

PHILADELPHIA MUSIC INDUSTRY TASK FORCE

REPORT AND RECOMMENDATIONS



AUGUST 2019

PHILADELPHIA MUSIC INDUSTRY TASK FORCE REPORT AND RECOMMENDATIONS

GUIDING PRINCIPLES:
MISSION STATEMENT

FORMATION
OF THE
MUSIC INDUSTRY
TASK FORCE

ACTIVITIES
OF THE MITF

City Council
PHILADELPHIA

 **City of Philadelphia**

MITF
MEMBERS



The Music Industry Task Force ("MITF") acknowledges the contributions and dedication of MITF member Jeff Duperon. Jeff worked tirelessly to achieve MITF's goals since inception, but sadly passed away just as this report was being completed. Jeff was a stalwart, knowledgeable and enthusiastic supporter of the arts especially in Philadelphia, his adopted home. The members of the Music Industry Task Force honor his memory and legacy as a longtime member of Philadelphia's music community.

He will be missed.



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EXECUTIVE SUMMARY

The Philadelphia Music Industry Task Force (MITF) was inspired by Councilman David Oh and then established by City Council. The MITF's initial meeting took place on August 12, 2017. The MITF has met regularly, on a monthly basis, and it now presents its report to City Council.

Even though great music is being composed, recorded, and performed in Philadelphia, MITF members recognize that there is much to be done to improve the experiences of both the music creators and audiences. This report lists some of these challenges and issues the MITF has enumerated along with suggestions of how to remedy them. Implementation of the MITF's recommendations will burnish Philadelphia's reputation as a leading center for the creation, recording, publishing, and performance of music. Further, by making Philadelphia an easier place for working musicians to navigate and to ply their trade, the City's economy will be bolstered and its tax revenues increased.



MUSIC INDUSTRY TASK FORCE GUIDING PRINCIPLES: MISSION STATEMENT

The Philadelphia Music Industry Task Force (MITF) is charged with fostering the development of music making and music makers in the City of Philadelphia. The MITF was established to recognize, honor, and foster the continued growth of Philadelphia's music scene by cultivating new opportunities and reducing barriers for its musical artists and music industry; and by promoting awareness in the general public of the achievements and activities of Philadelphia's music community.

FOREWORD BY MITF CHAIRMAN DAVID IVORY

Understanding the importance of the music industry to the economy and cultural life of Philadelphia, while simultaneously recognizing the many challenges that face Philadelphia's music makers, I'm proud to be a part of this amazing group of music professionals that together took on the challenge of identifying the issues and recommending the appropriate changes and policies that can foster the music business and economy of the great music city of Philadelphia.

The MITF is made up of a cross section of Philadelphia's music business elite. Included in its ranks are producers, promoters, entertainment attorneys, composers, publishers, and, of course, performers. Its members work in every genre of music--from rock and roll to concert music, folk to "Philly soul" to jazz. They bring their unique vision, sharpened by years of real-life experience and higher education in music performance, music composition, and music business, to the MITF.

Too often, we have found that musical artists who reach star status have moved away from Philadelphia to Los Angeles, New York and Nashville--cities that are more receptive and supportive of their working artist musicians. The MITF wants to initiate bold actions and new policies that will reverse this trend. Its goal is to cultivate and re-establish Philadelphia as a hub for music professionals and, by extension, a travel destination for visitors to our city.

I am honored to serve as Chairman of this blue-ribbon group. We have worked with great passion to measure the needs of Philadelphia's music community and set a path to accomplish our goals.

BACKGROUND

In addition to its universities, fine restaurants, diverse neighborhoods, wonderful museums, world-class health care and a plethora of historically significant sites, Philadelphia is recognized worldwide as a center for music in many genres. Philadelphia's Curtis Institute of Music is regularly ranked as one of the world's very best classical music conservatories, along with the Julliard School in New York, the Conservatory of Music in Paris and the Royal College of Music in London. Indeed, the Curtis Institute has trained a significant number of musicians working as members and section leaders of orchestras around the world, the conductors of those orchestras, and the soloists who are featured with them.

Classical music, however, is not the only genre that sets Philadelphia apart. The Philadelphia region is arguably the place where rock music began. In the 1950s and 1960s, Philadelphia was home to two major national record companies (Chancellor and Cameo Parkway) and Dick Clark's American Bandstand television program. The Philadelphia region has been the home of a diverse list of performers--from Chubby Checker, Marian Anderson, Mario Lanza, Bobby Rydell, Teddy Pendergrass, John Coltrane, and Pat Martino, to The Dixie Hummingbirds, Hall and Oates, Cinderella, Christian McBride, The Roots, Pink, and The War on Drugs. Today, Philadelphia's thriving local music bars, clubs, and coffee houses are major entertainment attractions for young residents and a major selling point for employers bringing new employees to the region. Millennials cite the Philadelphia music scene as one of their primary reasons for permanently moving into the City and making it their home.



ACTIVITIES

OF THE MUSIC INDUSTRY TASK FORCE

Besides meeting regularly to discuss what eventually became this report, the MITF made deliberate efforts to engage the Philadelphia music community. The MITF hosted a mixer at (the former) William Street Common on October 5, 2017, which allowed emerging musicians to meet professional musicians in the industry. During this mixer and after it, the members of the MITF queried musicians to determine the priorities of the music community's members. The information gathered from these inquiries provided the grist for the MITF's work throughout 2018.

The MITF created a temporary website (creativephl.org/mitf/) to raise awareness of the MITF. The website includes biographies and photos of each of the MITF members, the MITF's mission statement, the legislation which created the MITF, and links to other Philadelphia music industry resources.

Furthermore, the MITF took actions to promote the City's music scene on a wider stage. MITF members helped the City gain access to video footage of Philadelphia's music scene which was utilized in the City's bid package for Amazon's second headquarters. This package will be repurposed for future business attraction efforts, and thanks to the MITF, Philadelphia's music scene will be a featured component of the City's allure. The MITF also created awareness which led to more attention being paid to local musicians included in City events, such as Wawa Welcome America and Philly Free Streets.

RECOMMENDED ACTIONS

1. Establish a centralized, independent, permanent entity to continue the mission and the work of the Music Industry Task Force. Properly fostering the development of the music making and music makers in the City of Philadelphia. The MITF members noted the importance of the Greater Philadelphia Film Office to the Philadelphia film industry, our recommendation would be a similar office but supporting the greater Philadelphia Music and Entertainment industry. A centralized music office could be a conduit from tourism to recording, from concert happenings around the city to educational opportunities that are available from various music organizations. This office would be able to supply a unified voice to the public as to the events, concerts and other activities so important in fostering the Music economy here in the greater Philadelphia area.

MITF members noted the importance of the Greater Philadelphia Film Office to the Philadelphia film industry; establishing a similar office for the local music industry would provide a permanent resource to carry out initiatives that are of a larger scope and duration than a volunteer body like the MITF could undertake. The Veterans Advisory Commission, created by the City Council and supported by a full-time staff, is another example of a standing body which provides services to a specific segment of the Philadelphia population. Whether a Philadelphia Music Office or a Philadelphia Music Commission, either would create engagement opportunities in shaping the future of the Philadelphia music economy while growing and preserving our rich musical history.



An entity like a Philadelphia Music Office or a Philadelphia Music Commission would play a dual role as a resource and an advocate for the music community. Like the Greater Philadelphia Film Office, it could provide a consolidated list of internships, co-op opportunities, and jobs to the local music community.

Additionally, it could engage in education initiatives to raise the business knowledge of industry members. As an advocate for the music community to the City at large, it could serve as a convening authority with other Philadelphia entities such as the Chamber of Commerce for Greater Philadelphia and the Philadelphia Convention & Visitors Bureau in a manner akin to Nashville’s Music City Music Council. With a dedicated funding stream, it could sponsor certain activities and help raise funds for others. Given the volume of festivals and concert events Philadelphia, this office or commission could also assist promoters with hiring local talent.

Many of this report’s recommendations involve forming relationships and working together with a broad variety of stakeholders and institutions. The creation of a go-to coordinating entity for the Philadelphia music community would streamline the process of communication between City departments, potential funding sources, and the music community itself in a way that would optimize the Philadelphia music industry’s potential.

2. Market Philadelphia as a Music Mecca. Cities which are frequently cited as capitals of the music world are often deliberately marketed as such. Nashville is “Music City,” while Austin is the “Live Music Capital of the World.” While Philadelphia is widely known as the “City of Brotherly Love and Sisterly Affection,” there is plenty of room for additional marketing to highlight the city as much more, particularly when it comes to music. From Patti LaBelle to Sarah Chang to The Heath Brothers, Philadelphia already has a wealth of globally-recognized talent that often promotes Philadelphia, albeit in a piecemeal fashion. Coordinating this enthusiasm from successful Philadelphia natives and channeling it into a marketing campaign would be an effective means of drawing attention to Philadelphia’s music scene.

The City’s communication channels are a logical, accessible starting point to place a greater emphasis on Philadelphia’s musical heritage, particularly at notable times like April’s Jazz Appreciation Month. Key stakeholders and external influencers such as the Philadelphia Convention & Visitors Bureau should be involved in creating a branding strategy for the City’s music scene, including determining which elements of Philadelphia’s musical heritage to highlight to a greater audience.

3. Promote Philadelphia Music in Local Transportation Hubs. Showcasing music at the Philadelphia International Airport, 30th Street Station, and other local transportation hubs would be a fun, simple way to introduce arriving visitors to the rich and varied legacy of Philadelphia area music and musicians. One logical means of doing this would be to produce a playlist of Philadelphia-produced music from a cross-section of the City’s many genres. MITF also recommends visual and interactive exhibits highlighting the recent and past history of Philadelphia’s

musical life with the goal of regaining the city's position as a world leader in music through attractive displays of its many past and present accomplishments.

Whenever and wherever possible, the City should encourage the playing of live music in transportation stations and Philadelphia International Airport. Numerous cities feature live local music talent in airport terminals, subway stations, and other public gathering places. Selection for these opportunities is a competitive process, which raises the overall reputation of such programs and the artists who participate. Creating, promoting, and permitting these opportunities for local musicians would promote meaningful and positive interactions between musicians and visitors to Philadelphia and provide employment for Philadelphia's professional musicians.

Seattle, Nashville, Austin, Portland, Houston, San Diego, and Pittsburgh are only a sampling of cities that fund live performances in their airports through grant money. In 2012, the Port of Seattle, the Seattle Office of Film + Music, the Seattle Music Commission, and PlayNetwork partnered to create the award-winning Experience the City of Music Program at the Sea-Tac Airport. The airport has daily live performances throughout the airport, overhead music from over 240 artists from around the Pacific Northwest, local music streaming on web radio via the airport's wifi network, videos promoting the city's music scene, and music-themed art exhibits. The Nashville International Airport started a live music program in 1988 and expanded it in 2001. It now produces 700 performances per year across six locations in the airport.

4. Redevelopment of Sigma Sound Studios building (212 N 12th Street) Redevelop the original Sigma Sound Studios building (in Chinatown) into a creative music headquarters for Philadelphia's music community and newly established Philadelphia Music Office. There is already an effort underway to preserve and develop the property into a new space, which would include a new music venue and cafe/lounge on the ground floor, gallery space with rotating exhibits, recommissioning the original recording studio (2nd floor); and most importantly office space for the new Philadelphia Music Office. Having the city's support to operate a new facility like this would speak volumes about the city's commitment to its musical roots and the existing music arts community. A space like this could provide educational and cultural programming for the surrounding neighborhoods and schools and also has potential to generate significant tax revenue for the city.



Philadelphia International Records
Photo Credit: gettyimages



Photo Credit: City of Seattle

5. Develop an Awareness Campaign for Fair Compensation of Working Musicians. The omnipresence of music and the proliferation of amateur musicians sometimes causes a sense in the public that music is performed for free. In truth, performing music is a musician's livelihood. Musicians rely on fair compensation in order to pay for life's necessities. Accordingly, MITF suggests the development of an awareness campaign to alert the public that they should not expect to hire musicians for zero compensation. The proposed awareness campaign will consist of multiple elements in order to reach the widest possible audience, consisting of:

- Radio, television and internet public service announcements featuring well-known musicians and those that hire them;
- Written talking points to be used by MITF members, who will make themselves available for media interviews to discuss this issue.
- Opportunities to participate in and become the subject of "human interest stories" in various media, including, but not limited to print, television, radio and internet.

MITF Subcommittee members have spoken with and interviewed three advertising agencies that are potentially interested in bidding on this proposed awareness campaign. Funding will be necessary to create and promote this awareness campaign.

6. Establish Performing Arts Priority Loading and Unloading Zones. Most musicians are part-time stevedores, as they are often required to cart large, heavy musical instruments, amplifiers, loudspeakers, public address systems, microphone stands, and other equipment to and from each venue in which the musicians rehearse and perform. This task can be particularly irksome when the musician must pay to park their vehicle, sometimes at a great distance from the rehearsal or performance space. It is also important to note that many musical events take place in non-traditional venues, such as houses of worship, schools, impromptu "salons" and "living room concerts" in private homes. According to research undertaken by MITF member Jesse Lundy, many musicians simply reject offers to perform due to the anticipated inconvenience and expense of parking and transporting musical instruments and equipment.

The MITF supports City Council Bill No. 160026, introduced by Councilman David Oh to establish temporary parking areas at certain concert performance venues, allowing artists to quickly load in and out of the venues without receiving parking tickets. In its discussions with full-time music venues, the MITF found that Underground Arts, MilkBoy and the Hard Rock Café felt that they needed help. At its June 12 meeting, the MITF met with Pat O'Donnell from the Streets Department to discuss the mission of the MITF and explain the needs for the loading zone variances. The MITF testified in support of Bill No. 160026 before City Council's Committee on Streets and Services on October 9, 2018.

The Seattle Department of Transportation (SDOT) and the Office of Film and Music (OFM) have worked with local music venues to install the priority load signs at these first four locations serving five music venues:

1. High Dive (Fremont)
2. The Crocodile and Tula's (Belltown)
3. The Triple Door (Downtown)
4. Showbox at The Market (Pike Place Market)

Source: <http://murray.seattle.gov>

7. Identify Sources of Funding for Sustained, Dedicated Efforts to Grow Philadelphia's Music Economy.

Like any other industry, music will not grow in Philadelphia unless it is financially promising. Government can help make Philadelphia a more attractive location for investment in music by offering financial incentives.

Starting with what Philadelphia already has available, local tax incentives could be developed to incentivize producers of large-scale events, such as Made in America, to include more Philadelphia-based talent. The tax abatements that exist in Philadelphia for new construction or rehabilitation should be preserved for the creation of music facilities.

Local officials can also urge state officials to create music production tax credits akin to the preexisting film production tax credits available from the state. For example, Louisiana, Georgia, and other states and municipalities already offer incentive programs for the sound recording and live performance sectors in addition to the television and motion pictures sector. The MIFT suggests working in conjunction with City Council's Philadelphia Film Industry Task Force to accomplish this goal. For a background of how such a tax incentive program might be constituted, see the summary example of the Georgia tax incentive program:

State/Program	Sound Recording Credit?	Music Video Credit? (also can be film production)	Thresholds	Annual Caps	Notes
entIndustryIncentive Programs2018.pdf					production related purchases in Florida
<p>Georgia:</p> <p>Film, Television, and Entertainment Digital Tax Credit http://www.georgia.org/industries/entertainment/production-incentives/</p> <p>HB155- Musical Tax Credit http://www.georgia.org/wp-content/uploads/2017/12/HB155-Music-Tax-Credit-Summary-and-FAQs.pdf</p>	<p>Yes- Musical Tax Credit</p> <ul style="list-style-type: none"> - Income tax credit equal to 15% - An extra income tax credit of 5 %, bringing the maximum possible credit up to 20 % 	<p>Yes – up to 30% transferable tax credit available for “feature films, television series, commercials, music videos, animation and game development”</p> <ul style="list-style-type: none"> - 20 % base transferable tax credit - 10 % Georgia Entertainment Promotion (GEP) uplift can be earned by including an embedded AI logo on approved projects and a link to: ExploreGeorgia.org/Film on the promotional website 	<p>Music Video- \$500,000 min.</p> <p>Sound recording - \$250,000min.</p>	<p>Music Video- No annual cap</p> <p>Sound Recording-</p> <ul style="list-style-type: none"> • \$5 million for 2018 • \$10 million for 2019 • \$15 million thereafter until 2023 <p>No single production may claim more than 20%</p>	<ul style="list-style-type: none"> • Original music scoring eligible for projects produced in Georgia qualify

Amusement Tax on all entertainment tickets purchased in the County. This tax generated \$21,287,000.00 in revenue in Fiscal Year 2018, and \$20,577,000.00 in revenue in Fiscal Year 2017. This revenue enters the City's General Fund and is thus not earmarked for any specific purpose. Given that the Amusement Tax is collected from music fans, MITF respectfully suggests that some of the Amusement Tax proceeds be dedicated to programs which specifically benefit musicians and music industry professionals, in particular the establishment of a Philadelphia Music Office, similar in function to the long-established Greater Philadelphia Film Office.

8. Create Hubs for Music and Concert Promotion Material Distribution. The MITF spoke with Nic Esposito, the Zero Waste and Litter Director for the City, and Department of Licenses & Inspection Commissioner David Perri in February 2018 about the City's efforts to cut down on illegal promotion practices. Such practices, which place unsolicited handbills on vehicles and posters or stickers on utility poles, walls, and other public places ("sniping"), create trash and are haphazard methods of rather ineffective advertising.

The MITF supports the City's proposal to install kiosks around the City where venues can post their promotional materials. Centralized locations featuring public billboards or kiosks where handbills, posters, and similar materials may be placed will have multiple benefits:

- Sniping will be reduced
- Litter from unwanted handbills will be eliminated
- Music fans will have centralized locations where they can meet and find out about future shows

Furthermore, the MITF recommends that recycling containers be placed near the kiosks so that neighborhood block captains who would be policing the kiosks can dispose of the materials in an environmentally responsible manner.

9. Encourage Music Performance Venues to Cater to All Ages. A hotbed of young musical talent like Philadelphia must encourage the development of spaces where audiences of all ages can enjoy performances. The legal drinking age of 21 precludes many young artists from accessing most venues in Philadelphia, particularly those with capacities of less than 250 people, either to perform or be inspired by other performers. If the average college student arrives in Philadelphia at the age of 18, they are not legally allowed into many performances until the third year of their studies. This situation causes one of two effects: either the law is skirted (illegally entering a venue for ages 21 and up), or the proliferation of underground, unlicensed, and often unsafe performances in unorthodox spaces such as house basements, art galleries, and warehouses. Both effects are widespread in Philadelphia.

Opening performances to all ages creates thinner profit margins for venues. Extra security to prevent underage drinking is expensive, and not selling alcohol significantly reduces potential profits. The City should work with its existing, licensed music performance venues to determine what actions may help offset these costs. Potential partners for the creation of new venues, such as local colleges and universities, should also be consulted.



“Drop that poster! Philly to crack down on illegal fliers on poles”

January 22, 2018

Philly.com

Photo by: Jose F. Moreno

10. Utilize the City's Zoning and Development Policies to Benefit the Music Industry. Music has the power to define entire streets and neighborhoods: Los Angeles's Sunset Strip. Nashville's Honky Tonk Highway. New Orleans's French Quarter. For this reason, Philadelphia should consider how it can leverage its zoning and development policies to create more opportunity for musicians and the music economy. Designating a 24-hour entertainment district or an arts corridor would present unique opportunities. Allowing late-night opening hours for entertainment venues and eating and drinking establishments within a certain area, for example, could catalyze the development of a concentration of music venues that Philadelphia currently lacks and would create additional economic opportunities for musicians and other members of the creative economy in Philadelphia.

Other development approaches which have been adopted in other cities to benefit the music industry include the development of affordable housing and incubator spaces for musicians and other artists. Ryman Lofts in Nashville, for example, is a 60-unit affordable development specifically targeted towards the arts community that informally doubles as an incubator space for its residents.

A singular development the City can encourage is that of a Philadelphia Music Hall of Fame. Aside from the Philadelphia Music Alliance's Walk of Fame, Philadelphia currently has few significant memorials to its vast musical legacy. The City can lend its assistance to identify possible sites and convene potential stakeholders to develop a Music Hall of Fame worthy of Philadelphia.



RECOMMENDATIONS SURVEY SUMMARY

OF THE MUSIC INDUSTRY TASK FORCE

Over a 17-month period, the Music Industry Task Force (MITF), created by City Council, met regularly to develop recommendations on how to promote and support the growth of Philadelphia's dynamic music sector. The MITF came up with nine (9) recommendations that they believe would be most impactful on the city's music industry. Before finalizing the recommendations, the MITF surveyed Philadelphia's diverse music community asking for each recommendation whether they strongly agreed, agreed, were neutral, disagreed, or strongly disagreed that the implementation of each recommendation would help to support, promote, and/or strengthen Philadelphia's music industry. The survey also asked members of Philadelphia's music community to rank all nine (9) recommendations in order of most important to least important to their career and to the music industry.

The recommendations in the survey were:

- Establish a centralized, permanent Philadelphia Music Office or Commission to continue the work initiated by the Music Industry Task Force.
- Market the strengths of Philadelphia's rich musical history, and the current boom of music venues and artists.
- Promote Philadelphia music in the city's transportation hubs such as Philadelphia International Airport and 30th Street Station.
- Develop an awareness campaign for the fair compensation for working musicians.
- Establish Performing Arts Priority Loading and Unloading Zones (temporary parking areas at certain concert performance venues that will allow artists to quickly load in and out of the venues without receiving parking tickets).
- Identify sources of funding for sustained, dedicated efforts to grow Philadelphia's music economy.
- Create hubs for music and concert promotion material distribution.
- Encourage music performance venues to cater to all ages.
- Utilize the City's zoning and community development policies to benefit the music industry.

The survey was distributed broadly over a three-week period and received approximately 100 responses. Of the recommendations with which those surveyed strongly agreed, market the strengths of Philadelphia's rich musical history, and the current boom of music venues and artists received the greatest number of "strongly agree" responses at 78.31%. The other two recommendations that received the highest "strongly agree" responses include identifying sources of funding for sustained, dedicated efforts to grow Philadelphia's music economy at 74.44%, and establish Performing Arts Priority Loading and Unloading Zones at 73.1%.

Based on the ranking of the recommendations from the most important to the least important, the survey results indicate that the three recommendations most important to Philadelphia's music industry are:

- Establish a centralized, permanent Philadelphia Music Office or Commission to continue the work initiated by the Music Industry Task Force.
- Develop an awareness campaign for the fair compensation for working musicians.
- Identify sources of funding for sustained, dedicated efforts to grow Philadelphia's music economy.

The MITF believes that if City Council works with members of Philadelphia's music industry and Philadelphia's tourism partners to implement the recommendations of most importance and that the surveyed community members strongly agreed with, that the City of Philadelphia will experience growth economically in the music sector, become a destination for music professionals, and would elevate its the national profile.

CONCLUSION

Philadelphia's music scene has the heritage, the talent, and the momentum to rival any of the other top cities in the country. However, for as much as Philadelphia has done—and that the MITF has worked towards in the past year—the City can still do much more to foster the development of music making and music makers. A deliberate, sustained commitment to accomplishing the tasks recommended by the MITF can make a tremendous difference in the perception of Philadelphia as a music hub.

It is worth emphasizing that it is important to raise the perception of Philadelphia as a music hub, because in many ways that is a current reality. Several of the MITF's recommendations concern ingredients for a strong music culture that Philadelphia already possesses, which makes these recommendations more plausible and logical. Drawing attention to the existing Philadelphia music scene, whether through marketing, street signage, or physical development, will only bolster what many locals already perceive as one of the City's strengths and create new opportunities for growth.

MITF also believes that the local music industry players and the ancillary professionals who assist them could benefit from an economic impact study of the musical arts in Philadelphia. In particular, the focus of such a study should be to discern the answers to multiple important questions, such as (a) How much money the music industry generates for Philadelphia; (b) How the musical prowess of Philadelphia's musicians and their fame can be harnessed to assist in making Philadelphia a more attractive destination for businesses and future employees; (c) How Philadelphia's music is and can continue to be a magnet for visitors and conventions.



MEMBERS OF MUSIC INDUSTRY TASK FORCE



David Ivory (Chairman)

Grammy-Nominated engineer, producer, Recording Academy National Trustee (2012-2016), Director of Sound Recording and Music Technology at Montgomery County Community College



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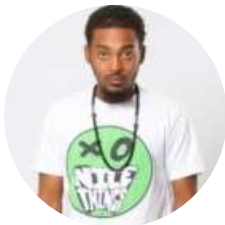
Jesse Lundy

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Eric "Chill" Moody

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Stephanie Seiple

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