library

Hamilton Public Library (HPL) is a proud supporter of Hamilton's vibrant music scene, which is filled with a pool of emerging and established talent. From singer-songwriters, producers to sound engineers, Hamilton is booming with musical energy. HPL is committed to help preserve, promote and strengthen music in and across our city - everywhere we live, work and play. We look forward to collaborating with Hamilton City of Music to celebrate the City's rich musical history and highlight all that Hamilton's music community has to offer.

Supercrawl Productions

Supercrawl Productions is a not-for-profit organization that presents year-round multi-art events culminating in the annual Supercrawl festival on James Street in Hamilton, Ontario on the second weekend of September each year. The festival now showcases an entire street of cultural experiences over a full three-day weekend - a diverse dynamic lineup of music, art, fashion, theatre, performances, talks, crafts, food and fun to over 250,000 people, and year-round programming includes concerts, community events, fashion shows, literary presentations and public art installations, with an economic impact exceeding \$20.5M (TREIM) yearly. Since its inception, Supercrawl has showcased more than 1,500 musicians, artists and creators from throughout the local area, across Canada, and around the world, attracting a net attendance of nearly 1.5M.

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