

Mayors Hospitality Arts Summit

Presentation by Toronto Alliance for the Performing Arts (TAPA)

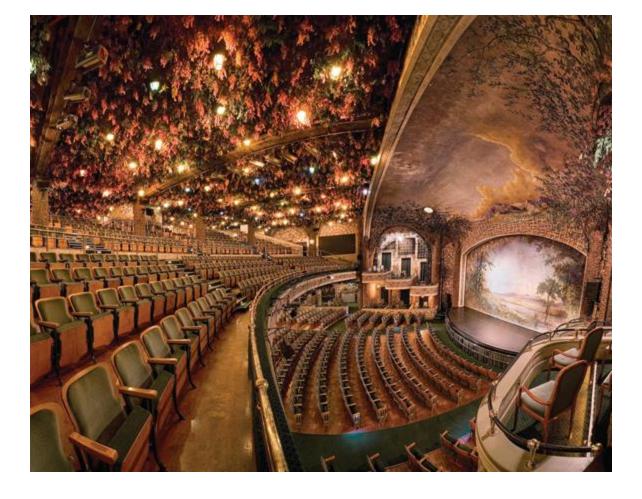
JUNE 25, 2021



Bluma Appel Theatre: T.O. LIVE



Young People's Theatre



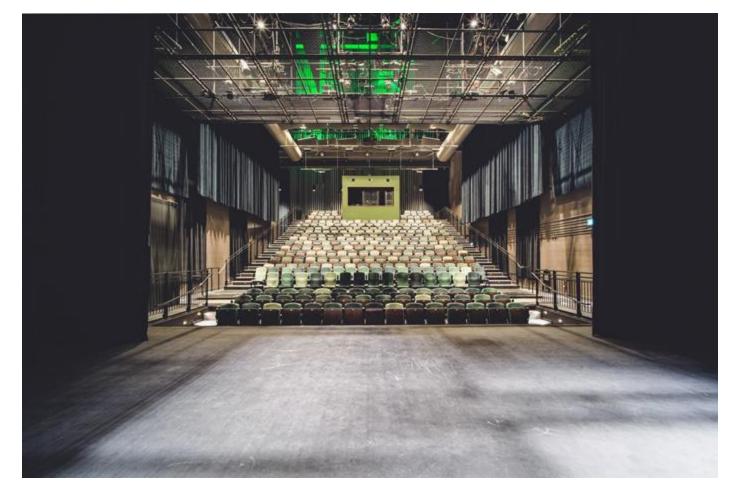
Elgin and Winter Garden Theatre Centre



Theatre Passe Muraille



TO Live - St Lawrence Centre for the Arts - Jane Mallett Theatre



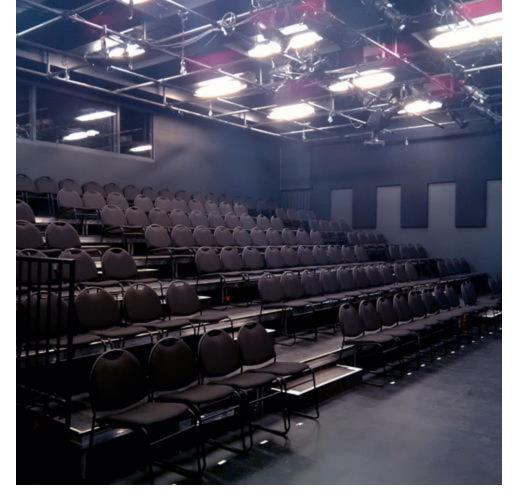
TO Live - Meridian Arts Centre - Greenwin Theatre



Toronto Dance Theatre - Winchester Street Theatre



Sandbox - Artscape



Native Earth - Aki Studio



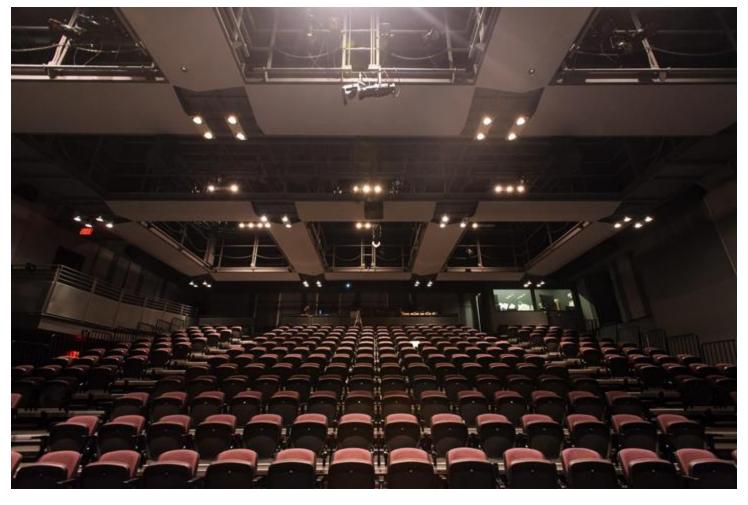
Harbourfront Centre Theatre



Elgin and Winter Garden Theatre Centre



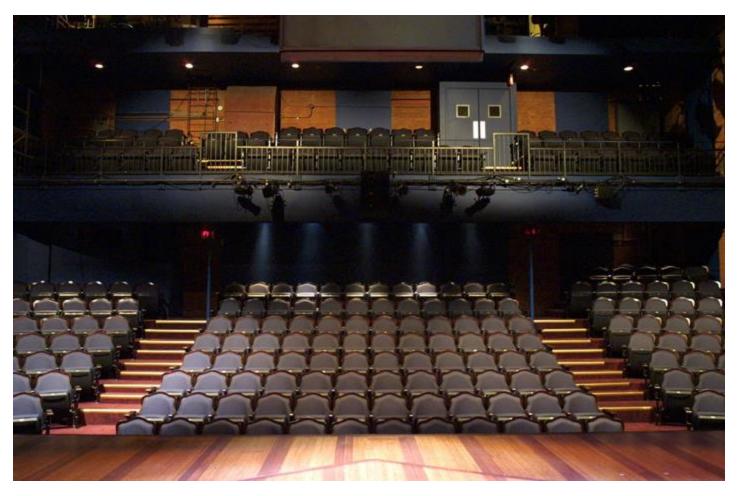
Elgin Hubert Theatre



Daniels Spectrum - Artscape



Coal Mine Theatre



Canadian Stage Berkeley



Hart House Theatre



Soulpepper Theatre



Crow's Theatre



Crow's Guloien



Buddies in Bad Times Theatre









"Theatre, dance and opera entertainment are important elements of a vibrant Toronto and a key driver of business for the city's restaurants. They attract both local and out of town visitors benefiting the various foodservice establishments before and after the performances."

Tony Elenis, President & CEO, Ontario
 Restaurant Hotel and Motel Association

- 95% of Torontonians agree that arts activities help enrich the quality of our lives.
- 91% of Torontonians agree that an active local arts scene helps make a community a better place to live.
- 90% of Torontonians agree that if their community lost its arts activities, people living there would lose something of value
- 92% of Ontarians agree that exposure to arts and culture is important to individual well-being.



1. A committed and detailed plan to reopen



2. Meaningful consultation



3. Continued financial support



Sharron Matthews, High Park



Thank You!

Presentation by Toronto Alliance for the Performing Arts (TAPA)

City of Toronto Mayor's 2nd Annual Summit

Ontario's Restaurant Sector

- Over \$38 Billion in Annual Sales
- Over 360, 000 jobs including youth and seniors
- Supports a huge supply chain
- Offering vibrancy and experiences for locals and visitors
- 97%+ of all revenue go back to the economy



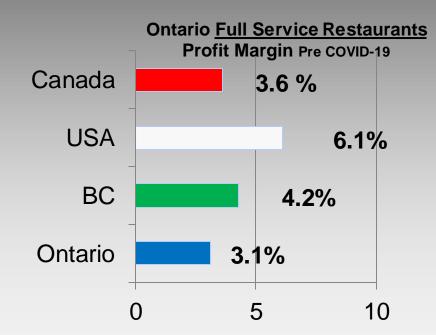
ONTARIO'S RESTAURANTS – A DEPRESSED FINANCIAL PERFORMANCE

COVID -19 Impact

Ontario Restaurants Sales Declines COVID-19

	Year End Dec 2020	Year to Date March 2021
Full Service	-40 %	-40%
Limited Service	-14%	-6%
Drinking Places	-57%	-68%
Total	-30%	-25%

Statistics Canada



ONTARIO'S RESTAURANTS - A DEPRESSED FINANCIAL PERFORMANCE

- 15% of Ontario's Restaurants are closed.
- 8 out of 10 Restaurants are operating at a loss.
- Majority opened can not take any more debt.
- Expecting a two year recovery period –many will require more.





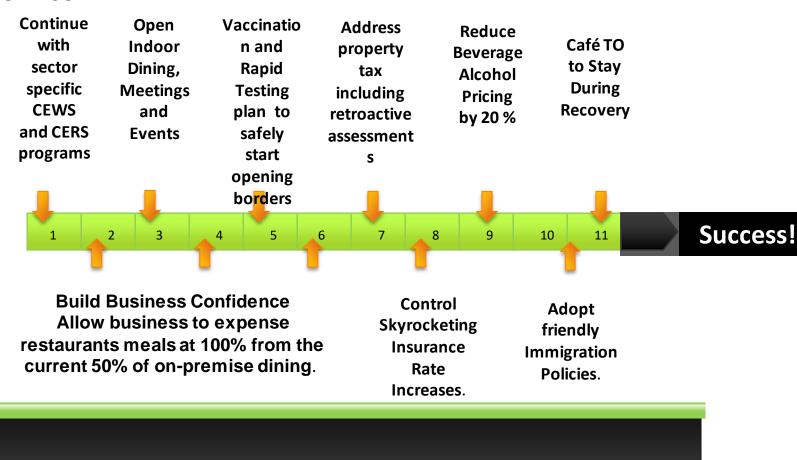
CITY OF TORONTO - RESTAURANT IMPEDIMENTS

COVID -19 Impact

- Restaurants in area locked down longer than other
- Pregions Regions Average Average
- \$40K CEWS not benefiting most due to
- closures.
 Only 15% benefited from CAFÉ TO and Expansion of
- Patios Lowest profit due to highest lease costs in
- Canada Hospitality Employees moving out of the Toronto.



THE ROAD TO RECOVERY





Tim Reardon

Chair, Board of Directors- GTHA General Manager, Sheraton Centre Toronto

Edwin Frizzell

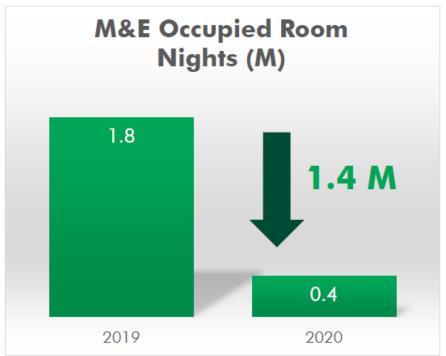
Past Chair, Board of Directors- GTHA Regional Vice-President, Accor ~ Central Canada & General Manager Fairmont Royal York

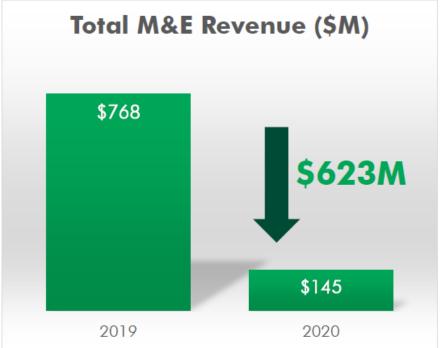
Terry Mundell

President & CEO- GTHA

GTHA HOTEL MEETING & EVENT LOSS IN 2020





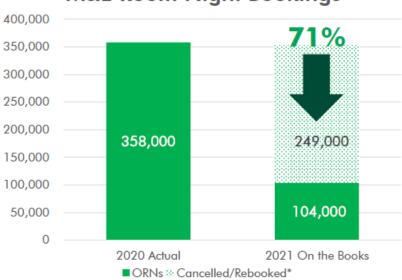


GTHA HOTEL MEETING & EVENT YTD 2021 FORECAST





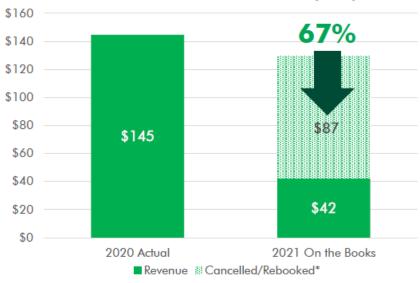
M&E Room Night Bookings



^{*}On the books as of 1/1/21, Cancelled/Rebooked as of 3/31/21

353,000 M&E Room Nights on the books at Jan 1, 2021 – equivalent to 2020 ORNs – of which 71% have cancelled (as of March 31).

M&E Revenue Forecast (\$M)



^{*}On the books as of 1/1/21, Cancelled/Rebooked as of 3/31/21

Of the \$129 M in forecasted M&E Revenue at the beginning of January 2021, 67% (\$87 M) has been cancelled as of March 31, 2021.



GTHA ASKS

Hotels require a reopening plan for our meeting and event space that include and provide clarity on:

- A time frame for reopening
- Percentage based capacity for meeting and event space
- Other restrictions that may be applied
- There must also be a direct path to full opening for hotels.



SERVING THE HOTEL INDUSTRY SINCE 1925

COMPETITIVE SET COMPARISON OPEN FOR BUSINESS

UNITED STATES	CANADA
Atlanta, GA Austin, TX Boston, MA Chicago, IL Denver, CO Houston, TX Los Angeles, CA Miami, FL Nashville, TN New York, NY Philadelphia, PA San Francisco, CA Washington, DC	Calgary Edmonton Vancouver Montreal



Key Messages from Live Music

Mayor Tory's Summit on the Recovery Challenges facing the Entertainment and Hospitality Sectors

Jesse Kumagai

President & CEO, The Corporation of Massey Hall & Roy Thomson Hall Board Chair, Canadian Live Music Association

Erin Benjamin

President & CEO, Canadian Live Music Association



IMPACT OF COVID-19 ON THE LIVE MUSIC INDUSTRY

LIVE MUSIC BY THE NUMBERS

PRE-COVID IN CANADA

- Est. \$3 Billion in GDP
- **72,000** jobs nationwide
- Additional spillover economic benefit to restaurants, bars, hotels, airlines, and tourism industries

SINCE MARCH 2020, THE LIVE MUSIC INDUSTRY HAS REPORTED

- First hit, last back
- 92% average revenue loss
- 114,400 arts, entertainment, and recreation workers lost their job Source: Stats Can Labour Force Survey, employment by industry, Canada. Calculations by CAPACOA
- 85% of professional musicians agree that if they can't perform live, they will have a difficult time making a living Source: Crowded Out study commissioned by Music Canada
- 70% of respondents to a May 2021 survey say they will cease operations permanently without the extension of Federal Relief programs such as CEWS and CERS

#ForTheLoveOfLIVE #PourLAmourDeLaSCENE



IMPACTING TORONTO'S ECONOMY

UPWARDS OF 24 PRIMARY TORONTO VENUES NOW CLOSED PERMANENTLY (UP FROM 11 IN FALL 2020)

Losses per permanent venue closure

Assuming the 11 closures to date are representative of the type of venues that are likely to go out of business due to the ongoing effects of COVID-19 shutdowns, each venue closure would contribute the following permanent annual economic losses in Ontario.



5 FTEs (direct)

10 FTEs (total)



\$242k in GDP (direct)

\$575k in GDP (total)



\$148k in tax

revenue

(federal and provincial total)

In addition, every permanent venue closure due to COVID-19 will significantly reduce the number of performance opportunities available to Toronto musicians. For many, this will affect their ability to earn a living from music.



212

shows per year



2.1 acts per show

average



acts per year



Cumulative economic loss from music tourism shutdown

From March 15 to August 31, 2020, travel bans have put a stop to music tourism, impacting the following:



\$369M in GPP



4,220

ull-time equivalents

The economic losses from the estimated 554,000 lost tourists due to COVID-19 shutdowns amounts to \$369 million in GPP and 4,220 FTEs in Ontario.

KEYRECOMMENDATIONS

"Business is not as usual.
We will not see a return of
customers in the core for the
rest of 2021. These things
take time. Government
support is essential for
this rebuilding period."

- Venue owner

1. EXTENSION OF CEWS AND CERS, DCH RELIEF

- Create a new program for Hardest Hit businesses and individuals to help retain jobs and keep companies operational until they can fully reopen or:
 - Extend CEWS and CERS programs through to December 2021, at 75% for hardest hit companies and organizations who will not return to normal business operations.
- Additional emergency relief to help sustain operations until full reopening, to help manage debt-load and to fully recover. **Canadian Heritage emergency relief** announced in the Federal budget **needs to flow as soon as possible**, and reach as many as possible.

70% of respondents to a June 2021 CLMA survey say they will NOT be able to stay in business without sustained access to government relief through to the end of 2021.

URGENT NEED TODAY

"Unless we can fully reopen maintaining operations is unsustainable. We are not alone... hundreds of companies who hire thousands of people just like us will vanish without continued help. Ongoing federal relief will determine if we live or die. We aren't just "hard hit". We are "hardest hit"." - Venue owner

2. FULL REOPENING:

STEP 4, SECTOR CONSULTATION

Live music has struggled under the weight of unbalanced public health restrictions applied to live performing arts broadly. Allowing a return to **full capacity** indoors (70 to 80% of adults vaccinated with one dose and 25% vaccinated with two doses) come Fall 2021 will be essential (barring any significant 4th wave or additional variants, etc.).

We echo the **TMAC motion**, passed on June 8th that: the Province of Ontario consult with relevant music industry stakeholders on an evidence-based safe re-opening plan for live music venues with particular attention to: capacity limits; distancing measures; workplace safety measures; potential for pivoting venue classification between Bar/Restaurant and Performing Arts; financial supports for industry; and a plan for communicating updates with venue industry and stakeholders.

3. OMIF & RECONNECT: RECOVERY AND GROWTH

Increase and maintain funding to both **Ontario Music Investment Fund** and **ReConnect** to stimulate economic impact and job creation.

Provide multi-year commitments to stakeholders (including venues) so that long-term planning for recovery can begin with confidence. OMIF, the only funding available to the commercial live music sector, will be even more important moving forward.

URGENT NEED TOMORROW

"WITHOUT any further support our doors will be closed in months. We have borrowed debt to survive the last 15 months with zero revenue from live events. We cannot sustain another 12 months until live returns to normal levels pre covid."

5. ACCESS: TESTING

As policy evolves regarding vaccinated and unvaccinated patrons, artists and crew involved in/attending live performance, government should provide access to free testing to all businesses.

6. INSURANCE: CRISIS INSIDE THE CRISIS

Obtaining affordable coverage remains impossible for many in the live music sector, despite more than a year of hard work to resolve issues. Government can play a key role in helping to encourage the insurance industry to provide **fairly priced, accessible** liability insurance. We ask the Government to **convene a meeting with all parties as soon as possible** (insurance industry, venues and relevant gov't ministries) to address.

7. ONGOING: DEBT FORGIVENESS

Struggling to stay operational at this time, the live music community has rapidly accrued **punishing debt**, with many also depleting personal savings, having exhausted all other options. The financial burden of the past year will be felt well beyond the return to normal for the businesses that survive. Addressing debt forgiveness will be critical.



Erin Benjamin

President & CEO Canadian Live Music Association ebenjamin@canadianlivemusic.ca

Jesse Kumagai

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Corporation of Massey Hall & Roy Thomson
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#FORTHELOVEOF LIVE

#POURL'AMOURDE LA SCÈNE

