



FERTILE GROUND

Alberta Music Cities Initiative

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 NationalMusicCentre  @nmc_canada  Music Canada  @Music_Canada

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EXECUTIVE SUMMARY

Calgary, home to the National Music Centre, and Edmonton, together present the largest urban centre in Western Canada. They are growing, young, affluent communities.

Alberta has long been a destination for young people from other parts of the country looking for employment opportunities. A resource-based economy, Alberta consistently delivers strong job growth, so much so that the province cannot keep up with the demand for skilled workers.

And yet, Alberta's reliance on resource industries concerns leaders at the highest level. Economic diversification is a high priority. Investments have been made in agriculture, forestry, high tech, and expanding tourism strategies. Cultural industries have also been identified as potential areas of growth.

Evidence shows that music, when harnessed, has the power to accelerate expansion across a variety of sectors. A vibrant music scene attracts the young, affluent workers other industries desperately need. Music is a prime motivator for travelers. And music underpins other cultural and media applications.

Led by the National Music Centre (NMC), Alberta is poised to capture the power of music in a way never before realized from Western Canada. NMC will be transformational to the music community in Alberta. How do we ensure the music community is

equipped to respond and ready to take advantage of the opportunity?

This Alberta Music Cities Initiative (AMCI) will build on the strong foundation present in Alberta – in live and recorded music – concurrently with the construction of NMC so that when NMC opens it will be the centre of a healthy, diversified sector brimming with talent and excitement.

The AMCI was developed while keeping in mind key national priorities for the development of music as well as current strategic directions of agencies and commissions in Alberta including Alberta's Cultural Industries Division, Calgary Arts Development Authority, Edmonton Arts Council, and The Banff Centre. This is the right time for a coordinated, collaborative focus on music in Alberta.

Contained in four key strategies, the AMCI will begin with gathering important information about the music sector in order to better understand Alberta's music story, including the strengths and weaknesses. Armed with relevant and current data, the AMCI will launch into an awareness and education campaign to demonstrate the value of music. The third strategy will strengthen the music ecosystem in Alberta so that artists can be better supported in every stage of their career. And finally, the AMCI will develop a live music strategy and music tourism initiative.

RECOMMENDATIONS:

- 1** Develop a comprehensive understanding of the economic profile of Alberta's music cluster with regional breakouts for Calgary and Edmonton as well as other smaller cities as appropriate.
- 2** Position music as a key economic sector and vehicle for diversification of the economy of Alberta and method by which municipalities can stimulate economic growth, increased investment, youth retention and attraction and tourism.
- 3** Develop and implement a strategic plan to build the business capacity of the music industry in Alberta.
- 4** Develop and implement a live music strategy for Alberta in order to improve the live music product offering in Alberta and generate increased music tourism.

INTRODUCTION

The National Music Centre (NMC) will transform the musical landscape in Canada with the opening of its award-winning facility in Calgary in 2016. It will be a catalyst for creation, for celebration and for education. Within its walls, music and music history will come alive and inspire artistic expression; exhibition spaces, studios and performance spaces will engage professional and amateur musicians as well as students of music. It will become a focal point for activity in Western Canada, creating a bridge to the music industry across the country.

Furthermore, NMC has the potential to influence the growth and vibrancy of the community in which it is operating. It will be a hub of activity in Calgary's East Village, an essential part of that area's

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redevelopment and a focal point for community events and activities. It will be a mecca for tourism that will support efforts to diversify Alberta's tourism product offerings. And it will be an important employer and an industry catalyst by developing professionals in the creative and commerce fields of the music sector, creating a vibrant music scene that will draw skilled music industry professionals in search of career and business growth into the province and fuelling additional economic activity and job creation through other industry sectors. By the commercial music sector we mean those whose

The National Music Centre (NMC) will transform the musical landscape in Canada with the opening of its award-winning facility in Calgary in 2016.

livelihood depends on the performance, distribution and sale of music.

Projecting the benefits of NMC beyond the physical space of the facility will build greater community engagement and positively impact NMC's ability to reach its fundraising targets. This will be accomplished by positioning NMC as the hub of a larger music program called the Alberta Music Cities Initiative (AMCI). The AMCI will stimulate the development and promotion of the music community in Alberta and its key urban centres. It will also generate broad community benefits and support numerous parallel community initiatives.

To assist in this effort, Music Canada, a national advocate for initiatives designed to advance Canada's music community, has been engaged by NMC to place it in the broader context of national and provincial goals for music and the larger community. Music Canada is building on an earlier visioning exercise undertaken by The Scotlyn Foundation and the Banff Centre with the participation of numerous creative and commerce sector representatives. That exercise was called the Vibrant Music Sector Development Plan (VMI).



Allied Works Architecture

NATIONAL STRATEGIES FOR MUSIC IN CANADA

A report published in 2013 by Music Canada entitled *The Next Big Bang: A New Direction for Music in Canada*, identified the following five key strategies for the growth and development of the commercial music industry: music education, digital innovation, music tourism, export expansion and interconnected tax credits. In doing so, it placed music in the current context of the digital environment, identifying key trends in consumption, music discovery and the growing importance of live performance to artists' income. In developing the report, Music Canada consulted representatives of the various subsectors of the music economy. The result is a comprehensive survey of the industry that has led to ongoing collaboration and cooperation.

Since publishing *The Next Big Bang*, Music Canada's research has evolved to include music celebration and music's role in city and community building as important areas for further exploration.

Each of the priorities identified in *The Next Big Bang* resonates with the National Music Centre. In fact, it could be said that many of the activities, current and anticipated in the new building, will embody the ideas and principles presented in *The Next Big Bang*. Likewise, these same themes appear in the VMI development plan to varying degrees, and some strategies of key economic factors in Alberta reflect similar objectives as those presented in the report. For that reason, they will be used as a starting point for the development of the AMCI.

The following are the key themes and ideas presented in *The Next Big Bang*, referencing additional information and research that has since come to bear.

MUSIC EDUCATION

A growing body of evidence points to music education as a key tool in training a workforce capable of competing in the digital economy. Numerous studies confirm the link between music education and skills such as critical thinking, spatial reasoning, cognitive development, collaboration and creativity [Music Canada, 2013, p. 23]. This makes it clear that while many of tomorrow's music stars are honing their skills in schools across the country, the benefits of music education apply more generally to all students regardless of whether they plan to pursue a career in music.

A commitment to music education requires leadership, 21st century curriculum, properly trained and resourced teachers, and a program that embraces technological advancements. Yet a survey of schools conducted by the Coalition

for Music Education in 2010 revealed a myriad of deficiencies in music education across the country including a lack of qualified teachers, insufficient class time, under-resourced programs and a limited variety of musical opportunities [Coalition for Music Education in Canada, 2010].

Private sector initiatives like those developed by NMC, MusiCounts and Sistema are making an impact but are no replacement for in-school music education programs.

Research by the Information and Communications Technology Council (ICTC) confirms that ICT workers who are trained in music are better equipped to succeed in their fields [The Information and Communications Technology Council, 2013].

DIGITAL INNOVATION

Adaptation to the digital environment is essential in any strategy for commercial music. The digital landscape has transformed the way creative industries do business with chips continuing to fall. Revenues from the digital market are on a completely different scale than those derived from CDs. According to a study by the Canadian Music Industry Association [Canadian Independent Music Association, 2013], artists earn about 10-thousand dollars a year from music during an estimated 29 hour work week.

Artist activist David Lowery suggests that 99 percent of musicians are barely surviving while 1% are thriving. This is not the utopia that was promised by the internet enthusiasts. Lowery points out that power and wealth are now concentrated in the intermediaries – the technology firms that control access to the distribution system [Lowery, 2012].

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Digital revenues continue to grow in Canada but come nowhere close to replacing the lost income from physical sales. Therefore we are pressed to identify ways to better monetize content.

MUSIC TOURISM

“Arts and culture tourists outspent typical tourists in Ontario at a rate of almost two-to-one [Ontario Arts Council, 2012, p. 5].”

The Canadian Chamber of Commerce has identified Canada's poor performance in the tourism sector as one of our top 10 barriers to competitiveness [The Canadian Chamber of Commerce, February 2014]. Canada is slipping as an international tourism destination according to the Tourism Industry Association of Canada (TIAC), losing ground from the 8th largest international travel market in the world in 2002 to the 18th in 2011 [Tourism Industry Association of Canada]. TIAC has identified marketing, access and product development as key strategies to improve Canada's attraction to international travelers.

Music tourism presents an enormous opportunity to reverse this slide. At a recent hearing of the Canadian Heritage Committee, David Goldstein of the TIAC stated, “Music festivals are one of the most compelling tourism products which spark economic growth in all regions of the country.”

Reports show that arts and culture tourists stay longer and spend more [Ontario Arts Council, 2012] making them a lucrative target market, “Arts and culture tourists outspent typical tourists in Ontario at a rate of almost two-to-one [Ontario Arts Council, 2012, p. 5].” This experience is borne out in Austin, Texas where one half of the annual \$1.6 Billion impact of music is tied to tourism [Music Canada, 2013, p. 43].

Furthermore, the Canadian Tourism Commission (CTC) has identified concerts, festivals and other

music events as a key motivator for youth travelers and is currently in the development of a youth strategy that will leverage existing music events.

The live music community has created an asset in Canada that is waiting to be harnessed. In terms of product development, Canada already has some of the best live music products in the world with significant hotspots including Toronto and Montreal but also a network of festivals across the country. What seems to be missing is a coordinated music tourism strategy, either on the regional or national level.

In Alberta, arts and culture rate highly as priorities of tourists to Calgary as well, with more than 30% of regional travelers and 40% of long-haul travelers citing dining, arts and culture as what they are most interested in doing [Tourism Calgary, December 2013, p. 18]. Improving the concert experience in Alberta will help to meet these consumer demands. The VMI has suggested this can be accomplished through developing a better understanding of audience preferences, developing a strategy for audience renewal and building a memorable social experience [VMI].

Tourism and music professionals each have expertise in marketing, audience development and fan engagement. Tourism leaders in Alberta (for instance Travel Alberta, Tourism Calgary and Edmonton Tourism) and live music presenters (for instance Edmonton and Calgary Folk Festivals, Sled Island, Edmonton Jazz Festival, Interstellar Rodeo and Big Valley) could work together to develop a music tourism strategy. This public-private partnership could mirror the Calgary Sport Tourism Authority, a sport event commission which is mandated through a 20-year plan to develop Calgary into the preeminent sport event destination in Canada. [Tourism Calgary strategic plan 2014-16].



Photo by Rita Taylor / The Banff Centre 2014

EXPORT EXPANSION

Growth of international markets is not only desirable as it pertains to incoming music tourism but also as it applies to the outgoing sale and promotion of music and those who create it.

The growth of international markets for music brings forth many benefits for individual artists and music companies: diversification of revenues, increased press exposure, brand value, attraction and retention of Canadian and international artists, increased sales and distribution, licensing deals and increased streaming revenues [CIMA, 2013, p. 31]. In addition, there is a reputational gain for Canada as our musicians and artists become de facto ambassadors, portraying Canada as culturally diverse and creative. As such, they are an essential part of “Brand Canada”. This in turn positions Canada well for general international investment.

The Next Big Bang recommends a more cohesive national approach to export, with resources earmarked for a national export office and the elimination of regional restrictions on marketing for export which unduly disadvantage the efforts of music companies to promote artists in international markets.

Alberta Music is the primary export development agency for the provincial music community. Its Livestock program provides artists an opportunity to participate in domestic and international showcases and also produces a sample of Alberta Music which is distributed at key conferences and events around the world. In addition, through education and professional development programs, Alberta Music helps artists develop their careers, including assisting them to reach “export ready” status [Alberta Music].

Music Calgary, a non-profit organization formed as part of the legacy of the 2008 JUNO Awards which were hosted in the city, has established a mandate that is similar to Alberta Music. On a city scale, the organization has set out to provide professional development and education to the music community, as well as support for export development. To date it has executed two events designed to increase exposure of Alberta artists to “prominent members of the Canadian and international music industry [Music Calgary].”

INTERCONNECTED TAX CREDITS OR GRANTS

With the example of Canada’s successful approach to film and television production, and specifically the system of tax credits present at the federal and provincial levels, and film strategies at the municipal level, *The Next Big Bang* recommends that a similar approach be taken to attracting foreign direct investment in the sound recording industry.

Industries that make extensive investments in R&D have traditionally been supported by tax credits in Canada and elsewhere. The reason is that the R&D investors themselves (e.g. companies) often have difficulties capturing the full economic benefits that arise from their R&D.

Global competition, technology and knowledge flows often mean that, even with intellectual property protection, innovators only capture a portion of the economic return from their new products and services. In music, the development of artists is essentially R&D and the risks associated with capturing the economic benefits from artist development are higher than they have ever been.

Based on sound economic principles and in order to attract additional foreign direct investment, *The Next Big Bang* recommends that artist development needs be treated in the same manner as R&D in other intellectual property industries, to ensure sufficient

dedicated funding is available for artist professional education. In addition, similar to the film and TV industry in Canada, where there are tax incentives for both Canadian and foreign-controlled companies, existing music tax credits and any new tax credits should be expanded to go beyond support of domestically owned companies.

Following the publication of *The Next Big Bang*, the Ontario government established a grant program for the music industry in 2013 called the Ontario Music Fund. The first reference to the OMF reflects many of the themes developed in *The Next Big Bang*:

"The government will provide \$45 million in grants over three years, starting in 2013–14, for a new Ontario Music Fund. The province-wide fund will support new digital and record production and distribution of Canadian music, increase partnership opportunities, and promote Ontario's music industry both at home and abroad. Grants from the fund will help the industry to innovate, invest and take advantage of opportunities in the global music marketplace, bringing more recording activity to the province. The fund will also support Ontario's live music strategy, positioning the

province as a leading place to record and perform music [Ontario Budget, 2013, p. 53]." Containing four key component areas, the OMF is designed to "help support and create jobs, and position the province as a leading destination to record and perform [Ministry of Tourism, Culture and Sport, October 2013]."

A critical characteristic of the OMF is the fund-matching component contained in the programs targeting commercial music companies. By requiring companies to match all government investment (including OMF as well as all other government grants), the OMF will result in millions of dollars of additional private investment in the music industry in Ontario. As an example, in the first allotment of grants, it will stimulate about \$4 million in investment by Canada's major music companies.

In Alberta there is an opportunity to build on the existing Alberta Media Fund in order to create a more comprehensive program for R&D support in the music industry. Any additional programming should take into account the existing grants for domestic sound recordings.

MUSIC CELEBRATION

The important role music celebration plays in a national strategy is core to NMC's mandate and an area of further exploration beyond the original concepts developed in *The Next Big Bang*. Whether in the form of an awards program or a dynamic music centre, like NMC, the celebration of music in Canada, both past and present, is critical to all other efforts including export, tourism, and education.

Each of these goals build on the great reputation and quality of the musical products we produce.

A program like the Polaris Music Prize, for instance, does more than just drive increased sales, promotion, media coverage and live performance opportunities, it

also drives innovation and excellence. Founder Steve Jordan says, "Celebrations and awards give artists something to strive for, in our case for their actual work. To our surprise and delight over the years, I've heard from a few talent managers or artists that they have driven themselves to make better recordings in hope of a Polaris nomination [Canadian Heritage Committee, April 29, 2014]."

NMC will fill a gaping void in the celebration and amplification of Canada's musical heritage but will also provide the opportunity to build on the past through the engagement of young people, artists-in-residence, touring performers, and music fans.

ICTC suggests that tech clusters are often located in cities with an active music scene and therefore encourages governments to foster the development of music scenes by establishing some of the municipal support services that will incentivize music production and reduce friction that can occur between music performance and the city.



CITY/COMMUNITY BUILDING

Music's role as a city or community builder is documented in part in the sections on music education and music tourism. However, since the publication of The Next Big Bang, it has become clear that music's influence on a community goes well beyond the direct and therefore, obvious impacts.

The Calgary Arts Development Authority recently published an arts strategy focused on this very principle – that artistic expression, including music, builds communities. According to President & CEO Patti Pon's opening essay, "there are many factors that go into building a great city and LIVING A CREATIVE LIFE specifically explores how the arts contribute to creating a vital, prosperous and connected Calgary [Calgary Arts Development, 2014, p. 5]." It also cites numerous other Calgary publications that have parallel ideas.

Although it may be difficult to measure in a definitive way, quality of life influences where we live, work and play. Music's contribution to quality of life is essential, on an individual and collective basis. Music engages us on emotional, spiritual and physical levels. Music brings us together as a community in an audience or as performers. And it gives life to our neighbourhoods. Music can be the specific motivator for where one chooses to live or work. In Seattle, music is the 2nd most popular reason why people move there, second only to the natural environment. Music is a tool for economic development in Seattle [Keblas, 2014].

Perhaps not surprisingly, music professionals tend to cluster. Whereas a few generations ago, music professionals selected a city based on size and then built their careers, today they select a city based on the music scene, infrastructure and level of general public appreciation.

The aforementioned ICTC study has also pointed to the connection between music education, music scenes and technology clusters [The Information and Communications Technology Council, 2013].

Citing examples such as Toronto, Montreal and Austin, ICTC suggests that tech clusters are often

located in cities with an active music scene and therefore encourages governments to foster the development of music scenes by establishing some of the municipal support services that will incentivize music production and reduce friction that can occur between music performance and the city. By doing so, ICTC suggests cities will also attract workers and the technology firms that employ them.

Indeed, some of the largest technology companies in the world have established offices in Austin, in part due to the vibrancy of its music scene. The Austin Chamber of Commerce, which acts as the investment attraction arm of the city, uses music to entice companies to set up shop in the city. For instance, commercial site selectors are routinely hosted at Austin music festivals by the Chamber of Commerce in order to demonstrate the appeal of Austin's cultural scene.

"Austin is a place that appreciates creativity and culture in a variety of evolving forms, which serves to both attract and retain talented people. This in turn has a significant impact on business recruitment, retention, and expansion, as well as local entrepreneurship. [TPX, 2012, p. 22.]"

Austin continues to prioritize policies and regulations that encourage and nurture its creative industries. Analysis by Richard Florida confirms the role the creative sector plays in attracting companies from a broader industrial base,

"Access to talented and creative people is to modern business what access to coal and iron ore was to steelmaking. It determines where companies will choose to locate and grow, and this in turn changes the way cities must compete. [Florida, 2002, p. 6]."

In Alberta there is a strong cluster of creative industries and technology companies to build on in an effort to further leverage the nascent and growing music scene in the attraction of talent and companies looking for creative people.

ALBERTA'S MUSIC OPPORTUNITY

There is a unique opportunity in Alberta for a strategic initiative around the development of the music cluster. This initiative would build on key music assets that already exist in order to grow the activity in the music economy, while adapting some of the directions highlighted above to an Alberta context which will also result in meaningful contributions to broader community goals.

TARGETING ECONOMIC DIVERSIFICATION

Diversification of the economy is a key priority of many of the lead economic actors in Alberta. The Premier's Council for Economic Strategy published an action plan in 2010 which identified the broadening of the economic base beyond the natural resource-based economy as being critical. *Shaping Alberta's Future* summarized Alberta's economic vulnerability by demonstrating that the prosperity in Alberta is quite simply tied to the sale of one commodity to one export market, namely, energy to the United States.

On one hand, the report points out that Alberta is better off than some jurisdictions as it sets about to make changes: "The province is large enough to have a solid infrastructure platform on which to

build, but small enough to make large-scale change manageable [*Shaping Alberta's Future*, May 2011.]. Yet, at the same time, the report suggests that the relative affluence of the province due to resource wealth may make the province and its residents too complacent to institute change.

In what is emerging as a consistent theme, the study cites the example of Texas which, led by Austin, has been transformed from a resource-based economy to a high-tech hub. Missing from this Austin case study, however, is any mention of the connection to music and other creative industries which laid the groundwork for the growth of Austin's high-tech sector.



Kid Koala, NMC Artist in Residence
Credit: Tyler Stewart

A CREATIVE SOLUTION

The creative industries present a credible opportunity for employment diversification in Alberta.

More than 77,000, or 3.5% of the workforce, are currently employed in arts and culture in Alberta [Government of Alberta, March 2014] and the sector contributes an estimated \$8.2 Billion to the Gross Domestic Product [Alberta Budget Papers, March 2014]. If the creative industries are defined more broadly as to include such fields as architecture, drafting and digital media, estimates increase substantially with 67,000 employed by 19,000 companies in Calgary alone [Calgary Economic Development, 2010, p. 4].

One of the difficulties in setting targets for employment growth in the sector is the absence of robust measurements of the current workforce and the economic impact of the creative industries. Calgary Economic Development admits that "it is difficult to estimate the exact number of Calgarians who are employed within the creative industries

sector" [Calgary Economic Development, pg 6]. In fact, in the case of music, many artists and musicians are self-employed and some likely have jobs in other sectors in order to supplement the income they receive from their music pursuits. Economic impact studies have not been prepared in Alberta for music and national studies tend not to filter out the activity in Alberta alone. A separate comprehensive study for Alberta will help to fill this gap and enable the music and economic development communities to set realistic targets for growth in music.

One issue that must be explored in this study is the question of retention. In the music industry it has been the experience that many artists and musicians feel they must leave the province in order to adequately develop their careers. Larger centres like Vancouver, Portland, Seattle, Toronto, Montreal or Nashville, where there is a greater supply of music industry professionals, including managers, labels and agents, often lure Alberta artists away. This results in a significant talent drain from the province while also often disadvantaging Alberta artists who have built a local fan base that may or may not remain engaged after the relocation. Further research into the sector profile in Alberta will help to quantify the relative numbers of artists and musicians as well as industry professionals.

Another issue that should be explored is the question of how to build business capacity and capability into the music sector. Primarily driven by creative stakeholders, the music industry has become decentralized and suffers from a poor understanding and use of effective business practices. Understanding industry changes and systemic issues which plague the industry today would enable us to determine ways to engage the business community from both the music sector and other sectors to develop business literacy in the music sector and apply business practices and processes that result in a robust and profitable music industry. Music Administrator awards such as those available from the Rozsa Foundation, and

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programs effecting a cross transfer of knowledge (Bus Lit for Music Appreciation and cross industry mentorship opportunities) are possible ideas to explore and develop in this area of study.

However, a vibrant cultural landscape is understood to be about more than just those employed directly in the sector. Vibrant cultural activities are also recognized as helping to “develop, attract and retain skilled and innovative individuals and their families [Alberta Culture, January 2008, p. 4].”

The experience of Austin, Texas proves that commercial music in particular, can be leveraged by cities to attract and retain young workers and the industries that employ them. In fact, the ICTC study, *Music – A Catalyst for Technology Hubs and Innovative Talent*, shows that there is a strong correlation between music scenes and technology clusters. This is a principle widely expressed in Alberta, for instance,

“A creative city is one in which its cultural resources are seen as more than just assets; they are recognized as economic drivers in the attraction of talent, innovation and ideas which point to a new paradigm for urban change [Calgary Economic Development, 2010, p. 57].”

Alberta has a young and growing population and yet still cannot keep pace with demand for workers. “Nine in 10 net new jobs in the past year [in Canada] have been created in Alberta alone, or 82,300 out of the total 94,700 across all the provinces. Alberta has tallied year-over-year employment growth of 3.8 per cent, more than seven times the pace of the national average [Grant, March 7, 2014].” The same article cites high numbers of job postings in Alberta and employers who are “looking further afield to find workers.” In fact, attraction and retention of skilled workers is, according to the Calgary Chamber of Commerce, the number one concern of its members [Crockatt, February 26, 2014].

Labour force statistics released in May 2014 peg Alberta’s unemployment rate at 4.6%, the second lowest in Canada, behind only Saskatchewan, and well ahead of the national rate of 7.0% [Statistics

Canada, Labour Force Survey, May 2014].

Mount Royal University Professor, Richard Sutherland, argues that the relative affluence of Alberta has dampened the perceived need for a cultural industry policy which he suggests is not unusual for resource economies, citing a study by California academic Terry Lynn Karl: “The energy industry and its attendant spin-offs have created a labour shortage, even amongst youth. In this circumstance, a cultural industry policy has less traction – perhaps another casualty of a ‘petro-state’ in which oil revenues discourage long-term economic diversification [Sutherland, 2013, p. 375].”

Yet the labour shortage is exactly the reason why a cultural policy will have traction in Alberta. Given the experience of other jurisdictions and the mounting evidence that music scenes are an effective tool for economic development, talent retention and attraction, a music initiative which is framed within the context of these larger economic goals will resonate at regional and provincial levels.

“Alberta’s rich arts ecosystem indicates that Alberta is about more than just work; the arts sector helps attract and retain the knowledge-based and skilled workers and their families that the province needs to grow and prosper in communities that show significant participation in the arts. [Alberta Foundation for the Arts, February 2013, p. 24].”

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MUSIC ASSETS AND OPPORTUNITIES

Alberta has a long history of influencing the careers of award-winning artists, some Alberta-born and others drawn to the mountains or ranches. Wilf Carter, Ian Tyson, k.d. lang, Jann Arden, Corb Lund, Feist, Oscar Lopez, and Tegan and Sara come immediately to mind, but the depth of raw talent in Alberta goes much deeper.

Alberta is also home to some of the country's most successful festivals including the Calgary Folk Festival, Edmonton Folk Festival, the Big Valley Jamboree, Interstellar Rodeo and Sled Island Music and Arts Festival, as well as smaller festivals peppered in towns and villages throughout the province. The century old Calgary Stampede also forms part of the landscape as it weaves music into its year round programming and yet, still has tremendous growth opportunities in live music. Anchored in the two cities of Edmonton and Calgary, Alberta's music scene is also made up of a collection of small clubs and venues and larger arenas that play host to touring artists. The two cities of approximately a million people each provide an affluent, young audience. In fact, per capita cultural spending in Alberta is the highest in Canada [Calgary Economic Development, 2010].

The Banff Centre is globally recognized for its arts and cultural incubation, education and training, and the CKUA Radio Network, the country's oldest public radio station which is supported financially by listeners, makes a commitment to early and sustained support for Canadian artists. Deep roots in the classical genre also abound in Alberta led by the highly successful Calgary Philharmonic Orchestra

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and Edmonton Symphony Orchestra, as well as many smaller ensembles, and choral societies. And of course the National Music Centre provides a new opportunity not only to tell the country's story through music but also to serve as a national hub for international quality music programming in an architecturally award winning facility that is being built in Calgary.

The weak link by all accounts is the music industry infrastructure. While Alberta is not without homegrown labels, recording studios, promoters and managers, there are not sufficient numbers to support artists in the various stages of their careers. While the notion that artists must reside in the same vicinity as their professional teams could be challenged, it is commonly understood that strategies must be employed to support the development of more music professionals in the province.



Peter Stone and Denise Mackay of *100 Mile House* taken by Bri Vos -
Detour Photography - www.detourphotography.ca - Edmonton Folk Music Festival 2014

ALIGNMENT OF STRATEGIC PRIORITIES

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Beginning at a provincial level, the Culture Business plan includes numerous goals that could be moved forward by a music-focused initiative including long-term growth of the sector, greater awareness and understanding of the value of culture, incorporating culture into education, and, providing resources for increased collaboration, growth and development [Alberta Budget Papers, March 2014]. Cultural funding and programming have enjoyed continued support at the provincial level despite decreases in other program areas.

Like many other jurisdictions, Alberta has developed a strong film best practice which is characterized by stable, comprehensive all spend (including music score) tax credits for both domestic and international companies, the Alberta Film Advisory Council, film commissioners in Calgary and Edmonton, consistent data collection and the development of a narrative that tells a positive story about film's

activity and impact on the economy. Recently this resulted in a five million dollar provincial investment in a new film studio in Calgary.

Alberta's Cultural Industries division is undergoing an organizational change during which it will identify top priorities in each creative sector. According to Executive Director Jeff Brinton, the key is industry development. This presents an enormous opportunity to contribute to this reimagining of provincial support for music. One of the early activities in this area is the development of a manager training program that is being led by Alberta Music. Municipally, there are also a number of strategic initiatives underway that align with a music cluster development strategy.

The Edmonton Arts Council (EAC) has prioritized support for cultural industries and entrepreneurs. Noting the use of music commissions in some US cities, and best practices in film, the EAC wishes to work with the private sector and the province in order to identify the best ways to support sound recording as well as live music. The Alberta Music Cities Initiative will assist the EAC in achieving this outcome.

Calgary's equivalent, the Calgary Arts Development Authority (CADA) has produced a comprehensive strategy which aims to "align and activate Calgarians in creating a vital, prosperous and connected city through the arts [Calgary Arts Development, 2014]." The strategy was developed through an extensive community consultation process that saw over 1000 people contribute. The result, as it applies to this music initiative, is numerous complementary goals related to creative communities, centre city arts district, arts incubation, artistic exchange and youth and education. In each of these areas there are specific goals that could be part of the AMCI. CADA is looking for partners to take ownership of key activities and would be open to leadership by NMC.

NMC is ideal to lead this work; it connects all aspects of the music industry, both creative and commerce participants, to business leaders from all other industry sectors and becomes an effective translator between the value of music and/or exchanger of tangible benefits between the music and these other industries. In return for creating an attractive environment for other industries to recruit talent from abroad, NMC can leverage the knowledge base from these industry sectors to further improve processes, practices, business literacy and ultimately profitability in the music sector. Furthermore, NMC has a local, regional and national focus and reach which provides significant leverage and credibility to affect a vibrant music scene in Alberta.

Finally, of note is an effort at The Banff Centre to reinvent its leadership programs. The Peter Lougheed Leadership Initiative is a transformational program designed to reposition The Banff Centre as a leader in education and training for the creative industries. With the need to develop a larger and robust professional infrastructure in music as a priority, TBC could be well positioned to support a music initiative, and indeed has been involved since the early discussions began in 2011. The Haskayne School of Business provides an example of how they partnered with the Rozsa Foundation to provide business leadership to Alberta managers in the Arts and Creative sectors.

VISION FOR ALBERTA'S MUSIC INDUSTRY

As mentioned in the introduction, this vision document owes its genesis to a conversation that began between The Scotlyn Foundation and The Banff Centre in 2011 and continued through 2013. Participants from the creative sector contributed to an initial vision for a vibrant music industry in Alberta which they described as follows:

“Alberta is recognized as the “peoples’ choice” in terms of artistic talent and industry support for produced music, audience, funders and location. Popular music is created by local, national and international talent and a strong support community exists to produce the highest quality of music for commercial release (hard copy and online),

TV, Podcasts and live streaming. The Alberta music industry is profitable and the province, business and audience support excellence & creating a better place to live for musicians, related talent and the industry support community.”

This description of success is the starting point for the AMCI.

ACTION PLAN

RECOMMENDATION 1

Develop a comprehensive understanding of the economic profile of Alberta's music cluster with regional breakouts for Calgary and Edmonton as well as other smaller cities as appropriate.

The analysis would begin by gathering economic data and examining trends in recording, publishing and live performance activity, population of those working in the music community and their level of income, volunteer contributions and indirect and direct spending.

In developing the appropriate modeling for the study, similar surveys can be examined including Soundcheck: An Economic Impact Analysis of Manitoba's Music Industry, Sound Analysis: An Examination of the Canadian Independent Music Industry (CIMA), Economic Impact Analysis of the Sound Recording Industry in Canada (Music Canada) and a profile of the BC music industry that is currently underway by PwC.

Anticipated outcomes:

Economic profiles help industries to assess, strategize, influence and implement necessary changes. Through the measurement of key indicators in music activity in the province, the study will create baseline metrics that will be used to measure the success of subsequent strategies. It will provide data necessary to develop a story about the impact and potential of music in Alberta and the key cities of Edmonton and Calgary, which will be used in order to articulate the value and importance of music. The study will allow NMC and its partners to identify gaps in the industry, helping to set key priorities for the provincial music strategy.

This profile would also be useful to other organizations in Alberta, aligning with several programs underway, including:

- a. Calgary Arts Development is gathering available data in order to establish baseline indicators for *Living a Creative Life: An Arts Development Strategy for Calgary* of which music will be a part. Anticipated completion: end of 2014
- b. Committee with representation from CADA, Edmonton Arts Council, AFA, Canadian Council for the Arts and Canadian Heritage has begun meeting and reviewing needs for data collection.
- c. Tourism Calgary has noted that economic impact studies from cultural organizations are not uniform, providing different levels of information and analysis – a uniform model could be attractive to private sector partners.
- d. Calgary Economic Development will release its newest cultural profile in March 2014. Previous profiles have contained little information about music.
- e. Provincial government wants to better communicate value of culture and support collaborative projects – potential funding through AFA.

Potential Funding partners:

The joint committee of Alberta Foundation for the Arts, Calgary Arts Development, Edmonton Arts Council, Canadian Council of the Arts, and Canadian Heritage, collectively or as individual organizations.

Data Collection partners:

In addition to secondary research as noted above, the sector profile will require input in the form of a data collection survey that is completed by members across the music community, including artists and musicians, industry professionals, live music promoters, venues, agents and festivals.

Alberta Music has agreed to be part of any effort to better quantify the impact of music in Alberta. Access to the membership base of Alberta Music would simplify the collection of data.

Others that would be approached to assist with data collection: AFA, CADA, Edmonton Arts Council.

RECOMMENDATION 2

Position music as a key economic sector and vehicle for diversification of the economy of Alberta and method by which municipalities can stimulate economic growth, increased investment, youth retention and attraction and tourism.

This is a long-term objective. The cultural value of music is well understood but the economic and social values are less known at the municipal and provincial levels, in particular as they apply to the commercial music sector.

The music community can learn from the film and television community, which in Alberta, as in other provinces across the country, has succeeded in better telling its story. Take for instance, the scant mention of music in Calgary Economic Development's creative sector profiles but extensive coverage of film's activity and impact. This is by no means intended as a criticism of Calgary Economic Development, but a commendation of the film community for its effective communication and advocacy.

Music communities in Ontario, Manitoba and BC are, to varying degrees, beginning to tell their stories, framing music's importance within the narrative of job retention and development, investment attraction, tourism growth and diversification of the economy. These are key priorities of governments at all levels. As opposed to downplaying the cultural value of music, framing music in this broader fashion helps to bolster the traditional arguments for music support.

Tactics:

- a. Develop a comprehensive communications strategy for the launch and dissemination of the sector profile prepared above. The findings will, among other things, determine the need for future



Shout Out Out Out Out, NMC Artist in Residence
Credit: Chad Schroter-Gillespie

research: for instance, the development of a “Next Big Bang” document for Alberta.

b. Develop a non-partisan “Minister’s Music Night” event to showcase Alberta talent to provincial decision makers and raise the level of awareness about the value of the industry. This invitation-only event could also assist in reaching potential private sector donors of NMC.

c. In conjunction with key Alberta promoters and festivals, develop a strategy to ensure Mayors and Councillors in Edmonton and Calgary are exposed to live music events in their communities so that they can witness their positive impact.

d. Seek speaking opportunities for leaders of the project at various speaking events.

e. Work with the Chambers of Commerce in Alberta, Calgary and Edmonton in order to develop policies supporting the growth and development of music; a first step is to address a Chamber audience as a way to educate the broader business community about music’s broader contribution to the economy.

f. Organize a trade mission to a key market (i.e. Austin, Texas or Nashville, Tennessee), arranging meetings with the primary economic actors who can explain how they leverage and support music in their community. There is an existing alliance between Edmonton and Nashville that is currently being rejuvenated and may provide a framework for a mission. Alternatively, Music Canada has led similar missions in the past to Austin. Coinciding with a major festival like Austin City Limits Festival in October is recommended.

Anticipated Outcomes:

A comprehensive strategy is developed with the support and involvement of key experts and stakeholders which further serves to validate the role of NMC as an Alberta hub for music advocacy and leadership (note above). High profile events and

activities serve to raise the level of understanding of the power of music as an asset that must be nurtured and supported – leading to greater engagement of governments at municipal and provincial levels, political support for sector development and live music strategies, media awareness, and increased private sector and philanthropic donations to NMC. This will lay the groundwork for advocacy efforts to establish,

1. Music officers in Calgary and Edmonton, and,
2. A provincial music advisory council.

The music officers would focus on two key functions: navigating city hall and assisting with permit and licensing fulfillment; and business development. These music officers would also help improve the communication between city hall and the local music community.

The Alberta Music Advisory Council would be modeled after the Alberta Film Advisory Council. It would be composed of representatives from the music community, Alberta Ministry of Culture and the city music officers. Unlike the Alberta Film Advisory Council, the Alberta Music Advisory Council should also include representatives of tourism in order to ensure provincial music development efforts are coordinated with the cohesive music tourism strategy. NMC would seek its endorsement of the ACMI and this advisory council would provide advice about provincial support for music.

Potential Partners:

- i. Minister of Culture
- ii. Major festivals and promoters: Calgary Folk Festival, Sled Island, Edmonton Folk Festival, Big Valley, Interstellar Rodeo, Tooth Blackner Presents, Union Events Calgary, Live Nation
- iii. Organizations that arrange events and speaking engagements: Calgary Chamber of

Commerce, Edmonton Chamber of Commerce, Canadian Club Calgary, The Banff Centre, Alberta Music, Junior Chamber International Edmonton, Young Professionals Group of Calgary, Travel Alberta Conference

iv. CKUA Radio Network, Media partners, sponsors

v. Austin Music Office, Austin Convention and Visitors Bureau, Austin Chamber of Commerce, Austin Music Foundation

RECOMMENDATION 3

Develop and implement a strategic plan to build the business capacity of the music industry in Alberta.

In collaboration with Alberta Music, create an industry working group charged with developing a strategy and action plan aimed at improving the level of industry support and the business capacity of the music sector as defined in the “Description of Success”.

- i. Promotion, agents, managers, publicists, labels,
- ii. Events, organizers,
- iii. Recording, production,
- iv. Concert venues, programs,
- v. Creative & rehearsal space,
- vi. Education & training,
- vii. Industry experts,

As well, the music community can learn from other key business sectors in Alberta, such as the oil and gas and key technology sectors. Many of the business processes and practices can be readily adopted to support a more robust approach to building and operating the music sector.

Tactics:

- a. Create a mentoring program utilizing the experience of existing professionals in Alberta as well as experts from outside the province (within the music industry as well as other sectors), in order to mentor aspiring industry professionals as identified through community and educational outreach programs. The manager training program that is being development by Alberta Music may provide a template.
- b. Advocate for a provincial capacity-building job grant through the Alberta Media Fund for music industry firms. The program would prioritize full time employment growth rather than short term internship positions. It could be structured as a fund-matching grant, whereby 50% of the salary of a new position would be eligible.
- c. Explore the merits of a training program with The Banff Centre leadership program aimed at increasing the capacity of industry professionals – beginning with the summit planned for late 2014/early 2015.
- d. Develop and implement a Business Sector Music Industry Incubator program and answer the question, using practical strategies and action plans for: “how can stakeholders in the Music Sector grow their business profitably in the next decade and beyond?”

Anticipated Outcomes:

An updated sector profile in 5 years would demonstrate a measurable improvement in all indicators including the number and training of professionals operating in all the above categories as well as a lower out-migration of artists and musicians.

Potential Partners:

Alberta Media Fund, Alberta Foundation for the Arts, The Banff Centre Leadership Program, Alberta Music, Music Calgary, newly formed Alberta Music Advisory Council (Recommendation 2), Rosza Foundation, industry corporations with passion for this initiative and with funds and staff who will leverage their business acumen and network to achieve the goals of this industry working group.

RECOMMENDATION 4

Develop and implement a live music strategy for Alberta in order to improve the live music product offering in Alberta and generate increased music tourism.**Possible Tactics:**

- a. Create of an inventory of available venues throughout the province including information on capacity, facilities and production services as well as frequency of use.
- b. In conjunction with members of the live music community in Alberta, develop a profile of the audience, its needs and desires, in order to create a program for audience renewal. This could be accomplished in association with AFA. Data about the existing audience may exist through required reporting from funded events and festivals. Adding a “customer service survey component” could glean the additional information.
- c. Develop an Alberta touring model to encourage greater use of available venues by local and international artists.
- d. Develop a music brand in conjunction with Tourism Calgary, Edmonton Tourism and Travel Alberta, as well as live music representatives and youth representatives and encourage its use in tourism promotion activities by these agencies as well as the live music sector.

Anticipated Outcomes:

The venue inventory would help to identify gaps in live music infrastructure in Alberta, providing valuable information for private and public sector planning. It could also be made available to artists and their managers who are planning tours of Alberta in order to encourage more use of the existing venues.

By working with the live music community and funding agencies like AFA to develop a greater understanding of the audience profile in Alberta, as well as areas of potential improvement, it will be possible to identify opportunities for audience renewal and growth.

Music tourism promotion through the branding and promotion of live music will lead to larger audiences and greater awareness of live music events among tourists, more live music and subsequently more performance income for artists, greater attraction of touring artists, and more collaboration opportunities for Alberta artists.

Potential Partners:

AFA, Alberta Music, CADA, EAC, Tourism Calgary, Edmonton Tourism, Travel Alberta, Ministry of Tourism, Music Canada Live, newly formed Alberta Music Advisory Council (Recommendation 2), Canadian Heritage and Alberta-based business corporations with a vested interest.

As the AMCI project develops, it will be critical to engage more regional music and arts organizations across the province.

CONCLUSION

The Alberta Music Cities Initiative is perfectly timed to answer calls for the stimulus of cultural industries in Alberta that have been voiced by many municipal and provincial agencies. Culture is widely recognized as a vehicle for identity and expression, a catalyst for community development and city building, a source of creative talent, and a draw for tourism. In Alberta where the simmering economy attracts many young workers, music has the power to turn communities built around the need to provide housing for workers into vibrant, lively, neighbourhoods where families thrive and prosper.

As Alberta continues to diversify its economy in order to address the vulnerability presented by the dependence on oil revenues, the growth of the music sector can help both directly and indirectly. The Alberta Music Cities Initiative will, most importantly, create new opportunities for artists and musicians in Alberta to build successful, rewarding careers while maintaining their home base in the province. It will also create the conditions for the expansion of existing music businesses and attraction of the new

ones. This will retain and create jobs in the sector. In addition, promoting and growing the presence of music in Alberta's key cities and communities, will create an environment that attracts and retains young talented workers across a variety of industries from the rest of Canada and from around the world.

Through leadership of the initiative, NMC will grow its reputation as a thought leader and amplifier. It will magnify the community-focused nature of its programs, collections and performances. And NMC will secure its present and future place as the hub of music activity in the province and ultimately throughout Canada and beyond.

The Alberta Music Cities Initiative will build from a strong provincial foundation made up of a deep music history, profitable music events and festivals, network of halls and venues, and a roster of locally and internationally renowned artists who will embrace the opportunity to help make Alberta the choice for music.

ABOUT THE AUTHOR



Amy Terrill is the Vice President of Public Affairs at Music Canada. Amy plays a key role in the development and implementation of Music Canada's government relations and communications strategies including its music city initiatives. She has also led the organization's research activities since 2010 which have included the publication of *The Next Big Bang, Accelerating Toronto's Music Industry Growth, Leveraging Best Practices from Austin, Texas, and Economic Impact Analysis of the Sound Recording Industry in Canada*. Amy is a fan of Alberta's big skies, boundless excitement and authentic sounds.

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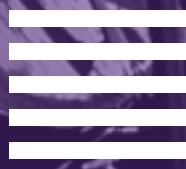
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