



# CITY OF NIAGARA FALLS

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# MUSIC STRATEGY

Executive Summary  
November 2023

Presented by  
Sound Diplomacy



# INTRODUCTION

## SOUND DIPLOMACY

We are honoured to have had the opportunity to collaborate with Niagara Falls on the development of the city's first music strategy. This project began with the intention of building Niagara Falls' identity as a "music entertainment city", harnessing the power of the Niagara Falls' already thriving tourism sector to embed music in the fabric of the city.

**Niagara Falls has a rich and unique history, with diverse entertainment offerings for tourists and residents alike, but there is potential to harness the power of music to support and expand those offerings, creating real economic and social value.**

Niagara Falls benefits from a supportive community and government that recognize the value of the arts and culture. However, the community's enthusiasm for the arts and their participation in cultural activities must be met with supportive policies, structures, and equitable governance. Economic data, policy and regulatory analysis, and conversations with local musicians, event organizers, venue owners, city officials, and tourism stakeholders have revealed that, with the implementation of strategic policies and programming

to support Niagara Falls music sector, music tourism can assume a pivotal role in the city's landscape. With a thoughtful strategy, Niagara Falls' ultimate goal of becoming a well-known destination for music is well within reach. This report and the recommendations that follow aim to build upon what already exists in Niagara Falls, developing the city's unique tourism economy to usher the city into its next phase as a place that recognizes and promotes the value of the local music sector. Support for the music ecosystem has a myriad of benefits, and can translate into increases to employment, tax revenue, and spending within the city, benefiting tourists as well as the community that calls Niagara Falls home.

To this end, the Niagara Falls Music Strategy identifies key action items to put Niagara Falls on the map as a

music entertainment destination and develop the city as the entertainment capital of Canada. Recommendations are written with consideration for Niagara Falls' unique history, the current state of the music scene, and its future potential. We hope that this report – and the data and evidence it contains – remains a living document and guiding light that both government and civic society can use and adapt to strengthen the Niagara Falls music ecosystem. We remain indebted to the residents of this incredible city who were so generous in sharing their time, knowledge, and perspectives with us, and look forward to continuing to push forward as Niagara Falls evolves into a vibrant place for music.

**Shain Shapiro,  
Founder and Chairman,  
Sound Diplomacy**

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# 1. ABOUT THE PROJECT

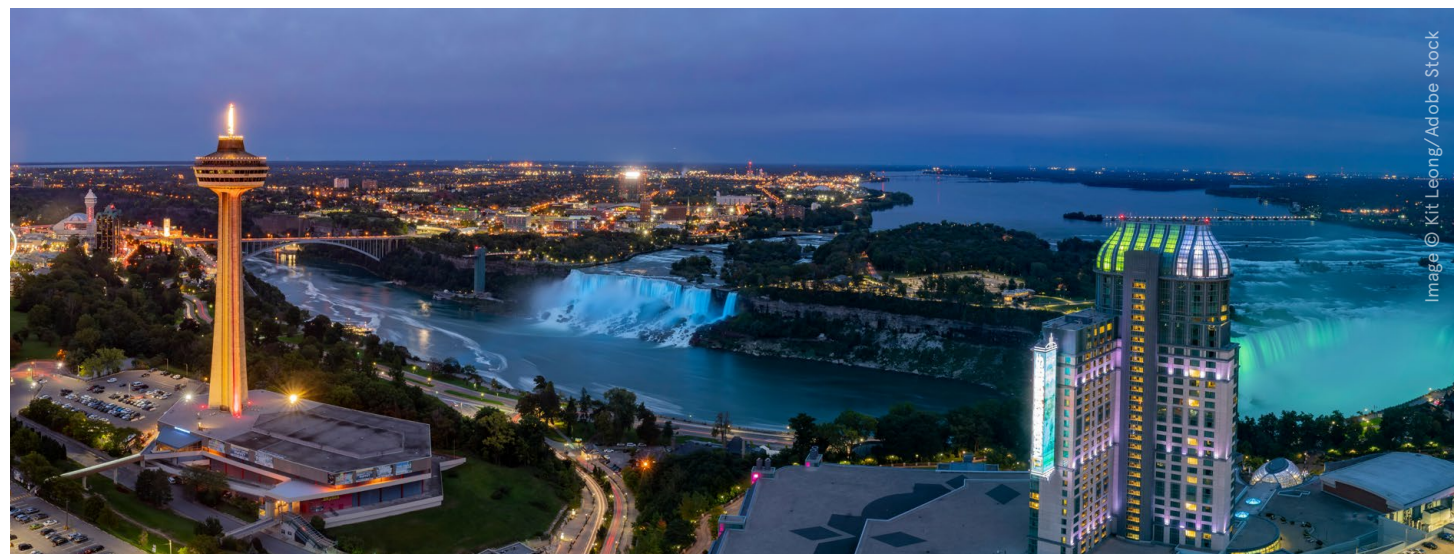
## PROJECT DESCRIPTION

In late 2022, Sound Diplomacy was engaged by the City of Niagara Falls to prepare a music strategy for the city in an effort to diversify Niagara Falls' successful tourism sector, develop the local music ecosystem, and build Niagara Falls' identity as the entertainment capital of Canada.

Through this work, it became clear that Niagara Falls is a unique city with strengths that make it well-positioned to develop a thriving local music scene. The importance of the city's tourism sector as a key driver of the local economy is a particular economic strength that can be leveraged by the music sector.<sup>1</sup> Moreover, Niagara Falls is teeming with entertainment infrastructure, including casino resorts and a major convention center, as well as an abundance of hotels, motels, and related hospitality properties, important assets the city should take advantage of as it builds out the local music offering.

Our research found that the music sector in Niagara Falls already makes significant contributions to the economic fabric of the city. Music helps to foster diversity, recognition, and inclusion across different communities and can also act as a platform for new expressions of creativity. In addition to these intangible benefits, music contributes to the local economy in numerous ways, and can lead to increased tourism.

An integrated approach is needed to secure the future of Niagara Falls' music ecosystem and grow the city's reputation as a place for music. From making resources accessible, building awareness for local musicians and programming, and bringing varied stakeholders together to develop effective policies and programs, we hope this strategy will act as a guide for developing the Niagara Falls' music scene, contributing to Niagara Falls' goal to build a reputation as the entertainment capital of Canada.



# METHODOLOGY

Sound Diplomacy deployed the following processes in the development of the Niagara Falls Music Strategy:

## COMMUNITY IDEATION

Vision meeting with the City of Niagara Falls and key stakeholders to discuss the Niagara Falls music ecosystem and project objectives, with the goal of developing a unified set of strategic aims for the project.

## MUSIC AND TOURISM ASSET MAPPING

Identification of music and tourism-related assets in Niagara Falls. Using data gathered from primary and secondary sources, and verified by the City of Niagara Falls, Sound Diplomacy created an interactive digital [map](#).

## SWOT ANALYSIS

Analysis of research and findings from mapping, literature review and regulatory assessment, economic impact analysis, and stakeholder engagement to provide insight into the strengths, weaknesses, opportunities and threats to Niagara Falls' music ecosystem.

## LITERATURE REVIEW AND REGULATORY ASSESSMENT

Analysis of local and regional reports, plans, policies, and regulations relevant to Niagara Falls' music ecosystem. The analysis includes a regulatory assessment of current city and provincial regulations impacting the music ecosystem, as well as a related best practice case relevant to each to guide how existing regulations could be made more music friendly.

## ECONOMIC IMPACT ASSESSMENT

Assessment of the direct and indirect economic value of the music ecosystem in Niagara Falls.

## STAKEHOLDER ENGAGEMENT

Engagement with stakeholders to gather front-line insights on the Niagara Falls' music ecosystem. Approximately 800 people participated in an online survey, while just under 30 key stakeholders from Niagara Falls' local music ecosystem took part in roundtable sessions.

## STRATEGIC PLAN

A comprehensive plan that serves as a blueprint for developing and maintaining a thriving music ecosystem in Niagara Falls, based on the previously completed analytical work.

## 2. CITY AT A GLANCE

The City of Niagara Falls is located in southern Ontario, and shares a border with Niagara Falls, New York, in the United States. The city is a popular tourist destination, as it is situated on the western bank of the Niagara River, opposite the natural wonder of the Niagara Falls.

The city has a population of approximately 94,000 people and counts the Niagara Fallsview Casino Resort, Four Points, Canadian Niagara Hotels Inc., Hilton Hotels and Suites, and the Niagara Parks Commission as major employers.<sup>2</sup>

To gain an in-depth understanding of the city's regulatory landscape, an analysis of existing local and regional regulations that impact the Niagara Falls music ecosystem was conducted. This allows for the

identification of regulation which may be prohibitive for the music sector, as well as those that can be enhanced or adapted. The results of this exercise are summarized below. The table below includes an overview of both the current state of the regulation in Niagara Falls and a best practice case for each area analyzed, which highlights regulation in a relevant jurisdiction that is supportive to the music ecosystem.

TOPIC	IN PLACE?	CURRENT POLICY	BEST PRACTICE
MUSIC OFFICE	No	Niagara Falls does not have a dedicated Music Office.	<b>London, Ontario</b> founded a Music Office in 2015 as a division of The City of London Economic Development & Planning Department. <sup>3</sup> The Music Office is led by London's Music Industry Development Officer and serves as the connector between the music industry and the city.
CITY-LED FUNDING AND GRANTS	No/Yes	Niagara Falls does not have a city funding program specific to music. However, the City of Niagara Falls Cultural Development Fund, which was founded in 2016, disburses funding to cultural projects annually. <sup>4</sup>	<b>The Vancouver Music Fund</b> , a collaboration between the City of Vancouver and Creative BC, works to distribute the \$300,000 fund to Indigenous peoples and other underrepresented groups. <sup>5</sup> The fund is intended to support the growth and development of Vancouver's music sector by supporting projects that provide access to space, promotion and education. <sup>6</sup>
EVENT PERMITS	Yes	Events that take place on municipal property, such as sidewalk sales, filming, and parades, require a Special Events Permit. <sup>7</sup>	<b>The City of Ottawa</b> maintains a PDF document that outlines all the steps required by the City's event planning processes, with hyperlinked text to make additional information convenient and accessible. <sup>8</sup>
ALL AGES ORDINANCES	No	Niagara Falls does not have any specific city regulations related to all ages venues. Age rules vary from venue to venue and from event to event.	<b>Seattle</b> requires all-ages dances, which admit youth under 18-years-old, to obtain a specific regulatory license, the All-Ages Dance Business license. The license is required for anyone operating an all-ages dance that will have 250 or more attendees. <sup>9</sup>

TOPIC	IN PLACE?	CURRENT POLICY	BEST PRACTICE
LIQUOR LICENSING	Yes	Liquor licensing is handled by the Alcohol and Gaming Commission of Ontario (AGCO). A permit from the AGCO is required any time alcohol is offered for sale or served anywhere other than in a licensed establishment (such as a bar or restaurant) or a private place (such as a private office or home). <sup>10</sup> Special events that serve liquor require a Special Occasion Permit.	Because permits and laws surrounding alcohol are controlled provincially, cities must follow all regulations established by the <b>Alcohol and Gaming Commission of Ontario</b> . As such, there is no relevant local best practice example for liquor licensing.  The Government of British Columbia has developed a Special Event Liquor Permit (SEP) terms and conditions and policy manual, which includes an overview of the types of events that require an SEP, limits and exemptions, hours of operation permitted, rules around liquor, and safety. <sup>11</sup>
NOISE REGULATIONS	Yes	Niagara Falls has a noise by-law that prohibits music from being played between the hours of 9 p.m.-7 a.m. during the week, and 9 p.m.-9 a.m. on Saturdays, Sundays, and statutory holidays. The area of the city that extends from the waterfront to Allendale Avenue, McGrail Avenue, Ellen Avenue, Falls Avenue and Bender street, is exempted from this rule. <sup>12</sup>	<b>Montreal</b> has appointed a "noise minister" to address noise in the city. The City of Montreal distinguishes between neighbourhood noise, construction noise, and commercial noise, with different complaint processes for each. Each borough in Montreal can develop their own rules regarding noise, in addition to the general regulations established by the city. <sup>13</sup>
BUSKING	No	The City of Niagara Falls does not permit busking and any such activity is prohibited on municipal property. Exceptions are made for busking that occurs during licensed special events.	<b>The City of Calgary</b> has developed the 'City of Calgary Busking Guidelines' to simplify and streamline the process of becoming a busker. <sup>14</sup> The City also sends out regular email updates for buskers to ensure they are informed on City policy, process changes, and important deadlines. <sup>15</sup>
ENTERTAINMENT DISTRICT	No	Niagara Falls' Zoning By-law includes provisions for places of entertainment, however, there is no formalized Entertainment District written into the city code. <sup>16</sup> The city has six Business Improvement Areas (BIAs) that will often hold events, which includes the Downtown BIA, <sup>17</sup> Clifton Hill BIA, <sup>18</sup> Lundy's Lane BIA, <sup>19</sup> Historic Drummondville BIA, <sup>20</sup> Victoria Centre BIA, <sup>21</sup> and Fallsview BIA. <sup>22</sup>	<b>Montreal's Quartier des Spectacles</b> has a rich cultural and entertainment history as North America's most diverse and concentrated collection of cultural venues. The approximately 1 km <sup>2</sup> area is home to unique city planning, and encompasses over 30 performance halls and eight public spaces, which collectively host over 100 shows a month. The area also has approximately 40 exhibition spaces and several cinemas.
MUSIC WORKSPACE / HUB	No/Yes	Niagara Falls city began construction on the Niagara Falls Exchange, the city's new cultural hub, in 2020. <sup>23</sup> The building will serve as a cultural hub and market, and will provide shared spaces where musicians can come together and create. <sup>24</sup>	In 2019, the <b>Signal Hub</b> , one of the largest music and sound communities in the world, was launched in <b>Toronto</b> . The space houses over 25 studios, as well as work and event space. Individuals can rent private production rooms and writing suites on a monthly or hourly basis. <sup>25</sup>
ECONOMIC DEVELOPMENT INCENTIVES	No	There are no Niagara Falls based economic development incentives specifically geared towards music.	In 2020, <b>Toronto City Council</b> expanded the <b>Creative Co-Location Facilities Property Tax</b> subclass to include live music venues, which substantially lowered property taxes for qualifying live music venues to support their sustainability and growth. Venues must meet application criteria, which includes infrastructure requirements, a minimum threshold of live music shows annually, and guaranteed compensation for artists. Applications and supporting documentation are submitted to the city via email and assessed by taxation year. <sup>26</sup>



TOPIC	IN PLACE?	CURRENT POLICY	BEST PRACTICE
MUSIC STRATEGY	No	Niagara Falls does not have a music strategy.	In late 2019, the <b>City of Victoria's Music Advisory Committee</b> collaborated with Sound Diplomacy and the Music BC Industry Association to build the City's first-ever Music Strategy. The Music Strategy provides guidance for developing Victoria as a music hub and global music destination, with implementation over the period from 2022 to 2026. <sup>27</sup>
MUSIC TOURISM STRATEGY	No/Yes	There is no formal music tourism strategy currently in place, but Niagara Falls Tourism is leveraging music as a tourism asset.	<b>Initiative London</b> and <b>Initiative Canada's</b> global planning teams joined forces with Destination Canada and Spotify to develop and implement a unique music tourism strategy aimed at attracting European tourists to Canada. The campaign was geared towards listeners in the U.K., France and Germany, allowing them to learn more about Canada through a digital music experience on Spotify. Spotify's API technology recommended a Canadian city and accompanying personalized playlist, with content from Canadian musicians specific to the City. Calgary, Toronto, Montreal and Vancouver made up the cities included in the program. <sup>28</sup>
ENVIRONMENTAL SUSTAINABILITY & RECYCLING	No/Yes	Niagara Falls does not have any sustainability and recycling programs or initiatives related to music.	<b>The Green Music Initiative</b> is a platform that promotes environmental sustainability in the music and entertainment industry. It works with scientists, music stakeholders, sustainability organizations and artists across the world to develop projects and sustainability models for festivals, events, awards and venues. <sup>29</sup>
AUDIENCE DEVELOPMENT PROGRAMS	No	Niagara Falls does not offer any formal audience development programs.	<b>North by Northeast (NXNE)</b> is held annually in Toronto. Over the course of one week, over 20 of Toronto's live music venues showcase thousands of domestic and international emerging artists. The event aims to make great music accessible and inclusive with low cost full festival passes, as well as single night, single venue tickets.
NIGHT TRANSPORT	No	As of January 1st, 2023, transit is a consolidated regional service, provided by Niagara Region Transit. Service for the City of Niagara Falls includes: 1) fixed route bus service; 2) OnDemand service and 3) specialized transit. The City of Niagara Falls is also serviced by WEGO, a year-round transportation system that connects all Niagara Parks locations to major attractions and hotels in the Niagara Falls tourist district. <sup>30</sup> Taxi and Uber are relied upon for night transportation. <sup>31</sup>	<b>Local governments across the United States</b> are partnering with ride sharing services, such as Lyft and Uber, to address challenges associated with late-night transportation services. One example can be seen in Pinellas County, Florida, where the Pinellas Suncoast Transit Authority (PSTA), the region's public transportation provider, partnered with Uber, Lyft, United Taxi and Wheelchair Transport to launch the Transportation Disadvantaged (TD) Late Shift program and the Direct Connect Program. These programs provide low-cost late night transit options for qualifying residents.
AGENT OF CHANGE	No	Niagara Falls does not have an 'Agent of Change' policy. Agent of Change policies hold the entity that creates a change in an area responsible for the impact this change can have in that area. With respect to music, usually, the Agent of Change either requires the building that arrives the latest (be it the music venue or the residential development) to soundproof adequately to avoid nuisances and complaints and/or to inform the new residents that they are moving next to a music venue or within an entertainment area which permeates noise.	<b>The City of Toronto</b> implemented an Agent of Change policy in June of 2018. <sup>32</sup> To ensure that live music venues can continue to function without noise-related impacts on new residential developments, new live music venues must minimize noise from the premises and provide acoustic attenuation measures, while new mixed-use developments must include acoustic attenuation measures to mitigate noise levels from adjacent live music venues and from outdoor live music venues and notify purchasers, lessees and tenants of possible noise that may arise from its proximity to a live music venue. <sup>33</sup>

TOPIC	IN PLACE?	CURRENT POLICY	BEST PRACTICE
UNIONS AND ASSOCIATIONS	Yes	The Niagara Region Musician's Association is the local chapter of the Canadian Federation of Musicians (CFM). <sup>34</sup> Though they are not city-specific, other relevant associations include the American Federation of Musicians of the United States and Canada (AFM) and the Society of Composers, Authors and Music Publishers of Canada (SOCAN).	<b>The Canadian Federation of Musicians</b> represents a best practice example of how an association can advocate for better working conditions for musicians. In 2021, the City of Hamilton formalized fair payment of musicians who perform at city-led events, by enacting the Musicians Fair Payment Policy, which supports and increases community awareness of the importance of paying musicians fairly. <sup>35</sup> The policy ensures musicians hired for city-led events are paid, at minimum, the current minimum annual rates established by the Canadian Federation of Musicians, who are represented locally by the Hamilton Musicians Guild Local 293.
OUTDOOR ADVERTISEMENT FOR MUSIC	No	Except in certain exceptional cases, any individual looking to erect an advertisement in the city must apply for a Sign Permit from the City of Niagara Falls. <sup>36</sup>	<b>The City of Vancouver</b> offers free access to transit shelter advertising space for non-profit arts and culture organizations through the Transit Shelter Advertising Program. Organizations are only required to pay for and arrange the posters. <sup>37</sup>
LOADING AND UNLOADING ZONES	No	The City of Niagara Falls does not currently offer special parking permits for music venues in the city.	In 2018, the <b>City of Ottawa</b> launched a Musician and Artist Parking Permit. <sup>38</sup> The permit allows musicians to load and unload their equipment when parked in a loading zone or no parking zone near the venue's entrance, and to leave vehicles displaying the permit unattended for up to 15 minutes. <sup>39</sup>
GAMING AND CASINOS	Yes	In Niagara Falls, the Fallsview Casino Resort includes the OLG Stage at Fallsview Casino, a new state-of-the-art 5,000 seat venue, as well as the 1,500 seat Avalon Theatre.	During July and August of each year, <b>Casino Peralada</b> , a casino housed in a fourteenth-century castle in the northeast of Spain, hosts the Castell de Peralada Festival. The venue hosts a variety of music events, including outdoor concerts in the castle gardens, as well as recitals, chamber concerts and small-format operas in the auditorium, church and cloister areas of the casino. Founded in 1987, the Festival is regarded as one of the major arts events of the summer in Peralada, and is well regarded for both its artistic events and unique venue.
LOCAL MEDIA	No	There is no programming or journalists dedicated solely to covering arts and culture in Niagara Falls.	<b>Cult MTL</b> is an English language daily web and monthly print publication that focuses on music, arts and culture in the City of Montreal. Content published by Cult MTL includes interviews with local and visiting artists, promoters, and entrepreneurs, as well as analysis and criticism of local arts, culture, and nightlife. <sup>40</sup>



# 3. ECONOMIC IMPACT SUMMARY



## NIAGARA FALLS MUSIC ECOSYSTEM ECONOMIC IMPACT KEY FINDINGS

The economic impact analysis provides a reliable measure of the economic importance of the music ecosystem within the local economy on three different scales: direct, indirect and induced impacts.

### DEFINITIONS

#### Direct Economic Impact

The direct impact is the economic activity directly connected to the music ecosystem, such as musicians, agents and venues.

#### Indirect Economic Impact

The indirect impact is the economic value and employment generated by suppliers to the music ecosystem due to demand generated by the music ecosystem. With respect to music, indirect economic impact is generated by the businesses that provide goods and services to the local music ecosystem, such as advertising, legal affairs, food and beverage suppliers.

#### Music Ecosystem Output

The economic value produced by the sales of goods and services related to the music ecosystem. For example, concert ticket sales, recording studio services, etc.

#### Gross Value Added (GVA)

The output minus intermediate consumption. Intermediate consumption refers to the costs of all inputs. For example, food and beverage suppliers, legal services, transportation costs, equipment, etc.

#### Labour Income

Labour income includes the wages and salaries and employers' social contributions as well as the labour income of unincorporated sectors.

#### International Imports

International imports show the value of the output that is produced with imports from outside of Canada.

Niagara Falls' music ecosystem generated and supported a total of **897 jobs**<sup>41</sup>, representing **2.01%** of local employment. The total output<sup>42</sup> generated by the music ecosystem was **\$107.0 million** and the total gross value added (GVA)<sup>43</sup> was **\$52.9 million**.

The economic value generated directly by the music ecosystem's activities resulted in the creation of **708 jobs**, representing **1.59%** of total employment in Niagara Falls, with a GVA of **\$32.9 million** and direct output of **\$69.2 million**.

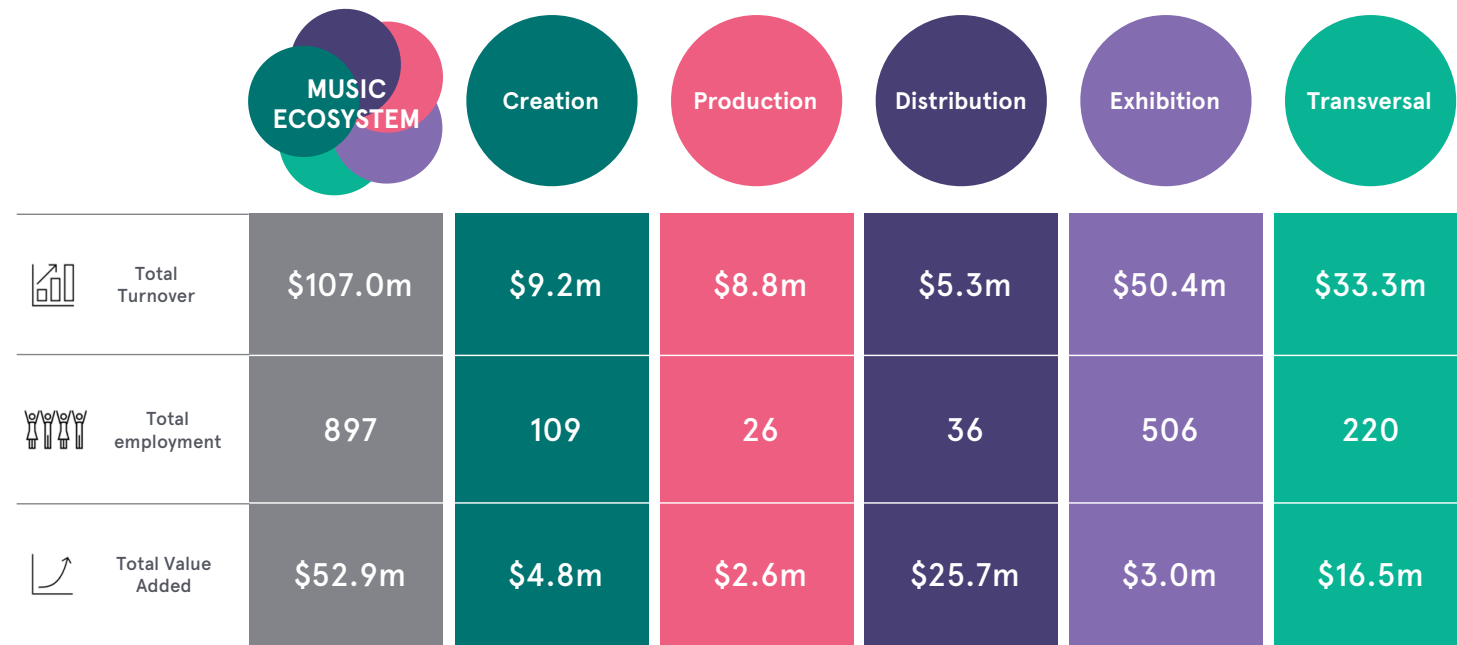
For every \$1,000 of output generated by the music ecosystem in Niagara Falls, there is an additional **\$546** of output generated in the local economy.

TYPE OF IMPACT	EMPLOYMENT (NUMBER OF JOBS)	OUTPUT (MILLION \$)	GROSS VALUE ADDED (MILLION \$)	LABOUR INCOME (MILLION \$)	INTERNATIONAL IMPORTS (MILLION \$)
Direct	708	69.2	32.9	25.9	8.3
Indirect	189	37.8	20.0	11.9	3.5
<b>Total Impact</b>	<b>897</b>	<b>107.0</b>	<b>52.9</b>	<b>37.8</b>	<b>11.8</b>

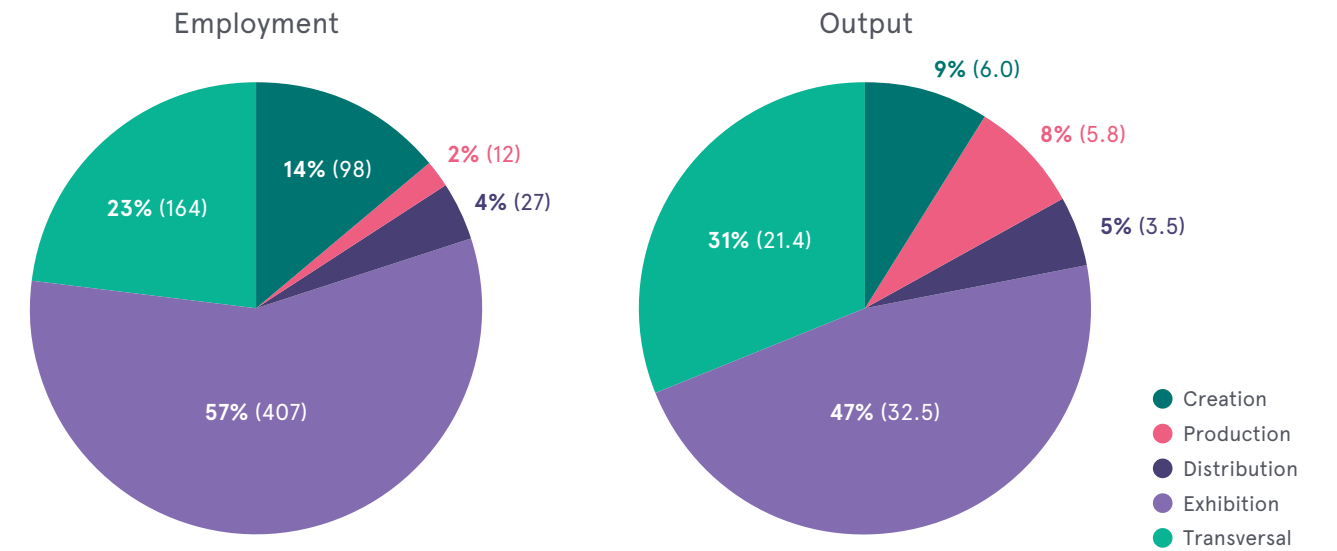
Developed by: Sound Diplomacy



## TOTAL ECONOMIC IMPACT BY VALUE CHAIN LINK

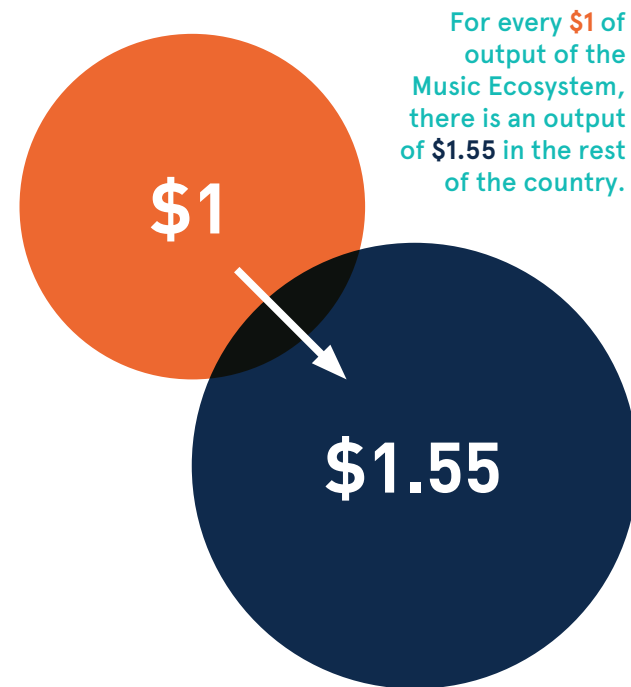


## DIRECT EMPLOYMENT AND DIRECT OUTPUT BY VALUE CHAIN LINK



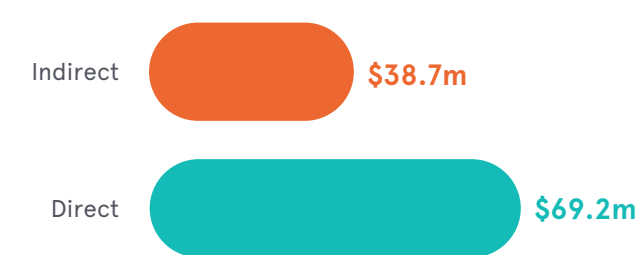
Developed by: Sound Diplomacy Research

## TOTAL MULTIPLIER EFFECT

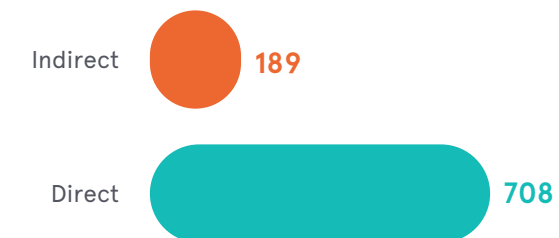


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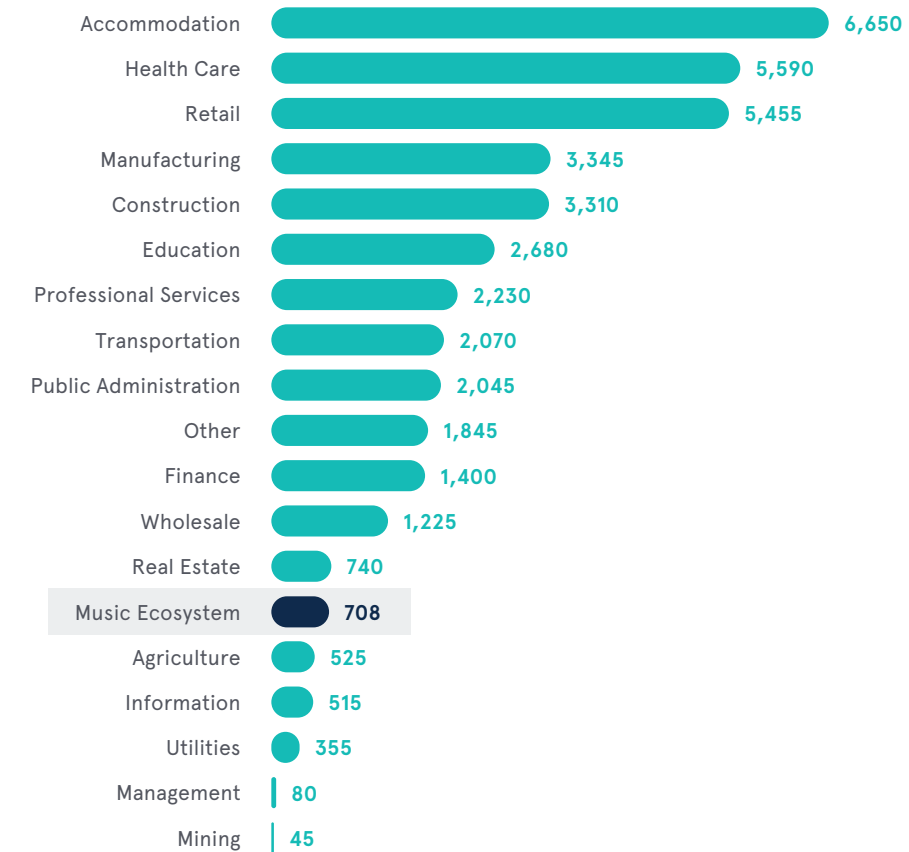
## TOTAL MUSIC ECOSYSTEM OUTPUT (MILLIONS)



## TOTAL MUSIC ECOSYSTEM EMPLOYMENT



## DIRECT EMPLOYMENT BY INDUSTRY, NIAGARA FALLS



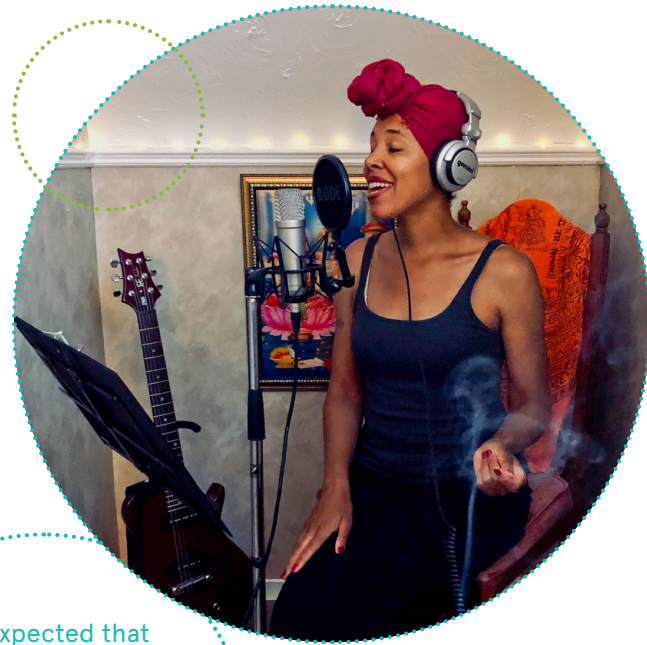
Source: Townfolio, Sound Diplomacy Research



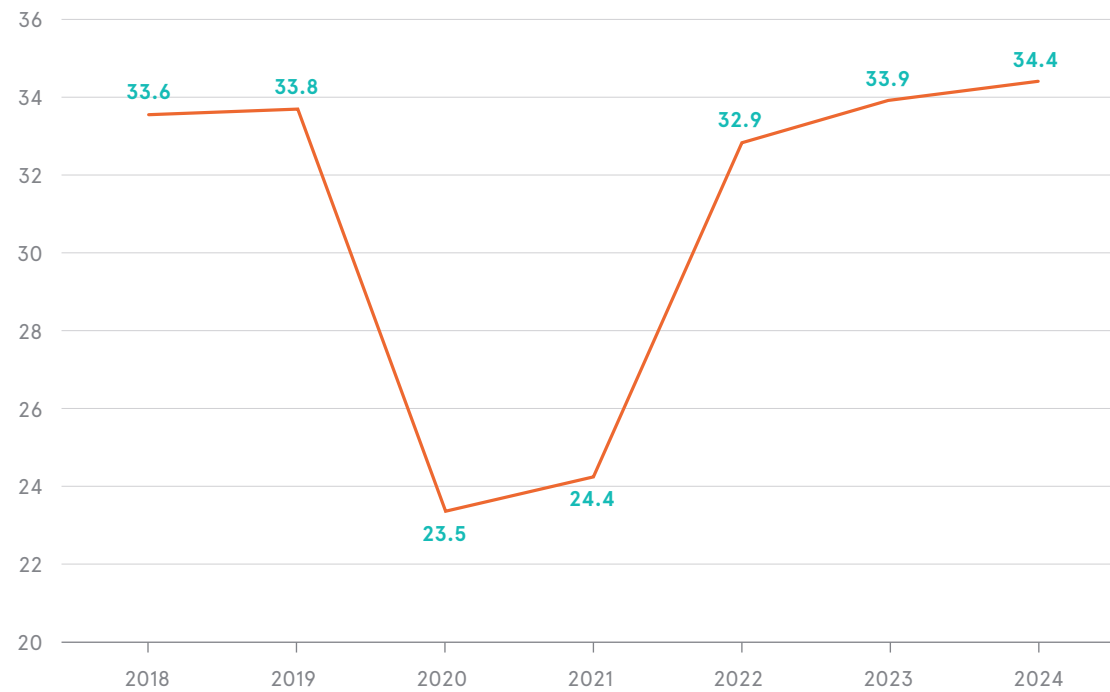
**MUSIC ECOSYSTEM BETWEEN 2018-2024**

The graph below shows the development of the **direct GVA produced by Niagara Falls' music ecosystem over the period from 2018 to 2024**. In 2020 and 2021, the GVA fell sharply due to restrictions related to COVID-19, which impacted the music industry in a major way. The GVA fell from **\$33.8 million to \$23.5 million**, a decrease of **30.5%**. By 2022, the local ecosystem had largely recovered, with a GVA of **\$32.9 million**.

It is expected that the GVA of the music ecosystem will slightly surpass the pre-pandemic GVA level by 2023. The GVA will continue this growth in 2024, to a level of **\$34.4 million**.



GVA OF NIAGARA FALLS MUSIC ECOSYSTEM BETWEEN 2018 AND 2024



Source: Conference Board of Canada, Sound Diplomacy Research

# 4. MAPPING





# HIGHLIGHTS

There are 187 music-related assets in Niagara Falls.<sup>44</sup>

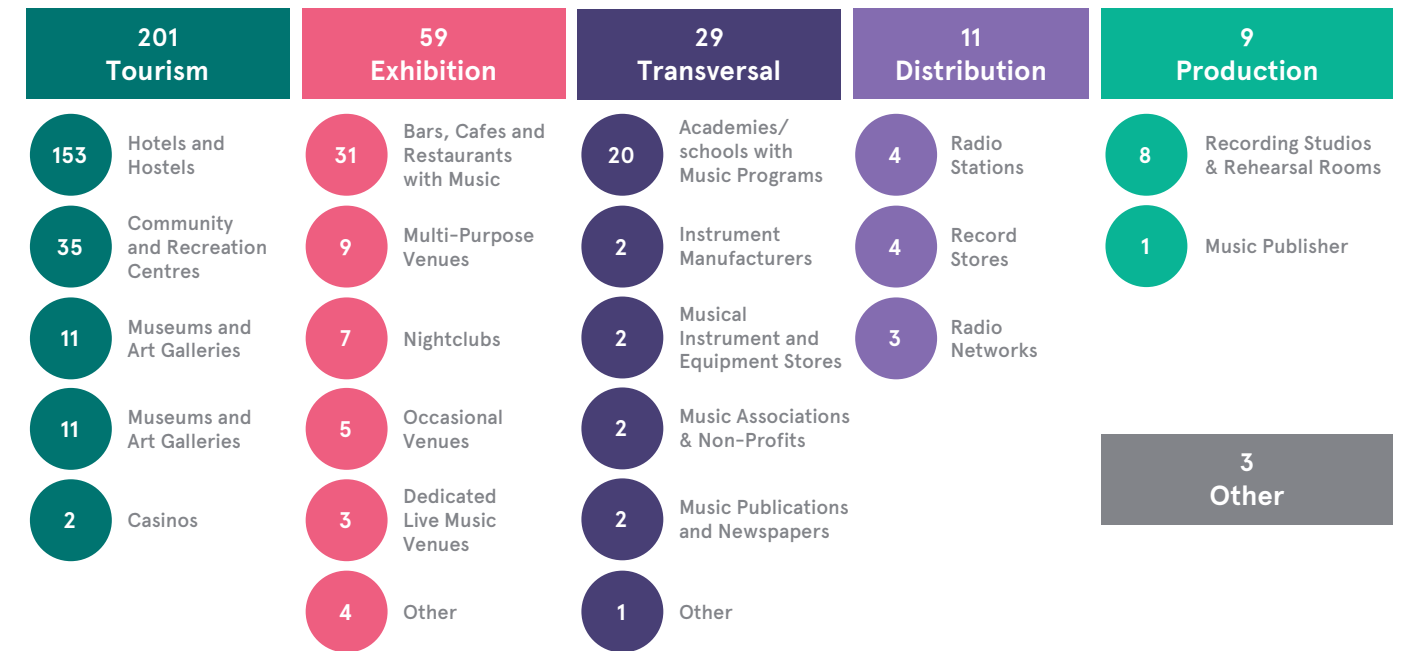
Despite the fact that the number of assets related to music exhibition are relatively high, only 6% of those assets have infrastructure suitable for live music; the majority of the spaces that host music in Niagara Falls are bars, cafés, and restaurants with live music (31), representing 60% of the music venues in the city.

Spaces like cafés, restaurants with music, and occasional venues usually do not have the infrastructure that performers require (i.e. lighting, stage, sound), when compared with the facilities that dedicated live music venues or multi-purpose venues provide.

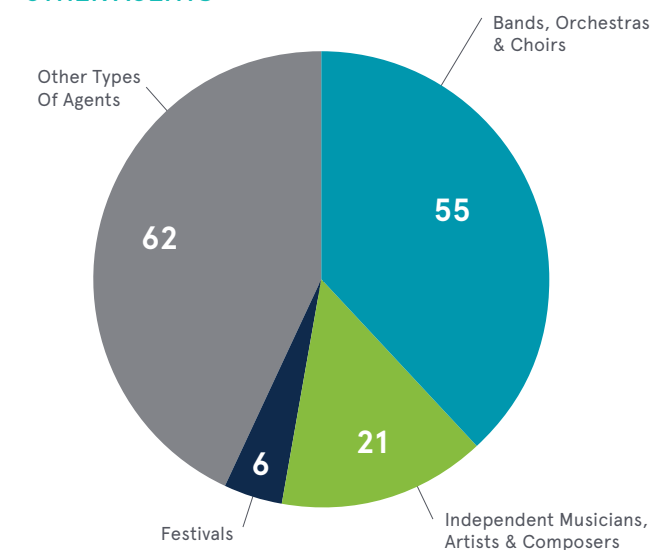
The low availability of intermediaries such as music publishers and record labels, music managers, and bookers and programmers is an indication of a low level of professionalization in Niagara Falls' music ecosystem. These types of agents are essential to intermediate between music creators and other stakeholders in the music ecosystem, allowing creators to monetize their music-related activity.



## VALUE CHAIN LINK AND ASSOCIATED AGENTS



## OTHER AGENTS

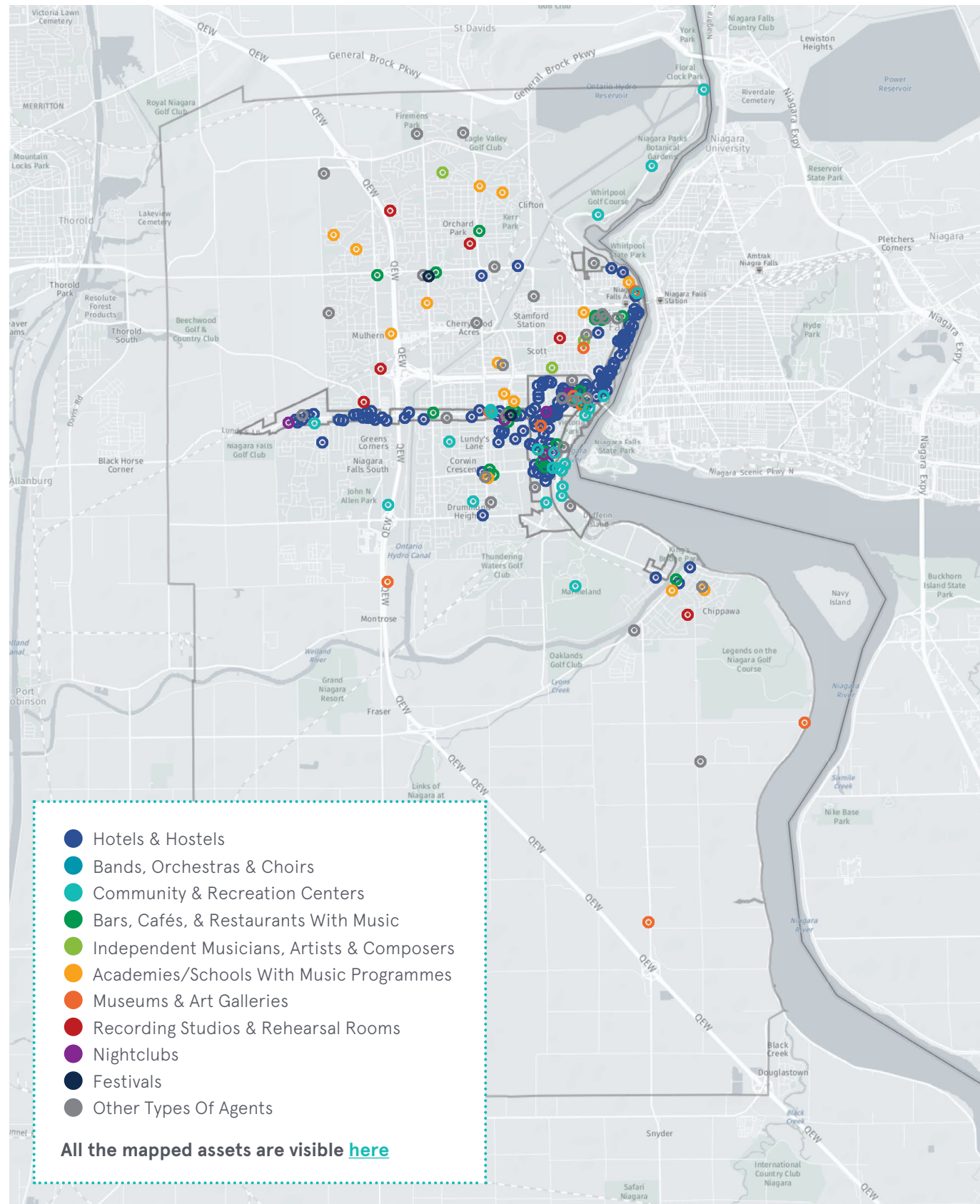


Development by Sound Diplomacy





# 5. SWOT



Source: Sound Diplomacy







## STRENGTHS

### EXISTING TOURISM DRAW

Niagara Falls is uniquely positioned to incorporate music into its overall brand as a tourism destination, as it already possesses a significant tourism draw tied to the city's emphasis on family entertainment, gaming, and the natural wonder of the falls themselves. The city already contains a great deal of the needed technical capacity and infrastructure needed to host large events, and has a well-established history of doing so.

### LOCAL TALENT

The city has no shortage of local musician talent to draw upon in the fostering of an organic music ecosystem, and the local music scene possesses both the quality and activity required of such an ecosystem.

### COMMUNITY

There is a desire from the local Niagara Falls community to see the city become a music destination.

### VENUES

Though Niagara Falls lacks dedicated music venues, the newly constructed OLG Stage possesses a great deal of potential as a 5,000-seat theater.

### NOISE BYLAW EXEMPTION

The city noise bylaw provides exemptions for the tourism core, which is beneficial to allow for music events that extend into the evening hours.

### TECHNICAL CAPACITY

Due to its history as a destination for tourism, Niagara Falls has successfully hosted large scale events in the past, and has the technical knowledge to host events that require complex logistical planning.

## WEAKNESSES

### LACK OF NOTORIETY AS A DESTINATION FOR MUSIC

Niagara Falls' reputation as a tourism destination comes from a rather fixed understanding of what the city is and should be. The city has historically been a destination for gaming and entertainment, but not live music. Presently, there is a lack of cohesive marketing efforts for music, and the city does not maintain a specific office or position concerned with music.

### PERCEPTION OF MUSIC

Historically, business and industry leaders have not understood the full value of music in the community.

### CITY FUNDING

The Niagara Falls Cultural Development Fund offers opportunities to local creatives, but its overall inflexible structure works against evolving, multi-year projects.

### TALENT PROFESSIONALIZATION

Niagara Falls has a lack of professional development opportunities for local talent, and as such there is low professionalization among local artists. Since the vast majority of local musicians are cover bands that perform at bars and restaurants, there is no clear career trajectory as a musician. This leads to many local musicians giving up on their careers or leaving the city.

### LACK OF INTERMEDIARIES

The music ecosystem's production and distribution chains are limited, with a lack of recording studios, music labels, and support businesses.

### MUSICAL DIVERSITY

At present, there is a disconnect between the programming of local artists and their potential audiences within the city. This disconnect is reflective of an overall lack of public openness to diverse music genres.

### TRANSIT

There is a lack of late-night public transit that would make local music events accessible to tourists and residents.

### LIMITED VENUES

Artists in the community face a limitation of opportunities to perform live in the city due to a scarcity of dedicated live music venues. Those venues that do exist are too focused on return on investment and show risk aversion, making it difficult for any artist that is not already well-established to make use of the venues that do exist.

### VISION

There is a lack of a cohesive vision and strategy for the city. Niagara Falls does not have an existing Music Strategy or a dedicated body (Music Office or similar department) committed to leading the local music sector.

### BUSKING

There is no city-wide busking policy currently in place in Niagara Falls.





# OPPORTUNITIES

## TOURISM

Niagara Falls' well-established tourism sector offers unique opportunities. The city has a large audience to draw upon for music events, rather than having to attract net-new audiences. In addition, the city has robust accommodation infrastructure and the capability to handle the logistics related to managing crowds and traffic created by large-scale music events.

## LOCATION

Niagara Falls' geographic placement in a highly trafficked region makes it a strong tourism draw for residents of the Golden Horseshoe, New York State, and beyond. The city already possesses a strong tourism brand with many options for visitors, and that brand could be expanded to include music tourism.

## NIAGARA FALLS EXCHANGE

Construction is complete on the Niagara Falls Exchange, which has the potential to bring smaller, locally-minded performances to the community. Though the Niagara Falls Exchange is not dedicated solely to music, the opening of the building represents an opportunity to harness the local music ecosystem and attract musical tourism. The building could harbor spaces for community initiatives through music, representative of the local demographics.

## CASINO

The city's association with the casino and gaming industry offers significant venue and event-planning infrastructure.

## CLUSTERING

Presently, the central hub of the city's accommodations and tourist attractions are near existing music assets, making integration of music within the currently operating tourism industry geographically convenient. Since assets in the tourism core are clustered together, the area is very walkable and well-suited to acting as an Entertainment District for the city.

## AVAILABLE SPACES

Niagara Falls has an over-abundance of abandoned and under-utilized real estate that could be repurposed for short-term music venues and events.

## AFFORDABLE HOUSING

Rising housing prices in nearby cities are pushing Canadians from markets such as Toronto (and now Hamilton), to Niagara Falls. The migration to the area has the potential to create previously unavailable audiences for local music.

## NATIONAL PUBLIC FUNDING

To reinvigorate Canada's live music sector post-COVID, the Government of Canada committed funding in 2021-22 to help Canada's live music sector weather the pandemic, and additional investments in Canadian music artists and entrepreneurs in 2022-23 and 2023-24.



Image © Franciscus Mangundap/Unsplash



# THREATS

## PROXIMITY TO LARGER MARKETS

Being so closely located to significant Canadian and American locales means that Niagara Falls' music ecosystem faces stiff competition from competing markets. The city's music market is presently small and lacks the impact needed to compete with these markets. Artists have difficulty in obtaining cross-border performance visas, meaning that American markets like Buffalo are more likely to capture potential audiences, which has the added effect of contributing to artist migration to the United States. Relatedly, the proximity of Hamilton and the Greater Toronto Area makes performance overlap unlikely. Surrounding cities have significantly

more music infrastructure in terms of production, distribution, and exhibition meaning that local artists have to travel for performance opportunities, quality recording studios, and record labels.

## DEPENDENCE ON CURRENT TOURISM MODEL

Niagara Falls has a very successful tourism industry tied to the falls and casinos, but such a narrow focus produces the potential for economic instability and variability. The casino and tourism industry plays a central role in decision making, and their aversion to risk makes change difficult, especially when there is a low perceived value of music amongst decision makers. This results in an overarching division

between tourists and residents that poses a threat to a developing music ecosystem that would work to attract and support both audiences.

## COOPERATION

Overall, the greatest threat to a potential music ecosystem is the lack of collaboration and cooperation amongst the city's various actors. Unity concerning the city's shared music goals and potential for growth is needed for the full application of music to the city's many attributes.



## 6. KEY FINDINGS



## 6. KEY FINDINGS

### MUSIC TOURISM

**Tourism is a key strength of the Niagara Falls economy; the many tourists that visit Niagara Falls each year are a unique area of advantage for the local music sector. The city has the potential to simultaneously capture new tourists with music and better promote and integrate existing local music events with tourism offerings to increase the frequency and length of tourism stays, maximizing tourism's benefit to the local music sector.**

Insights gathered through stakeholder engagement made it clear that the city's actors are motivated to use music to drive tourism and vice versa. Stakeholders spoke of using music year-round to drive tourism, attracting new visitors to Niagara Falls and increasing overnight stays.

Mapping illustrates that music venues, likely due to sharing an audience with tourism attractions and accommodation, tend to be located in the areas of the city designated for tourist activities. Moreover, two of the three dedicated music venues in the city, the OLG Stage at Fallsview Casino and the Avalon Theatre, are part of the Fallsview Group and located within less than a kilometre of one another.<sup>45</sup> The Greg Frewin Theatre, with a capacity of 1,000, also falls within this region. Although the Niagara Falls' Zoning By-law includes provisions for places of entertainment, there is no formalized Entertainment District written into the Zoning By-law.<sup>46</sup>

The map on the next page shows that in Niagara Falls, music and tourism assets are concentrated in a very small geographic area of the city, with a dramatic difference in availability in other regions of the city; the darker the shade of red, the higher the concentration of assets in the district.

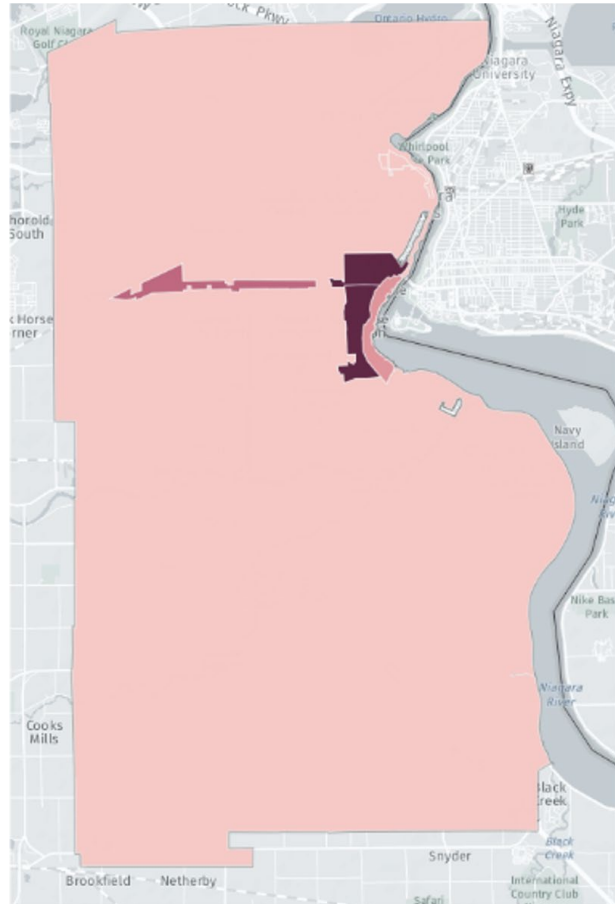


Image © Helen Filatova/Adobe Stock

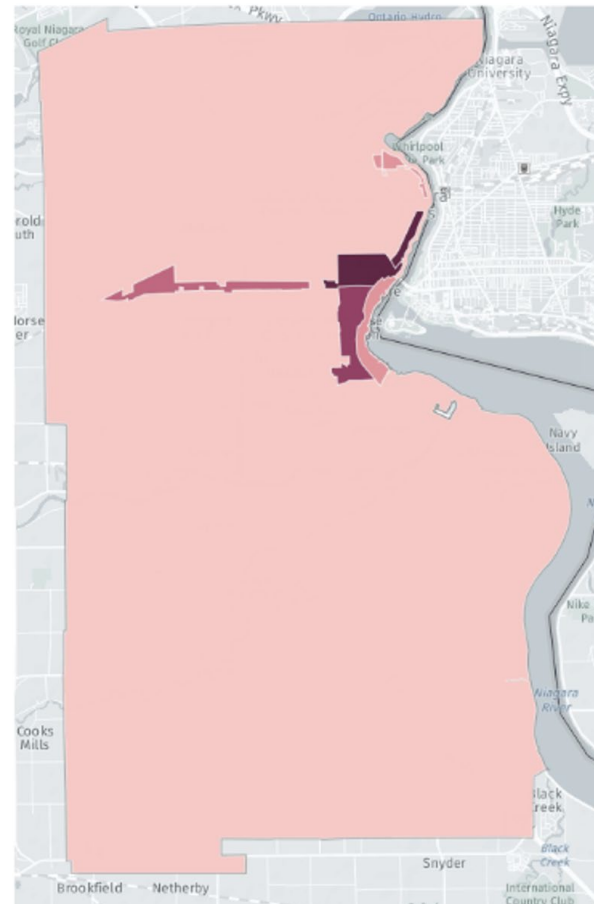


## DISTRICT DENSITY HEATMAPS: MUSIC AND TOURISM ASSETS IN NIAGARA FALLS

Music Ecosystem Assets



Tourism Assets



Developed by Sound Diplomacy

Stakeholder engagement also unearthed a notable lack of music-centric marketing efforts in the city. Stakeholders expressed the challenges created by the lack of awareness and recognition of Niagara Falls as a destination for music. This is in part due to the lack of advertising efforts for the city's music scene, as all stakeholders agreed that there is not enough marketing or advertising focused on music. Roundtable discussions aligned with findings from the survey, where 48% of musicians and artists and 58%

of businesses and organizations reported skills gaps related to knowledge of marketing, social media and audience insights. These skill gaps are likely preventing a unified and effective marketing strategy for Niagara Falls' music scene. Without a robust and well-promoted music offering, tourists may feel that the entertainment options are limited and may be less likely to stay in Niagara Falls for an extended period or return for repeat visits. This would result in a lost opportunity for the local economy.

Economic analysis revealed that the largest driver of employment in Niagara Falls is the accommodation industry. Moreover, tourism stakeholders, as well as festival and event organizers, expressed interest in bundling accommodation and music events. By offering bundled music and accommodation packages, both the music and accommodation industries stand to benefit from the diversified offering and increased visitor numbers that can be generated by this partnership.

## SPACES AND PLACES AND THE NIAGARA FALLS EXCHANGE

Having an adequate and diverse array of performance venues is essential to hosting live music events and accommodating a variety of genres and audience sizes.

Findings from the mapping exercise showed that the majority of the city's musical exhibition takes place in spaces that were not designed to host live music events, and largely occurs in bars, cafés, and restaurants with live music. Spaces like cafés, restaurants with music, and occasional venues often do not have the infrastructure that professional performers require (i.e. lighting, stage, sound), although they can offer opportunities for emerging artists to perform publicly.

The survey showed that music fans perceive the quality and availability of live venues in the city as being low (rating below 2.5). In addition, 27% of musicians and artists and 31% of businesses and organizations expressed the desire for government support to provide more exhibition infrastructure in Niagara Falls (i.e. dedicated music venues). Economic analysis showed that music exhibition is the largest generator of income for Niagara Falls' music ecosystem, which suggests that an expansion of suitable infrastructure to host live music events has potential to generate significant economic returns.



Image © Gilberto Mesquita/Adobe Stock



## THE NIAGARA FALLS EXCHANGE

The Niagara Falls Exchange is a city owned and operated 10,000 square-foot market and cultural hub, strategically located in the Main and Ferry neighbourhood. The Exchange is home to indoor/outdoor multipurpose event space, which includes the Niagara Falls Farmers' Market, event hosting space, artist studios, and more.<sup>47</sup>

Most survey respondents perceived the Niagara Falls Exchange as a fundamental asset for the city and as a contributor to the support for creative businesses. Moreover, across all three audience segments surveyed, the local music ecosystem believed that the Niagara Falls Exchange will

have a positive impact on supporting and improving quality of life, as well as attracting and retaining talent in Niagara Falls. Survey respondents believe that performance should be at the heart of the Niagara Falls Exchange. Of those surveyed, 86% of respondents believed hosting music events would be a key contributor towards the goals of attracting and retaining talent, improving quality of life, and supporting creative businesses in the city.

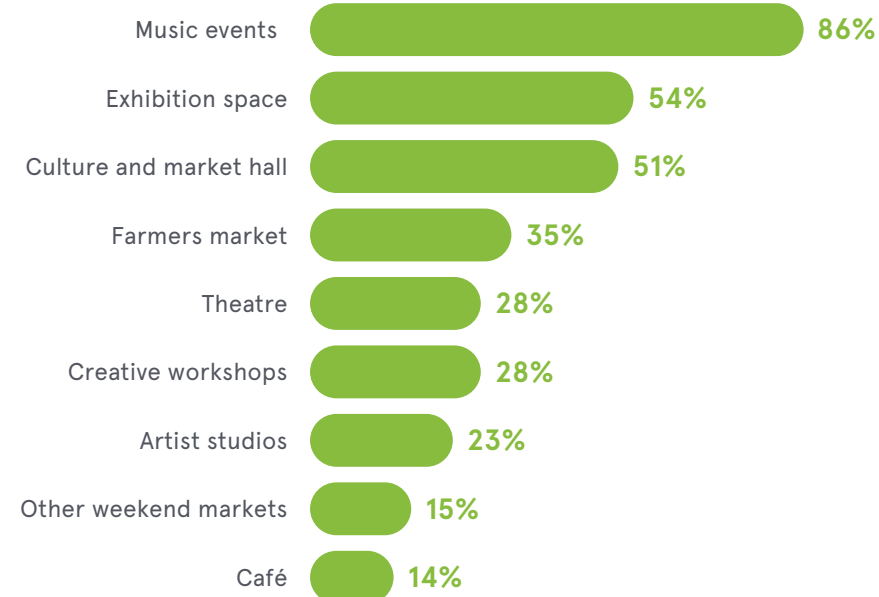


Image © Jeff Baker

As a city-owned facility dedicated to arts and culture, the Niagara Falls Exchange has the potential to serve as an anchor institution for the city's music ecosystem. In addition to serving as a performance space for the city's musicians, with strategic programming, the Exchange can host music workshops, seminars, and networking events and become a hub for music-related activities.

### TOP RATED ASSETS FOR THE NIAGARA FALLS EXCHANGE

Assets in Niagara Falls Exchange that, on average, the local community believes will be the most impactful in attracting and retaining talent, improving quality of life and supporting creative businesses.



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## GOVERNANCE AND LEADERSHIP

### Governance and leadership are key to the effective implementation of Niagara Falls' Music Strategy.

Though the city has a well-established tourism sector, research revealed the lack of a cohesive city-wide vision for the local music sector. Prior to the development of this report, Niagara Falls did not have a city music strategy or any staff dedicated to the local music sector. Moreover, insights from stakeholder engagement with leaders across Niagara Falls revealed a culture of working in silos, but a desire to improve communication and coordination between the city's actors. During the roundtables, all stakeholders agreed that this music strategy is key to improving coordination amongst the city's actors.

As well, building and maintaining partnerships has been a roadblock to growing Niagara Falls as Canada's Entertainment Capital. This lack of partnership is evident, for instance, in the difficulty Niagara Falls Tourism has faced in initiating and maintaining momentum for Niagara Falls Music Live, a week-long event showcasing local, Ontario, and Canadian talent across Niagara Falls, despite shared benefits with partners. Stronger partnerships can be developed by governing bodies dedicated to music, who can work together with other sectors towards shared goals.

Stakeholder engagement sessions also reinforced the view that a dedicated body that could serve as a resource for the city's music community would be a meaningful asset for the local music sector. This sentiment was expressed in both the artists and musicians and event organizers roundtables.

Though the Niagara Falls Music Strategy is a necessary starting point, effective structures must exist to successfully implement it. Since governing bodies create and implement the policies and regulations that shape the creative landscape of a city, they play a pivotal role in establishing frameworks to support the growth of the music industry, protect artists' rights, and facilitate the organization of events. Moreover, effective governance creates an environment conducive to the development of a vibrant music scene through resource allocation, coordination, advocacy, and planning efforts.



Image © Jason Haywood



## FUNDING AND REVENUE MODELS

**Well-designed funding models are crucial to a thriving music ecosystem. When surveying the Niagara Falls music ecosystem, funding was cited as a primary challenge preventing the community from pursuing activities related to music.**

Both musicians and artists, as well as businesses and organizations, ranked access to private and public funding as the most impactful challenge they face within the music ecosystem. The ideation session held with key stakeholders in the city also revealed that funding challenges have prevented stakeholders in Niagara Falls from holding these events, which could be opportunities to showcase the city's ample local talent, as well as exhibit talent from outside the city.

As well, survey data showed that only 31% of businesses and organizations and 16% of musicians and artists received public funding over the past two years (2021-2023). Research into the funding landscape revealed

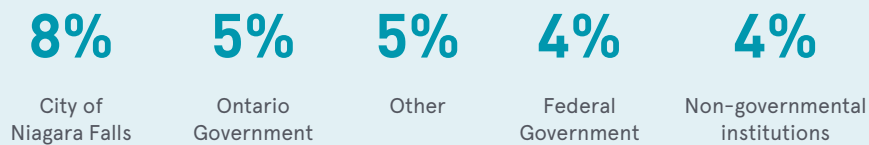
that a number of funding sources exist at the provincial level, including the Ontario Music Investment Fund, overseen by Ontario Creates<sup>48</sup>, as well as numerous music-specific funding programs managed by the Ontario Arts Council.<sup>49</sup> In addition, the Federal government has made additional budget commitments to support live music. As such, the low percentage of individuals receiving funding must be due, at least partly, to a lack of awareness of available funding options. The lack of awareness must be addressed to make the Niagara Falls music ecosystem more self-sustaining.

Survey findings also showed that two of the main skill gaps in the music ecosystem are in business and financial management (40% of musicians and artists and 61% of businesses and organizations), as well as fundraising (33% of musicians and artists and 44% of businesses and organizations).

### SOURCES OF FINANCING (IN THE PAST TWO YEARS)

**16%**  
of musicians and artists received public financing

SOURCES



**31%**  
of businesses and organizations received public financing

SOURCES

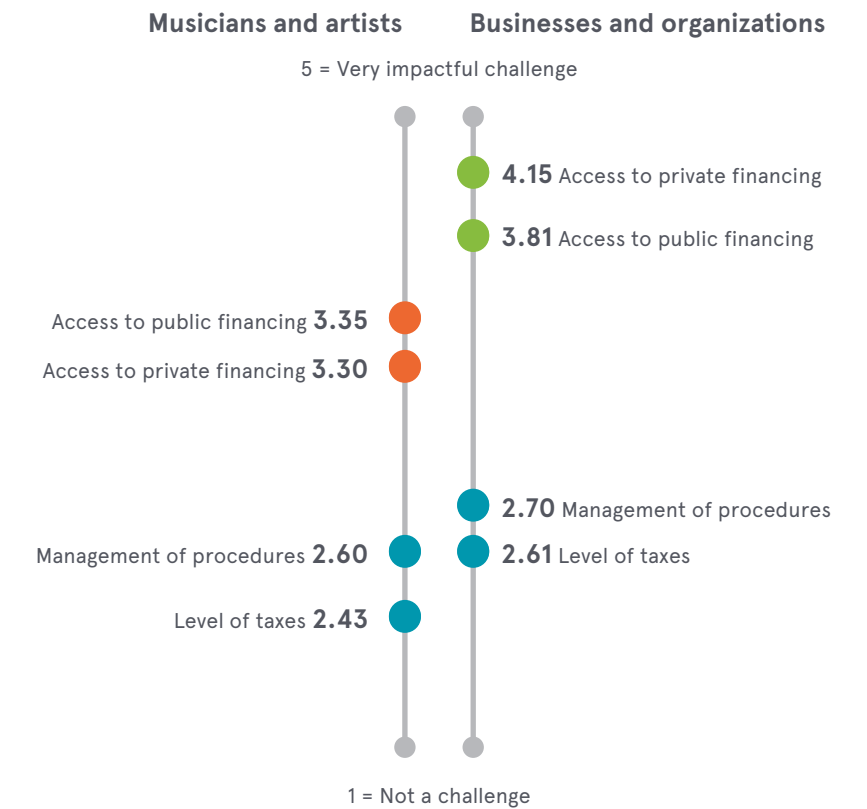


In addition, stakeholder engagement revealed disappointment amongst the music community over how limited in size and scope the Niagara Falls Cultural Development Fund is, as the fund has no sustainability and it is not oriented to the development of cultural ecosystems. As such, it will be necessary for the City of Niagara Falls to reimagine the Cultural Development Fund to improve its ability to support the local music industry, considering its sustainability over the long term and inclusivity principles.

Tracking government investment and revenue generation in the music sector also allows city leaders to assess the return on investment, identify areas of improvement, and make informed decisions for future planning. This ensures that resources are allocated to areas that have the greatest impact, such as supporting emerging artists, building necessary infrastructure, and promoting music tourism, which can attract further investment from external sources.

### CHALLENGES WITHIN THE MUSIC ECOSYSTEM

Rating on how much each area represents a challenge to their activity within the music ecosystem.





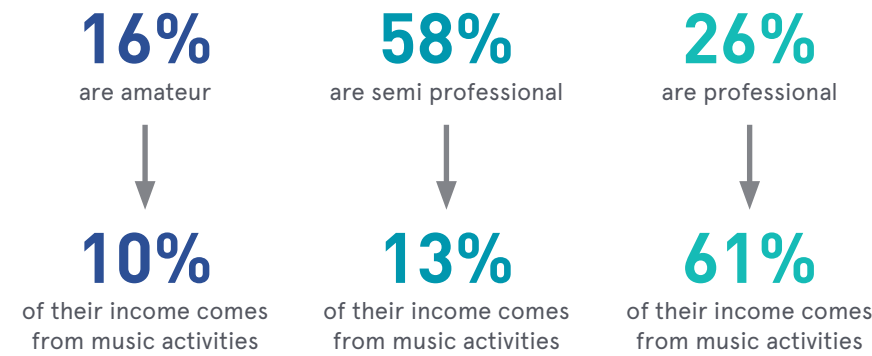
## ARTIST DEVELOPMENT

Research revealed a lack of fair pay for artists working in Niagara Falls' music ecosystem, as well as a lack of exhibition opportunities. Both these activities are important to ensure that musicians are able to garner income from their music-related activities.

Survey findings demonstrated that 74% of the music creators who responded to the survey considered themselves amateurs or semi-professionals, who receive an average of only 10-13% of their total income from activities related to music. Local musicians and artists also did not rate managers, bookers, record labels, or copyright management organizations as stakeholders relevant to their success in the sector. However, these intermediaries are essential to facilitate relationships between music creators and the diverse stakeholders in the music ecosystem, allowing musicians to monetize their music-related activity.

## PROFESSIONALIZATION AND INCOME FOR MUSICIANS AND ARTISTS IN NIAGARA FALLS

### MUSICIANS AND ARTISTS: PROFESSIONALIZATION AND INCOME



Moreover, economic analysis showed that the average income for individuals working in Niagara Falls' music ecosystem was \$36,582 annually. This is below the average income per-capita in the Niagara Falls region, which equaled \$45,321 in 2022.<sup>50</sup> The creation link, which includes musicians, bands, orchestras, choirs and composers, with \$26,531, and the exhibition link, including music venues, live events, and festivals with \$34,889, have an average labour income that is below even the average annual salary for the music ecosystem.

Musicians and artists reinforced these findings during stakeholder engagement sessions, stressing challenges around receiving adequate pay from local bars and restaurants. Additionally, many artists work as independent contractors and often do not have access to benefits like health insurance or retirement plans.

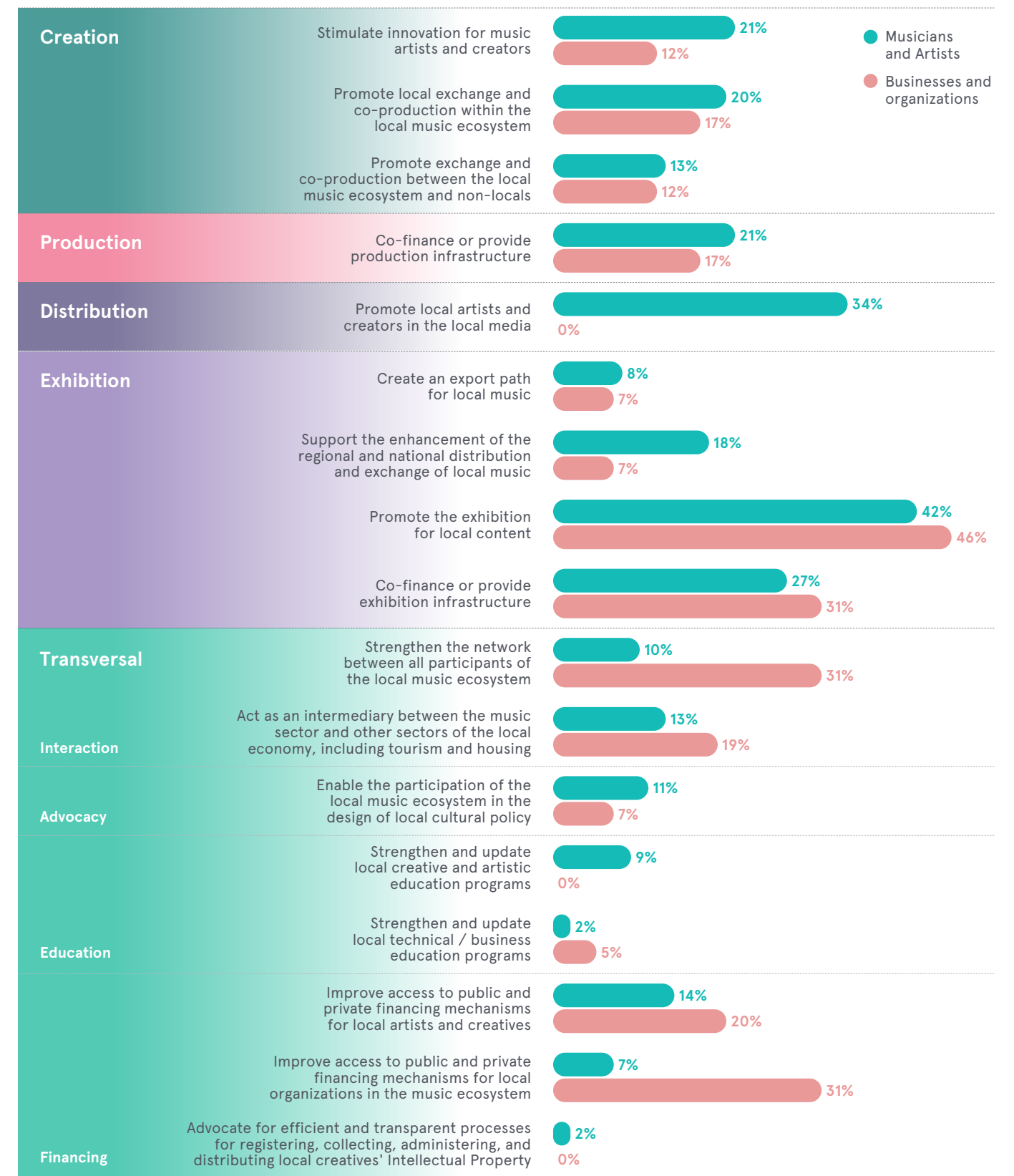
Musicians and event organizers who participated in stakeholder engagement sessions also expressed the belief that many of the bookers and venue operators in the city are too focused on their return on investment. A focus on booking acts strategically to maximize the venue's

return on investment translates into shows featuring more established artists that venues know will generate substantial ticket sales. This climate makes it challenging for independent event producers to operate, necessitating city intervention to foster the development of events focused on spotlighting lesser-known local talent in Niagara Falls.

Survey findings also showed a strong preference for the government to support the exhibition of local content. According to responses gathered from the survey, 42% of musicians and artists and 46% of businesses and organizations want the government to promote the exhibition of local content. These findings are depicted in the graph below.

In addition, survey respondents emphasized the need for local venues to better utilize local talent by providing opportunities for new and original music. Although many of the city's bars already feature live music, roundtables revealed the difficulties artists face getting a foot in the door. Fostering the exhibition of local music can address this gap in the music scene by allowing artists more opportunities to perform in the city.

## PREFERENCES FOR GOVERNMENT SUPPORT FOR THE NIAGARA FALLS MUSIC ECOSYSTEM



Developed by Sound Diplomacy





Image © Jason Haywood

## MUSIC SECTOR AWARENESS

Research revealed that members of the Niagara Falls music ecosystem are often not capitalizing on existing resources because they are unfamiliar with what supports are available to them, limiting the extent of musical activity in the local ecosystem. Survey data revealed that less than a third of the city's local musicians and artists (28%) are part of any associations within the music sector. It was found that this is mainly due to a lack of awareness, with 41% of the segment indicating that they do not belong to a professional association because they do not know of any.

Education, mentorship, and resources that help musicians and other members of the music ecosystem navigate the industry can help to facilitate the development of the local music sector. By providing guidance on aspects such as available funding, assets and services, which local actors may not be aware of, the local music sector will be better equipped with the necessary knowledge and tools to pursue successful music careers.

## MUSIC-FRIENDLY REGULATORY FRAMEWORK

**In Niagara Falls, 65% of music businesses and organizations that responded to the survey indicated that noise regulations pose the greatest difficulty for their activities.**

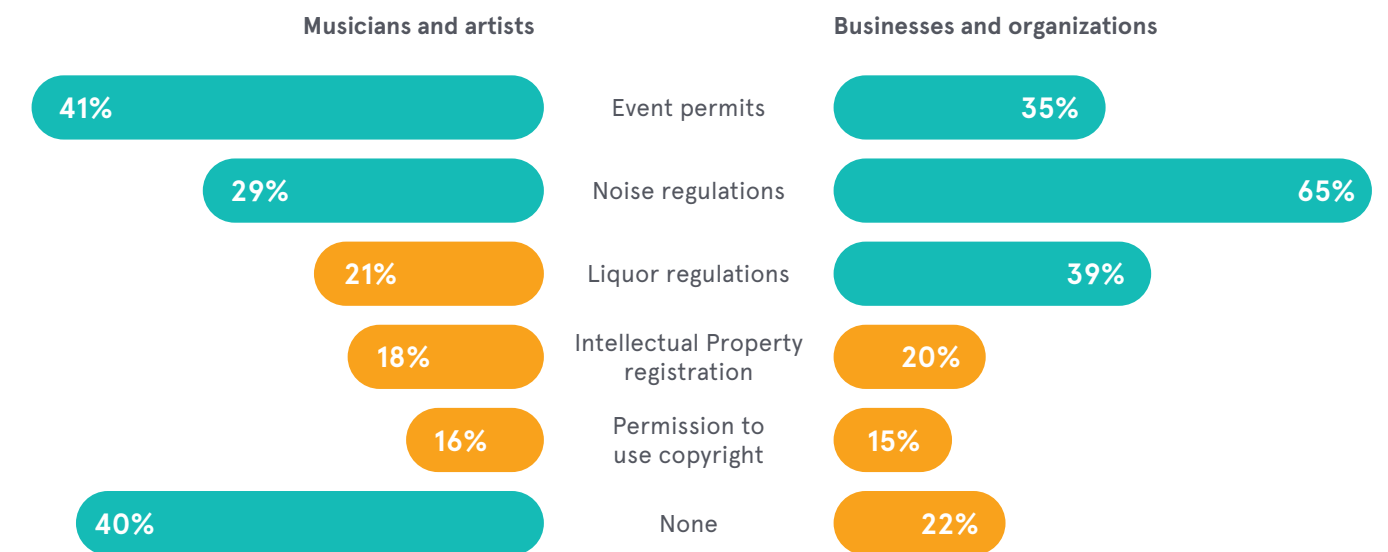
Although the city's existing noise by-law includes exemptions for noise in the downtown core of the city, which is heavily trafficked by tourists, findings from the regulatory assessment show that noise restrictions for all other parts of Niagara Falls come into effect at 9:00 p.m. This could pose a significant challenge for music businesses and organizations that do not operate in the city's tourism core.

Stakeholders also expressed the potential a program that allows for musical street performances could have for developing the city's music community. Though exemptions currently exist for busking that occurs during licensed special events, Niagara Falls prohibits

busking under normal circumstances. However, the city stands to benefit greatly from a program that places buskers in highly trafficked areas.

Moreover, the current noise by-law does not outline decibel limits, stating only that noise should not be "clearly audible at a point of reception located in a residential area of the municipality within the prohibited time".<sup>51</sup> This is subjective, and thus hard to follow and enforce. In addition, Niagara Falls does not have a formal process for how noise complaints are managed. Clear procedures for noise complaints, including processes for escalating complaints, greatly facilitate venues' ability to understand rules related to noise, allowing them to more easily host music events. As such, it is necessary to revisit the city's Noise Control By-law to ensure that it is more music friendly.

### CLASS OF LICENSE OR PROCEDURE THAT POSES THE GREATEST CHALLENGE TO MUSIC-RELATED ACTIVITIES



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Image © Ryan Campbell

## AUDIENCE DEVELOPMENT

**Audience development refers to the strategic process of expanding and engaging a target audience for music activities.** Engaged music audiences require constant nurturing, especially when it comes to the younger generations who will make up the future audiences. Audience development involves efforts to attract a wider audience. When implementing audience development programs, special attention should be paid to audiences that identify as Indigenous and other historically marginalized communities.

Research revealed a slight disconnect between audiences and local artists in the Niagara Falls music ecosystem, necessitating a focus on audience development measures. Analysis of survey responses showed that local audiences believe that the quantity and quality of local artists

can be improved; however, local music organizations and businesses and artists and musicians rate the quality and availability of local musicians and artists very highly. These findings suggest that Niagara Falls does not lack homegrown talent, but that local music fans are unaware this talent exists, likely due to a lack of opportunities for exhibition. These findings were reinforced during stakeholder roundtables. As such, efforts to build awareness of local musical offerings amongst Niagara Falls' music fans are necessary to remedy this. By creating opportunities for music fans to see local artists perform in Niagara Falls, the city stands to improve the perception of local music amongst local audiences.

# 7. RECOMMENDATIONS





# 7. RECOMMENDATIONS

0-12 MONTHS

1-2 YEARS

2+ YEARS

## MUSIC TOURISM

### RECOMMENDATION #1

#### Formalize an Entertainment District in Niagara Falls

Capitalize on the existing clustering of music and tourism assets and further promote the development and implementation of regulation that fosters diverse music entertainment offerings in Niagara Falls by formalizing an Entertainment District within the city.

### RECOMMENDATION #2

#### Develop a Music City Brand and Marketing Campaign for Niagara Falls

Build a distinct brand for Niagara Falls as a vibrant music destination and launch a music tourism campaign to draw in tourists seeking out live music performances, festivals, and cultural experiences and increase visibility, recognition, and prestige for Niagara Falls' music ecosystem.

Create the Brand

Promote the Brand

Connect the Brand to Specific Tourism Activities

Further Develop and Promote the Brand through Strategic Partnerships and collaborations

### RECOMMENDATION #3

#### Partner with Hotels and the Casino to Bundle Music and Hotel Packages

Form a partnership between the City of Niagara Falls, and the city's hotels, entertainment providers and the casino to offer packages that combine music and entertainment events with accommodation for a fixed price.

### RECOMMENDATION #4

#### Attract New Visitors by Launching a Large-Scale Winter Music Event

Create a large-scale winter music event to draw in new tourists, regionally, nationally, and internationally, embrace the charm of the winter season, and celebrate the unique landscape of Niagara Falls.

0-12 MONTHS

1-2 YEARS

2+ YEARS

## SPACES AND PLACES AND THE NIAGARA FALLS EXCHANGE

### RECOMMENDATION #5 Repurpose Unexpected and Underutilized Spaces for Music

Take advantage of the city's abandoned and underutilized spaces by repurposing existing spaces to facilitate music events. This will build out infrastructure that can host live music in Niagara Falls, which can help address the need for mid-size venues in the city.

### RECOMMENDATION #6 Develop the Niagara Falls Exchange as a Local Hub for Music

Develop the Niagara Falls Exchange to serve as an anchor institution for the city's music ecosystem. This will involve creating a space for local music exhibition, as well as offering strategic programming and services, allowing the space to serve as a hub for music-related activities and foster community engagement.

Develop a Year-Round Offering of Music Events at the Exchange that Spotlight Local Performers

Organize Music-Focused Networking Events

Offer Professional Development Opportunities for Musicians

Offer Equipment Rentals for Musicians at Affordable Rates

Develop One of the Artist Spaces into an Affordable Professional Studio/Rehearsal Space

Partner with Neighbouring Building Owners and Property Developers to Expand the Exchange's Available Spaces for Performance

## GOVERNANCE AND LEADERSHIP

### RECOMMENDATION #7 Create a Music Advisory Task Force

Support the creation of a Music Advisory Task Force. The Niagara Falls Music Advisory Task Force will supplement the current gap in governance that exists across the Niagara Falls music sector by working in close contact with music stakeholders across the public and private sector to help them carry out their goals and maintain awareness of the needs of the local music community.

### RECOMMENDATION #8 Develop a Strategy for Appointing a Music Officer and Creating a Music Office

Develop a strategy to create a dedicated body to bridge the gap between government, the local music industry, and other sectors of the economy and serve as a resource for the local music ecosystem.



0-12 MONTHS

1-2 YEARS

2+ YEARS

**FUNDING AND REVENUE MODELS**

**RECOMMENDATION #9**

**Make the Niagara Falls Cultural Development Fund More Music Industry Friendly**

Increase musicians' access to funding and reinforce their ability to create and implement music projects locally through direct financial support by updating the Niagara Falls Cultural Development Fund. Proposed changes include increasing the total pool of funds available, expanding the scope of what funds can be used for, and relaxing requirements for eligibility.

**RECOMMENDATION #10**

**Establish a Per-Capita Funding Target for Municipal Investment in the Local Cultural Sector**

Establish a minimum spending target for cultural services at the City of Niagara Falls to increase per-capita funding and investment in the local cultural sector. A benchmark that, at minimum, puts the city on par with similarly sized municipalities across Ontario ensures that Niagara Falls has the funds committed to the local cultural sector that are needed for it to develop and grow.

**RECOMMENDATION #11**

**Increase Cultural Funding Through Existing Revenue Streams (Hotel Tax)**

Add a 25 cent surcharge to hospitality and tourism related taxes in Niagara Falls to partially fund economic development initiatives, grants for music, music events and efforts to promote and encourage tourism. This will also diversify existing funding sources and raise new money to support music programming and creators.

**ARTIST DEVELOPMENT**

**RECOMMENDATION #12**

**Implement a "Fair Play" Policy for Artists**

Enact a Musicians Fair Payment Policy for city-sponsored events or events held on city property with minimum annual rates established in partnership with the Canadian Federation of Musicians, who are represented locally by the Niagara Region Musicians Association, Local 298. In tandem, establish a "Fair Play" badge program for venues and promoters that comply with "Fair Play" principles to receive a certification and help them receive city funding for music events and initiatives.

**RECOMMENDATION #13**

**Create a "Local Talent Showcase" Initiative**

Launch a program that brings the Music Officer, the Music Advisory Task Force, and local music schools to create dedicated showcases, performance opportunities, and provide mentorship for emerging local artists.

0-12 MONTHS

1-2 YEARS

2+ YEARS

**MUSIC SECTOR AWARENESS**

**RECOMMENDATION #14**

**Create a Directory/Map of Music Resources**

Launch an online directory and map of music resources. The directory should include information on local services connected to the music ecosystem, including music businesses, music service providers, and artists. These resources will serve as a centralized database of information, allowing individuals and organizations locally, nationally, and internationally to easily find and connect with local music businesses and artists. The directory will also make it easier for members of the sector to connect with one another, encouraging collaboration across the local music sector.

**RECOMMENDATION #15**

**Collaborate with Niagara Falls Tourism to Consolidate and Promote the City Calendar of Music Events**

Partner with Niagara Falls tourism to develop and promote a calendar of music events in the city that consolidates information on all local shows and events. The calendar should include events of varied sizes and genres, to raise awareness for all the musical activities taking place in Niagara Falls and allow for better coordination among live music professionals by publicly communicating information on other happenings in the city.

**RECOMMENDATION #16**

**Develop a Centralized Hub for Music-related Regulations, Licenses, Grants and Funds Administered by Public and Private Organizations**

Launch an online "hub", a centralized resource that contains information on music-related grants and funds available to artists, as well as information and links to guide licensing and permitting processes related to hosting music events. This will facilitate access to transparent information about available funding opportunities and improve the user experience associated with navigating required licensing and permitting processes.



0-12 MONTHS

1-2 YEARS

2+ YEARS

## MUSIC FRIENDLY REGULATORY FRAMEWORKS

### RECOMMENDATION #17

#### Update and Rename the "Noise Control By-law" to Improve Perspectives and Processes related to Amplified Sound

Continue the Noise Control By-law exemptions for specific areas of the city that experience high traffic and hold significant importance to Niagara Falls' thriving tourism and music sector and conduct consultations to potentially expand the exempted area of the city. Develop a formal process for handling noise complaints, as well as decibel limits and guidelines for where decibel readings should be taken. Rename the 'Noise Control By-law' to the 'Sound By-law'. Launch a pilot to extend the curfew for outdoor music on weekends.

### RECOMMENDATION #18

#### Introduce a Street Performance Program in Tourist Hotspots

Create and implement a successful musical street performance program, by providing a framework outlining the time, locations, and permits required for participation in the program. This program will capture foot traffic from tourists, provide opportunities for local musicians and performers to perform publicly, and contribute to the perception that Niagara Falls is a city teeming with music.

## AUDIENCE DEVELOPMENT

### RECOMMENDATION #19

#### Launch a "Music Passport" Program

Provide a membership to Niagara Falls' residents that encourages attendance to shows, exhibitions, tours, events and festivals by offering discounted access in an effort to grow music appreciation and consumption among locals. To capture as many individuals as possible, there should be several tiers to membership as well as free access to a weekly 'what's on' newsletter that provides information on upcoming shows.



Image © Jason Haywood



# 7. CONCLUSION



Image © Jason Haywood

Niagara Falls is already a tourist hub, well-known for its impressive waterfall, casinos, amusement parks, and array of tourist attractions that attract millions of visitors each year. The wide array of non-musical options for tourists visiting Niagara Falls has historically taken center stage, which presents an opportunity for the city's music scene to grow.

**Investing in music-related initiatives can play a key factor in diversifying the tourism offerings in Niagara Falls. By providing an additional layer of entertainment, the city stands to attract and engage entirely new audiences. This can extend visitor stays, encourage repeat visits, and attract new segments of tourists interested in music and cultural experiences.**

Research conducted to develop the Niagara Falls Music Strategy has revealed that the city has the capacity to incorporate music into its overall brand as a tourism destination, especially since the city benefits from unique infrastructure and technical capacity stemming from its history as a tourism destination. Niagara Falls has hosted large-scale events successfully in the past, and there is the appetite from both the local community and city leaders needed to transform the local music scene.

The presence of effective governance structures with clearly defined roles within Niagara Falls' music ecosystem will spearhead action for the sector. Improvements to funding for the local music sector, through measures to increase awareness and availability of funding for local musicians and event producers, will create a funding environment that enables more local musical activity. Strategic initiatives that provide support for skills development and opportunities for exhibition will promote the development of local artists. Revamping regulation to ensure it is music-friendly will support the successful creation and implementation of music events and programming, as will creating more spaces for music in Niagara Falls. Last, but certainly not least, capitalizing on the value of the Niagara Falls Exchange and finding synergies between

the music and tourism sector will harness Niagara Falls' unique strengths, differentiating the local music scene from other cities.

Through these strategic actions, Niagara Falls will address current gaps in the local music sector, while simultaneously harnessing the city's unique assets and history. This will allow the city to develop a unique music ecosystem unlike anywhere else, cementing its reputation as the entertainment capital of Canada and drawing in both tourists and residents for years to come.



## ACKNOWLEDGEMENTS

Sound Diplomacy would like to thank every individual who worked with us, took an interest in the report, responded to the survey, attended a roundtable and shared information. Your participation and input has been invaluable and the work could not have been done without it. Thank you.



## ABOUT SOUND DIPLOMACY

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Sound Diplomacy is a global research and strategy consultancy committed to building and supporting sustainable ecosystems that bring economic development to people, places and cities. They provide research and recommendations to businesses and policymakers to help them make informed decisions on the best use of places and how to stimulate economic, social and cultural growth. Sound Diplomacy's team of economists, analysts, researchers and consultants is based across the UK, Europe, North America and Latin America and has delivered results across six continents, in over 100 cities and 25 countries. For more information, please visit [www.sounddiplomacy.com](http://www.sounddiplomacy.com)

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Funded by:  
Federal Economic Development  
Agency for Southern Ontario

Financé par :  
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