

ANNUAL REPORT 2015 - 2016



**MUSIC
CANADA
LIVE**

The voice of live
music in Canada

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Behind the People Behind Live Music: Music Canada Live

The first full year of the association was extraordinary in many ways. Services and activities increased, membership grew, knowledge and awareness of the existence and efforts of the organization spread. This report seeks to capture the highlights of the 2015-16 fiscal year.

2015-16 Accomplishments

Live Music Measures Up, An Historic Contribution

Music Canada created and led this ground-breaking study, released in December, 2015. Since the project began before the actual inception of Music Canada Live, it was an early priority for the association once it was up and running. With thanks to funding support from the Ontario Music Fund requested by Music Canada, “Live Music Measures Up: An Economic Impact Analysis of Live Music in Ontario” has had a substantial impact on the way governments and others now view the economic role of the industry. The report is the first comprehensive study of its kind, providing key metrics and compelling statistics, as well as highlighting tourism impacts which themselves have opened doors to multiple other essential municipal, provincial and federal policy discussions.

The results of Live Music Measures Up profoundly demonstrate the economic importance of live music across the province and signal major potential for other regions. Music Canada Live continues to harness the data to entrench the economic value and power of live music - in Ontario and across the country.

This study demonstrates the very real need for the industry to tell a truly comprehensive, national economic story, and steps are being taken to advance the notion of a Canadian live music economic impact study.

Music Canada Live was pleased to be a partner to Music Canada on this project.

The Inaugural Live Music Industry Awards

Music Canada Live partnered with Canadian Music Week (CMW) to support the development and delivery of the first-ever Live Music Industry Awards in the spring of 2016.

Music Canada Live's members were integral to the program's success, providing feedback on the criteria and priorities that would shape the first incarnation of this wonderful celebration of the people behind live music.

CMW initiated the Live Music Industry Awards, with 29 award categories, in 2015. The awards boasted a total of 133 nominees from across the country including an impressive selection of live music greats - for and non-profit, big and small, rural and urban.

On May 7th during CMW, the sold-out Live Music Industry Awards brunch was held to applaud live music's contribution to the music industry, as well as cultural, landscape of Canada. Many members attended the awards, which were followed by a Music Canada Live member appreciation reception.

The 2017 awards program is already in development with some exciting new components and opportunities for members.



Jeff Cohen and Damian Abraham co-host the 1st ever Canadian Live Music Industry Awards.

Panels, Conferences, Key Meetings

Music Canada Live convened, participated in and/or had a presence at many industry events and/or key meetings during the 2015-16 year. The goals of participation included raising awareness of the mandate and importance of the association, recruiting new members, celebrating members and their achievements, championing the music cities research, bringing expert leadership and knowledge to professional development learning opportunities, meeting with local stakeholders, assessing local challenges, and developing regional advisory councils, key partnerships and collaborations in cities across Canada.

Conference/Meeting	Activity
<ul style="list-style-type: none"> • Halifax RAC/Music Cities Meetings • Ottawa live music sector meeting • Ontario music offices meeting • Western Roots Artistic Directors annual meeting • Breakout West • M pour Montreal • Mundial Montreal • Canadian Music Week • Folk Alliance • Juno Awards • ECMW • CMW • Folk Music Ontario • Halifax Pop Explosion • MEGAPHONO • SXSW • Guelph Chamber of Commerce Tourism Event • Canadian Event Safety Alli- 	<ul style="list-style-type: none"> • Participated/had presence at industry events, on panels, etc. championing local and regional live music stakeholders; sponsoring awards and celebrating the achievements of local industry • Regular speaker at industry meetings, etc. talking about the value of live music • Hosted several networking events and meetings for members including a member's event during CMW • MCL reached over 400 live music stakeholders across Canada through these activities • Membership increased by 64%

Ontario Live Music Collaborative Marketing Initiative (OLMMI)

The Ontario Live Music Working Group is a Ministry of Tourism, Culture and Sport industry working group, convened to support the Province of Ontario in helping to develop a Live Music Strategy. It is co-chaired by MCL Executive Director Erin Benjamin and Assistant Deputy Minister, Kevin Finnerty. The working group's Outreach and Collaboration sub committee, chaired by Quentin Burgess (Music Canada) and Jesse Kumagai (The Corporation of Massey Hall and Roy Thomson Hall) developed this pilot project to help meet the priorities of the provincial government. Music Canada Live, in partnership with the co-chairs of the sub committee have lead and administered the project to-date.

The objective of the pilot is to link live music event producers in Ontario with stakeholders in the tourism promotion sector (incl. government) with the aim of using the attraction of music events to stimulate in-bound tourism in Ontario (thereby leading to growth in the Ontario's live music sector).

The Goals of the program are as follows:

- Drive music tourism and position Ontario as a premier global destination for live-music and music tourism
- Support the use of the OntarioLiveMusic.ca live music portal and promote Ontario's live music sector to boost concert attendance, visitor spending, and economic impact
- Collaborate, develop and grow Ontario's live music industry
- Foster grassroots development and expand live music opportunities for musicians to perform and thrive in Ontario by building new audiences from other markets .

Currently, a marketing and business plan is being developed by Nordicity, with support from the Ontario MusiFund, to clarify issues including:

- A revenue model for the initiative (with an eye towards sustainability);
- A clear articulation of the initiative's objectives
- A summary of the key performance indicators (KPIs) that the initiative will need to collect (and report on), as related to the Initiatives objectives;
- An execution plan (i.e., how the initiative will actually get done, including timelines, division of responsibilities, how various KPIs will be collected, etc.);
- A marketing approach to attract additional partners/funders to the project (which will be linked to the revenue model).

The project is slated to be delivered in 2017, with plans to develop it in other provinces and regions. This is an exciting step for the live music industry, and idea whose time has come.

Regional Advisory Council Program

Launched via online and B2B efforts in October 2015, the Regional Advisory Council (RAC) program was promoted at industry events, engaging potential members one on one. The program quickly was identified as a significant benefit for members and proved to be a key engagement tool for the association throughout the 2015-16 year.

A Terms of Reference was crafted and disseminated, highlighting the key priorities for the program. The priorities for the program include the evaluation and examination of issues such as: immigration and taxation, funding models, licensing and bylaws and other non-competitive topics that directly impact live music in the respective region. The councils are chaired by both a non-profit and for profit chair in each region.

Swiftly and as a result of expressed desire from members, Music Canada live placed key stakeholders in leadership positions of three councils; Ottawa, British Columbia, and Quebec. Shortly thereafter in March 2015, an Atlantic Canada RAC was launched after several months of strategic outreach, consultation with co-chairs, other participants of the program, and local key live music stakeholders.

For the first year of the active program, led by the Networking and Outreach Manager Lara Farcasan, participants consist of members and non-members alike to engage a larger percentage of the live music industry and to demonstrate value in the work of the association as well as importance of the mandate.

Examples of what Music Canada Live has accomplished via the Regional Advisory Council has achieved in the 2015-16 year:

- | | |
|------------|--|
| Ontario | <ul style="list-style-type: none"> • Convened major meeting of Music Offices of Ontario during CMW w/ 24 municipal ities and music offices attending/meeting for the first time in partnership with the Toronto Music Advisory Council (TMAC) • London: Provided regular, ongoing strategic support to City of London Music Office. • Hamilton: Met w/ City of Hamilton and 20 local live music stakeholders; supporting effort to create a Music Strategy and venues association for the city • Sudbury: Meeting regularly with Tourism and Economic Development to grow regional partnerships and identify opportunities for partnership |
| Ottawa RAC | <ul style="list-style-type: none"> • Convened local in-person meeting in partnership with the Ottawa Music Industry Coalition and Ottawa Sports and Entertainment Group; 25 stakeholders attended • Dialogue ongoing, building into 2017 Juno's and future development of OMIC • Upcoming noise bylaw review • Concentration on venue assets and limitations |

- Toronto
 - Regular interaction with City of Toronto and live music stakeholders on a variety of issues including
 - Noise bylaw review
 - Postering issue
 - Austin/Toronto Alliance Summit
- Atlantic Canada
 - Met with local stakeholder's multiple times to advance local and regional conversations;
 - Building partnership with municipalities, tourism and economic development organizations, Event Atlantic and others
 - Supporting the creation of an Atlantic Canadian SWOT analysis of the music industry in partnership with Music Canada
- BC RAC
 - Supported Music Canada in the development of BC's Music Industry: From Adversity to Opportunity – ensuring live music stakeholders participated in the consultations that helped leverage the BC Music Fund
 - Brought together 15+ live music leadership (for and non-for profit) immediately following the announcement of the fund to engage in the development of key messaging for the advisory council of the fund, to help ensure the priorities of the live sector are reflected in programming and investment in year-one, and to help ensure strong measurable for renewal of the program
- All Regions
 - Regularly solicit feedback, input and survey RAC's to help make informed decisions on policy and programs; convene meetings, monitor local trends and issues

Austin Toronto Music Business Trade Summit

Music Canada Live was contracted to produce the Austin/Toronto Music Business Trade Summit in late 2015 by the Austin-Toronto Music Industry Alliance.

Working closely with the Austin-Toronto Music Industry Alliance and the City of Toronto, Music Canada Live hosted 26 Toronto Delegates as well as 22 Austin Music Stakeholders at the Ontario Investment and Trade centre on June 14-15, 2016.

The Summit was an inclusive B2B experience curated by Austin co-chairs Lisa Hickey and Nikki Rowling, programming gave participants from all leadership facets of the music industry in both cities the opportunity to connect on a 1:1 level as well as share better practises and situational analysis from the two cities.

Austin participants arrived in Toronto via group travel arrangements including flights, ground transport and hotel accommodations facilitated by the Sheraton Centre Hotel as well as YYZ Travel coordinated by Music Canada Live. The Association also oversaw the execution of all administrative and expense coordination as well as communications and logistics via the Networking and Outreach Manager.

The exercise was impactful, providing Music Canada Live with increased awareness amongst industry stakeholders, helped to cultivate new memberships and place the association in the centre of live music dialogue between the two cities and beyond.



The Austin-Toronto Music Industry Alliance Business Trade Summit

Best Practices Tool Kit

Music Canada Live members are eager to learn from their peers, as clearly stated by those interviewed during the national consultations held in 2014 that led to the development of the current strategic plan. Throughout the 2015 year, the association continued to work to determine how it could best serve potential members by helping them connect to the common knowledge that might not be so common to some operating within the same ecosystem.

The Best Practices Tool Kit was initiated in Winter 2016, with an aim to developing best practices based on topics that impact day to day operations without influencing the competitive nature of the industry.

The live music industry is robust in terms of experts and senior leadership but not every live music entity has the infrastructure or capacity for developing best practises in the face of fast-paced day to day operations. Even still, many organizations may execute best practises on an ongoing basis but those better or smart practises had yet to be committed to paper, let alone referenced or shared throughout the sector.

With thanks to support from the Ontario Music Fund, Music Canada Live was able to contract Ian Swain, a highly-skilled academic researcher, to create two complete documents that would kick start the toolkit in response to industry interest:

1. Making sponsorships and partnerships work
2. Sounding proofing and noise mitigation

The research is being made available to members of Music Canada Live, and is in direct response to the mandate of the association in terms of providing relevant, timely business development. Each best practice is a living document which can be updated with new information as necessary so they remain relevant and fresh, as practical, tangible tools for the field. Best practices spur innovation, foster peer-to-peer sharing and lead to positive change in the music industry at large.

Music Canada Live's best practises are available to members only.

Measurable Success, Conservative Growth: Team Building

Music Canada Live expanded its team to include two new, small but vital contract positions this year. Tenille Goodspeed, coming from Halifax to Toronto, supports Music Canada Live on various communications initiatives including the Music Canada Live Newsletter, social media and more in the role of Marketing and Communications Coordinator.

Rosalyn Dennett joined Music Canada Live team as Data Coordinator, supporting the data management for Music Canada Live as well as other administrative initiatives.

In addition to our new team members, Lara Farcasan, whose title changed to Networking and Outreach Manager, continues to manage many of Music Canada Live's programs including the Regional Advisory Councils and Celebrate Live, overseeing and implementing administrative infrastructure as well as planning and executing all Music Canada Live events.

Financial resources for these part-time project positions are 75% funded through the Ontario Music Fund activities and enable the association to advance its mandate and deliver programs and services to members.



Our members: Ticketmaster, Indie Montreal and the National Arts Centre at Le Festival d'été

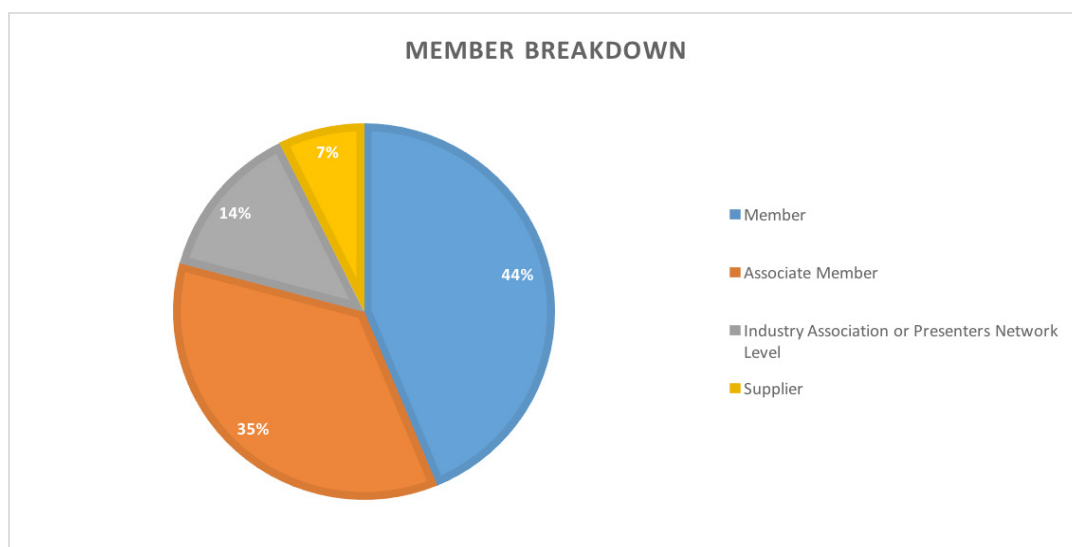
Membership

From the time of our last Annual Report, Music Canada Live has gone from 35 members to 100 -- over double the amount of members from when the organization began in 2015.



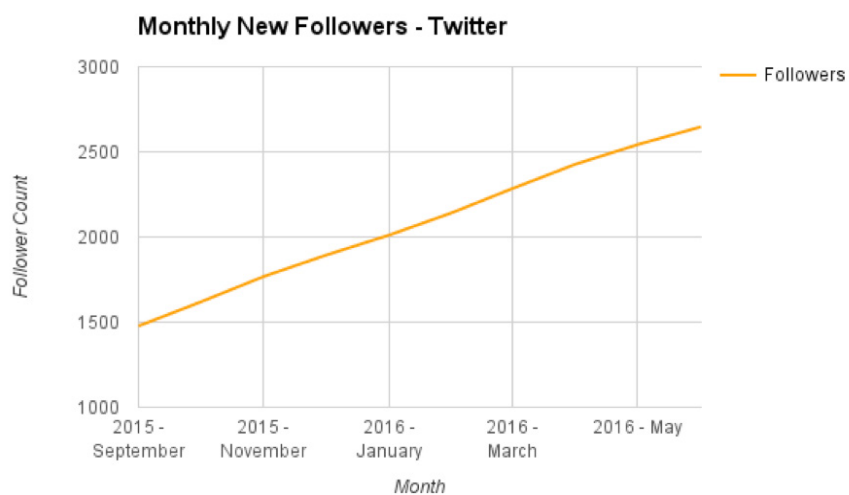
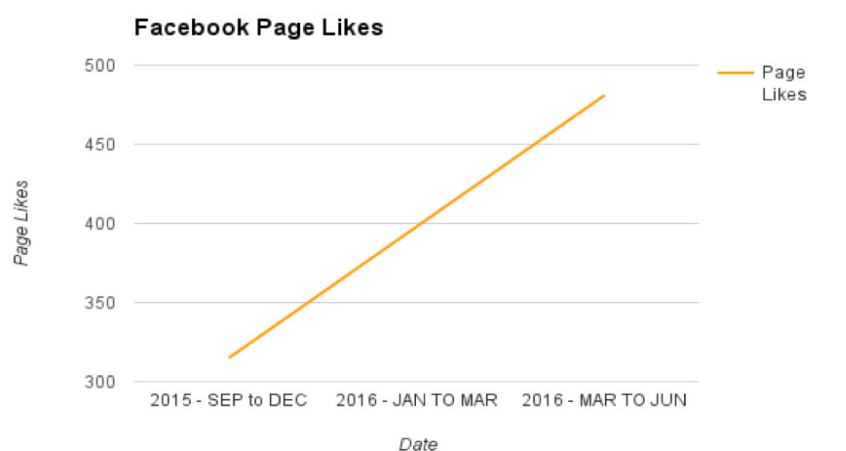
Passionate People: Our Members

Our members aren't just the lifeblood of this organisation, they are the heartbeat of this country. From independent concert promoters to small clubs in cities and towns across from coast to coast to coast. We are companies that fuel our economy, we are agents who represent the artists who inspire us, we are festivals that put Canada on the international map as a global destination for live music. Together we contribute the social, cultural and economic backdrop of Canada.



Community Engagement

Since this time last year, Music Canada Live’s online presence has seen steady growth. It celebrates live music through the voices of our venues, festivals, agents, and suppliers. MCL plans to continue this support, and will be working to add our own voice to the mix.



Investing in an Important Idea: Financial Accountability

The 2015-16 financial review is available as a separate document. The year ended in deficit which, while forecast, demonstrates the need for this new association to continue to work doggedly to demonstrate high-value, raise awareness of its mandate, create wins for the sector as it has done, and encourage participation from new members and stakeholders.

The challenge remains that the only two sources of revenue available at this time are i. grant funding (currently from the OMDC via the OMF only, as no federal programs exist where the association would be eligible at this time) and ii. membership revenue. The membership fees were structured to be highly accessible to the vast majority of live music stakeholders, and while targets are realistic and growth is steady, the dues amounts are small and Music Canada Live therefore requires a substantial number of members, to both join and continue to renew, to offset operational costs. Grant revenue is project-specific, meaning core operating costs are typically not eligible, with the exception of small administration fee percentages.

The OMF is a great resource to drive programs, investing up to 75%. In order for Music Canada Live to experience continued growth in program delivery the other 25% needs to be driven by earned revenue.

The business model and approach the organization is taking has been proven by many other associations, both in and outside of the music industry. However, it is Music Canada Live's intention to be as self-sustaining as possible, with limited reliance on grants. The industry's support is required to keep the organization effective. In these early days, staff and board continue to build the framework to attract corporate sponsors with similar values and priorities, additional funders, as well as new opportunities for government partnerships to ensure the critical work of the association – the voice for live music in Canada – develops its capacity and guarantees the industry's priorities are front and centre of every decision and action taken.

The association requires full support from its members and supporters to continue to invest in the idea that the live music industry benefits from a united, strong, comprehensive voice. A commitment to the concept that both the bottom line of individual companies, and the big sectoral picture, will grow to benefit the industry, artists, fans and the country as a whole.

Board and staff continue to work vigorously to identify, build and maintain sustainable sources of revenue, as well as invest in key partnerships and collaborations.

Going Forward

In the 2016-2017 year, Music Canada Live will:

- Continue to develop and administer programs and activities deemed priorities by its member base such as:
 - o Best/smart practices
 - o Networking
 - o Professional Development
 - o Advocacy
- Elevate the association's and live music's profile via a comprehensive publicity effort, underlining and underscoring Music Canada Live as the voice of the live music sector
- Continue to activate and convene Regional Advisory Council's across Canada
- Ensure more and enhanced activity in all provinces and regions
- Diversify and implement Music Canada Live branded networking and business development activities and events

Advocacy Goals

In addition to specific provincial targets, in 2016-2017, Music Canada Live will continue to champion the following:

- A federal investment strategy that supports and includes the commercial concert industry
- A federal live music strategy
- A robust national tourism strategy that prioritizes and leverages the value and power of live music in cities and towns across Canada
- A national live music economic impact study to benchmark growth vis-a-vis the federal governments cultural policy objectives
- The constitution of a federal committee dedicated to examining the health and well-being of Canada's venues, able to make and act on recommendations in concert with the industry to ensure its long-term sustainability

2015-2016 Board Committees

Executive Committee

Chair, Jesse Kumagai*
 Vice-Chairs, Nick Farkas, Jeff Cohen
 Treasurer, Deane Cameron
 Secretary, Jean Wilkinson

*The Board Chair is a member of all committees.

Advocacy Committee

Chair, Amy Terrill
 Nick Farkas
 Jean Wilkinson
 Patti-Anne Tarlton

Finance and Audit Committee

Chair, Deane Cameron
 Graham Henderson
 Brian Ohl

Nominations and Governance

Committee
 Chair, Jesse Kumagai
 Stan Dunford
 Tom Kemp
 Patti-Anne Tarlton

Membership Committee

Chair, Jeff Cohen
 Tom Kemp
 Neill Dixon

Communications Committee

Chair, Nick Farkas
 Amy Terrill
 Melissa Bubb-Clarke
 Patti-Anne Tarlton
 Michael Hollett

With Our Thanks

Sincere thanks to the partners, supporters, funders and especially to you - our members, for standing together and building a strong, united voice for Canada's live music industry. Special thanks to our family at Music Canada, our colleagues at the Ontario Music Fund and the Ministry of Tourism, Culture and Sport, Melissa Bubb-Clarke and our founding Board of Directors without whom we would not be here today.

The Board of Directors are volunteers and their contribution to both the association and the field is extensive.

Our Founders:

Neill Dixon,
Canadian Music Week
 Jeff Cohen,
Collective Concerts
 Nick Farkas,
Evenko
 Brian Ohl,
Global Spectrum
 Riley O'Connor, Erik Hoffman,
Live Nation
 Graham Henderson, Amy Terrill,
Music Canada

Michael Hollett,
NXNE
 Stan Dunford,
Republic Live
 Deane Cameron, Jesse Kumagai,
The Corporation of Massey Hall and Roy Thomson Hall
 Tom Kemp,
The Feldman Agency
 Patti-Anne Tarleton,
Ticketmaster
 Jack Ross, Jean Wilkinson,
United Talent Agency

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