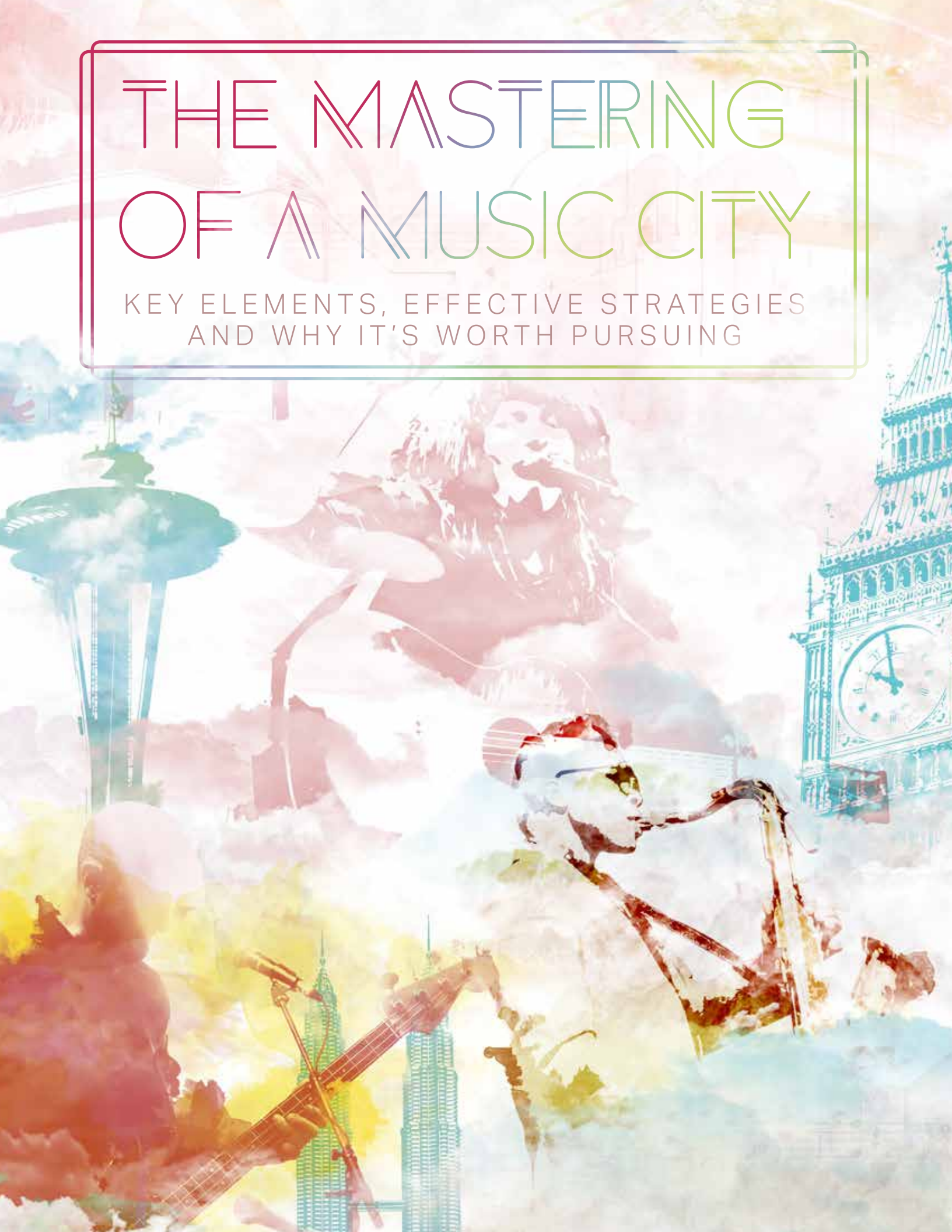


THE MASTERING OF A MUSIC CITY

KEY ELEMENTS, EFFECTIVE STRATEGIES
AND WHY IT'S WORTH PURSUING



Presented by:



In association with:





Air Canada Centre, Toronto, Billy Talent, Photo Credit: Dustin Rabin



Fun Fun Fun Fest, Austin, Texas, Photo Credit: Jackie Lee Young



We are delighted to present this report to you, our colleagues in music, government and business worldwide, on behalf of IFPI and Music Canada.

A Music City, by its simplest definition, is a place with a vibrant music economy. There is growing recognition among governments and other stakeholders that Music Cities can deliver significant economic, employment, cultural and social benefits.

While music takes centre stage in this study, the findings and recommendations are relevant to almost anyone in the broader community. Are you looking to draw tourists to your city? Attract tech firms and the bright, young people they employ? Build your city's brand? Think music!

This report is intended as a "roadmap" to help you tap into the power of music. It applies to communities of all sizes, no matter how far along the path they are to realizing their full potential as a Music City.

The findings draw upon an exhaustive review of existing information and research, more than 40 interviews with a wide array of experts in music and government on all continents, and two international focus groups.

We are grateful to the many people who gave willingly of their time and ideas in the research for this report.

It is our hope that this report inspires you to build a Music City in your community or to make your Music City stronger than ever. We are confident that the information and recommendations in this report will help you get there.

Yours in Music,

Handwritten signature of Frances Moore in white ink.

Frances Moore
Chief Executive Officer, IFPI

Handwritten signature of Graham Henderson in white ink.

Graham Henderson
President & CEO, Music Canada

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SECTION I
INTRODUCTION

This report is intended as a universal “roadmap” to create and develop Music Cities anywhere in the world. The strategies and recommendations outlined here are designed to be flexible in recognition of local variations in music, culture, economies and political structures. They can be applied equally to well-established Music Cities seeking to further enhance their music economies and to nascent, aspiring Music Cities. They are relevant to communities both large and small.

The term “Music City” is becoming widely used in cultural communities and has penetrated the political vernacular in many cities around the world. Once identified solely with Tennessee’s storied capital of songwriting and music business, Nashville, Music City now also describes communities of various sizes that have a vibrant music economy which they actively promote. Alliances are being formed among cities that see value in partnering to enhance their music success, Music City accreditations are being discussed and defined, and Music City panels are popping up at conferences around the globe. Outside the cultural community, there is growing recognition among governments and other stakeholders that Music Cities can deliver significant economic and employment benefits beyond the long-acknowledged cultural and social benefits. Quite suddenly there is a lot of interest in becoming a Music City, and how to make one succeed.

Following the 2012 publication of a report by Music Canada, “Accelerating Toronto’s Music Industry Growth: Leveraging Best Practices from Austin, Texas,”¹ leaders in other cities began asking for their own “roadmap” so that they too could tap into the power of music. The curiosity spread to IFPI, Music Canada’s international counterpart, and to diverse communities such as Kuala Lumpur, Malaysia and

Tempere, Finland. There was clearly a desire for effective Music City strategies and best practices that could be applied to any community, anywhere in the world.

What follows is a report written principally for music community experts as well as political leaders and government officials. While it is envisioned as a source of inspiration and information for almost anyone interested in building a stronger, more vibrant community, the findings will be of most practical use to: (i) professionals in the music industry including venue owners, concert promoters, music festival organizers, music managers and agents, record label executives, artists and music industry associations; (ii) politicians at the local level, but also at the regional and national levels; (iii) government officials involved in economic and/or cultural development at the local level, but also at the regional and national levels; and (iv) tourism and business leaders looking for ways to enhance local economies.

How each city defines success will vary. Some cities have set very ambitious goals for the delivery of economic, cultural and other benefits. For others, it comes down to creating a sustainable environment for music creation, for the sake of music, pure and simple. “One of the things that would be a really good measure,” says David Grice, Managing Director of Musitec, a music, technology and creative industry cluster in Adelaide, South Australia, “is listening to a child telling their mom and dad that they want to be in the music industry and parents not saying, ‘you need to get a real job.’ That would be a great sign of success.”

In a similar spirit, this report does not attempt to establish a benchmark for Music Cities or otherwise codify success. Rather, it provides a comprehensive framework of best practices to help you achieve your Music City goals, however you may define them. The

best practices are outlined in detail in section V along with specific, practical recommendations that can be put to use by readers.

This report has been prepared principally with the commercial music sector in mind. While many of the cities researched for the report have strong traditions of classical, choral and other non-commercial music that deliver great benefits, we have not investigated those segments in depth. However, many of the strategies recommended will also benefit these segments of the music community.

METHODOLOGY

Much has been written about individual Music Cities, providing a great deal of thoughtful material for the research team's initial global scan. This preliminary research helped us develop a larger list of cities to investigate beyond "the usual suspects." We sought to include both well known Music Cities as well as cities that are aspiring to advance their music economies. It was also vital to present a diversity of locations spanning the globe.

To obtain first hand accounts from these cities, we conducted more than 40 in-depth, one-on-one interviews with music association leaders, music entrepreneurs including publishers, promoters and artists, municipal employees from music offices and cultural departments, tourism promotion experts and investment and economic development specialists. Each individual responded to wide-ranging questions about the key challenges and opportunities in their cities. This provided a framework for the third phase of our research – two international focus group sessions. The focus groups were led by Erik Lockhart of the Queen's Executive Decision Centre at Queen's University in Kingston, Canada. Participants joined both by phone and online. The focus groups helped verify and expand upon the initial findings and identify the most important Music City

elements, benefits and strategies.

We are grateful to the many people who gave willingly of their time and ideas in the research for this report. The enthusiasm of the focus group participants, in particular, suggests that there is a great deal of interest in further exchanges of ideas and best practices among Music Cities around the world.



SECTION II
EXECUTIVE SUMMARY

There is nothing like music as a means to connect people, bridge linguistic and cultural divides and provide an avenue for identity and expression. Music is a transformative experience.

Collectively, the music ecosystem generates rich social, cultural and economic benefits.

Cities are increasingly assigning importance to these advantages and working with their music communities to accelerate the growth of the music economy, and identify and eliminate barriers. Small or large, they have the potential to become Music Cities.

This report identifies the essential elements of Music Cities, details the benefits they generate, and describes the most effective strategies Music Cities employ to enhance their music economies. It provides a "roadmap" for music community leaders, as well as officials and elected office holders to develop a comprehensive music strategy for their municipality. These recommendations can be scaled to communities of any size; however, for the purpose of this report we will use the term "Music City."

MUSIC CITY KEY ELEMENTS

The essential elements of Music Cities are:

- Artists and musicians;
- A thriving music scene;
- Access to spaces and places;
- A receptive and engaged audience; and
- Record labels and other music-related businesses.

It is also important to have multi-level government

support for music, a broader city infrastructure conducive to the sector, and music education programs. Many other beneficial elements were identified in the research for this report including music history and identity. However, the above-noted components received a higher ranking by the focus groups conducted for this study.

MUSIC CITY BENEFITS

A vibrant music economy drives value for cities in several important ways: job creation, economic growth, tourism development, city brand building and artistic growth. A strong music community has also been proven to attract other industrial investment, along with talented young workers who put a high value on quality of life, no matter their profession.

MUSIC CITY STRATEGIES

The strategies offered in this report are based on research gathered from dozens of cities around the world. The following strategies are the ones most often cited as an effective means to grow and strengthen the music economy.

Key Strategies:

1. Music-friendly and musician-friendly policies

Government policies have a direct impact on the ability of music businesses such as live performance venues, recording studios and rehearsal spaces to operate sustainably. Business licensing, liquor licensing, transportation planning and parking, as well as land-use planning all have an impact on the health of the music economy. Compliance requirements

should be appropriate without becoming a barrier to doing business. Many communities face challenging decisions regarding land-use planning as a result of gentrification and urban growth. In some cities, historically significant music properties are threatened or have already been lost. Solutions to these challenges include heritage designations, cultural zones and policies based on the “agent of change” principle.

Similarly, musicians, singers, songwriters and producers can be helped or hindered by the government policy environment. Successful Music Cities create a supportive environment for artists so that they can focus on doing what they do best: making music. Support can be in the form of training and education programs, mentoring, access to hubs or incubators and affordable housing.

2. A Music Office or Officer

Navigating the broad range of government policies and regulations that impact music can pose significant challenges for music communities. Cities that have established a single point of contact for the music community, in the form of a music office or officer, are better positioned to build their music economy and develop effective policies. Music offices typically lead city music strategy development and mediate conflicts that arise between music businesses and the larger community. Music officers most often have prior experience in music or another creative sector that gives them invaluable sector knowledge.

3. A Music Advisory Board

Music Advisory Boards or Commissions provide an invaluable link between the music community and City Hall. Advisory Boards are typically composed of representatives from a broad cross-section of the music community, but also often include professionals engaged in related industries such as tourism and

economic development. They are also an ideal forum for the music community to develop internal consensus on issues, and provide advice on the legislative and regulatory environment.

4. Engaging the broader music community to get their buy-in and support

The involvement of the people most affected by music strategies is critical to the success of a Music City. Collaboration across the different segments of the music community doesn't always come naturally as the sector is composed primarily of small and medium-sized businesses. Many operators of these businesses wear various hats, work only part-time in music, and struggle just to make a living. However, evidence shows that cooperation and collaboration across the sector can lead to significant improvements to the regulatory and business environments, and are also the most effective means of gaining support from political leaders.

5. Access to spaces and places

Music needs a home; in fact, it needs many homes. From education to rehearsal to recording to performance, Music Cities require a variety of quality spaces and places to succeed. To meet this need, the first step is to take inventory so that gaps can be identified. For live performances, a full range of venues is essential to support artists as they advance through their careers – everything from small basement venues to stadiums and all points in between. Frequently, venues and other music businesses cluster together, enhancing their success. Hubs and accelerators are also proving to be very effective in different cities around the globe.

6. Audience development

Demographics play an important role in audience development; in particular, large student populations

are identified as an advantage in many Music Cities. All-ages events can help engage younger audiences, thereby encouraging youth to develop a lifelong relationship with music. Factors like a community's proximity to other music markets, transportation links and promotion of live music events influence audience development. A common challenge is building an audience for local performers, who often fall under the shadow of high profile global stars.

7. Music tourism

Music tourism benefits cities to the tune of billions of dollars each year. Tourism assets include a city's year-round live music scene, music festivals and historical music landmarks. A few cities have developed comprehensive music tourism strategies that involve music-based branding, promotional campaigns, wayfinding apps and other social media strategies, investment in music infrastructure and signage, and programming. Accurate measurement of music tourism is a common gap since it is normally grouped with cultural tourism.



SECTION III
KEY ELEMENTS
OF A MUSIC CITY:
THE FULL SCORE

WHAT MAKES A MUSIC CITY?

“The combination of having an active, thriving music scene with artists, bands, venues, education, etc. and support from the public, media, government and business.”

– Michael Blair, The House of Songs and Scorpio Music Production, Stockholm

“Each city and town is different. A successful Music City contributes strongly to the grassroots music scene, and generates value to the local economy and community as a whole.”

– Tom Kiehl, UK Music, London

There is no strict definition of a Music City. Nevertheless, the most successful Music Cities have certain elements in common. Participants in two focus groups conducted for this study identified the following five elements as the most **essential** components of a true Music City:

- Artists and musicians;
- A thriving music scene;
- Access to spaces and places;
- A receptive and engaged audience; and
- Record labels and other music-related businesses.

Focus group participants identified three other elements as **important**:

- Multi-level government support for music;
- Broader city infrastructure; and
- Music education.

They also named elements that are often found in Music Cities, including:

- Music history and identity;
- Music tourism;
- Recognition of music as an economic driver;
- Strong community radio supporting local independent music; and
- A distinct local sound or sounds.

The principal elements are explored below.

Virtually every city, no matter how thriving its music community, has areas of strength and weakness. Austin, Texas, the “Live Music Capital of the World,” has virtually no representation from major music labels. London, UK is a hotbed of live music, but has failed to prevent the loss of iconic venues. Kuala Lumpur, Malaysia and Johannesburg, South Africa can fill stadiums for international superstars, yet struggle to draw smaller audiences to see local artists.

What is most important is to accumulate a critical mass of essential and important elements, and to continually advance them. Current and aspiring Music Cities leverage their music strengths and pursue opportunities to develop others.

THE ESSENTIAL ELEMENTS

Artists and Musicians

It might seem obvious, but a Music City needs people who make music. Musicians, singers, songwriters and producers are a necessary foundation. Many cities report that artists congregate “organically.” In other words, a strong gathering of artists cannot be manufactured, though implementing “musician-friendly” policies, as outlined in section V.1, is important to attracting and retaining them.

A Thriving Music Scene

“Austin assumed the self-proclaimed title of Live Music Capital of The World in 1991. Live music is available for consumption at any time, any day of the week. From the airport, to grocery stores, to City Council meetings, music

is embraced in Austin on an unparalleled level. An astonishing 250 or so places present live music here, and every style is represented.”

– Don Pitts, Music Program Manager, City of Austin

A Music City is invariably built on a thriving live music scene. This means more than just having a large number of live performances. It means having a diversity of music offerings, as well as support for local and indigenous cultural expression, in addition to support for larger touring acts. Ideally, there is a balance between local artistic expression and international content.

Spaces and Places

Spaces and places for live music performance and other activities such as rehearsing, recording and music education are integral to the success of a Music City. The range of music venues should span informal to formal, indoor to outdoor, and all sizes in order to meet the needs of artists at every point of their career. Quality is important, though, as Mark Davyd, CEO of Music Venue Trust in the UK points out: “If a 16 year old goes into a venue with terrible sound and lighting, does it motivate them to make it a career? Not likely.”

A Receptive and Engaged Audience

“Music fans here are assertive, informed, dedicated, passionate about music, and support artists in a big way. We have an informed, dedicated, passionate media, and a city that recognizes the importance of these things.”

– Mike Tanner, Music Sector Development Officer, City of Toronto

An informed and passionate audience is critical for a successful Music City. Ideally, audience support

extends to local musicians as well as touring artists, and fans are willing to pay for performances by artists at all levels in their careers, and representing a diverse range of influences. Attention should be paid to growing an audience of younger music fans.

Music-Related Businesses

"The music industry starts with the artist but is not only about the artist. An infrastructure and network of people grows around an artist and furthers their career... A robust industry creates employment in all areas of music from its creation, to performance, to distribution and promotion."

– Martin Elbourne, UK music promoter

A critical mass of music-related businesses and professionals is essential to the success of a Music City, but it is not uncommon to have gaps within this category and still succeed overall. Nashville proudly describes itself as a "self-sustaining music centre" where it "is entirely possible to write, produce, record, release and promote an album without looking outside the Nashville region."² In contrast, other cities have identified gaps in their inventory that they are working to address.

OTHER IMPORTANT ELEMENTS

Multi-Level Government Support for Music

The most successful Music Cities benefit from cooperative efforts by all levels of government, with engaged and supportive political representatives. The best example of this is in Australia, where coordinated action at the federal, state and local levels supports and grows the music industry. The State of New South Wales, for example, eliminated the

special licence needed by venues to host live music in 2009³. This significantly reduced red tape, which laid the foundation for the development of four local council music action plans including the most recent which was endorsed by Wollongong City Council⁴. The National Live Music Office, established in 2013, supports the development of local government policies pertaining to live music, live venues and audience development at the local level as well as advocating for additional improvements at the state level.

Political support is particularly important. The strategies described in Chapter V, without exception, require a commitment from elected representatives to allocate the needed financial or human resources or enact the required policy and regulatory changes. Communicating the extensive benefits listed in Chapter IV will help to convince politicians of the value of these initiatives.

Broader City Infrastructure

Many of the cities cited in this report have explicitly recognized the importance of city infrastructure. A baseline level of transportation infrastructure, including public transit and parking near venues, is necessary to connect audiences with artists and venues, and thereby facilitate the growth of music scenes. Affordable housing is necessary to attract and retain artists, many of whom earn limited incomes.

Music Education

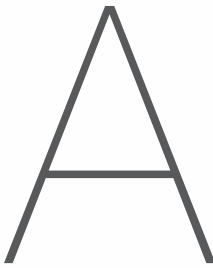
Music education is present in successful Music Cities. Generally, it is understood to include formal music training in the education system, as well as specialized programs at colleges and universities. Not only do these programs help develop future musicians, but they develop appreciation for music

at a young age, seeding future audiences. The many other benefits of learning and playing music are well documented and wide-ranging. These include enhancing children's neural activity, language development, test scores, IQ and learning abilities.⁵

It is interesting to note that local music history and identity did not receive as high a ranking as might have been expected from the focus groups convened for this report. This is despite the fact that many Music Cities are steeped in music history. Liverpool, New Orleans, Memphis, Nashville and London spring to mind. For cities like this, music history is leveraged for economic and cultural gains. It is an asset that warrants protecting, celebrating and building upon. As Graham Henderson, President of Music Canada, notes, "A great Music City knows its music history – you need to know your own story."



SECTION IV
MUSIC CITIES:
A HIT PARADE
OF BENEFITS



thriving music scene generates a wide array of benefits for cities, from economic impacts to cultural development. Key benefits include:

- Economic impact;
- Music tourism;
- City brand building;
- Cultural development and artistic growth;
- Attracting and retaining talent and investment outside of the music industry;
- Strengthening the social fabric; and
- Validating music as a respected and legitimate industry.

These benefits are highlighted below.

Economic Impact

Music can be a significant driver of economic activity, employment, exports and tax revenue. These impacts derive mainly from direct spending on the production of live music and ticket purchases by local residents and tourists, as well as music-related spending on such things as food, drink, accommodation and transport. Significant economic activity is also created in recorded music, publishing, music management and other related activities. Beyond these, music generates indirect economic benefits through spending in such areas as promotion and graphic arts.

A study by the music industry organization UK Music measured the contribution of music to the British economy at £3.8bn in 2013, with a full £2.2bn attributed to music exports. The organization's "Measuring Music" report pegs the number of people working in the industry at 111,000, of which

almost 68,000 are musicians, composers, songwriters and lyricists.⁶

The impacts of Nashville's music cluster were thoroughly examined in the 2013 "Nashville Music Industry" report, which found that the music industry helps to create and sustain more than 56,000 jobs within the Nashville area, supports more than US\$3.2bn of annual labour income, and contributes US \$5.5bn to the local economy for a total output of US\$9.7bn.⁷

In Melbourne, Australia, a 2012 census found that live music alone generated more than A\$1bn in spending at small venues, concerts and festivals, supported 116,000 annual full-time equivalent jobs, and produced significant spin-off benefits to restaurants, hotels, transportation companies and other providers.⁸ In 2009-2010, an estimated 5.4mn people attended live music performances in the city. This puts music in the top ranks of the city's economic drivers.

Music Tourism

For cities looking to generate economic benefits from live music, tourist spending is a key part of the equation. Not only does tourist spending represent "new" money to a city, but it also generates additional spending beyond music. When tourists travel to experience live music, whether a concert, music festival or a favourite band in a basement venue, they will spend significantly more on hotels, restaurant meals, bars and other local attractions.

As Lutz Leichsenring of Clubcommission Berlin e.V. notes, "Tourists aren't coming (to Berlin) because there are hotels and hostels, but because there is content."

The economic impact of music tourism is well

documented in Austin, Texas. Music tourism accounted for almost half of the US\$1.6bn of economic output and US\$38bn in tax revenue attributed to music there in 2010.⁹ SXSW, the city's iconic annual music festival, is a magnet for tourists and music industry professionals from all over the world. A study commissioned by the festival found that its economic impact in 2014 was an impressive US\$315mn.¹⁰

As reported by Texas Monthly, "To put it in perspective, SXSW Interactive director Hugh Forrest told the Austin Business Journal that the figure is roughly 65 per cent of the impact that a city like New Orleans sees from hosting the Super Bowl. It's nearly a third of the net impact that the 2012 Olympics had on London. And, as the report is keen to point out, those events are fleeting: the Super Bowl isn't in New Orleans *every year*, and the Olympics move on pretty quickly, too. SXSW happens in Austin every year, which means that both the economic impact and the cultural cachet that the festival brings to the city are permanent fixtures."¹¹

Austin's music scene draws tourists in other ways as well. The city's successful drive to host Formula 1 racing, which



in itself attracts thousands of tourists, has been attributed directly to its strong music scene.

Music tourism is big business in the UK. According to the UK study "Wish You Were Here: Music Tourism's Contribution to the UK Economy," approximately £2.2bn in direct and indirect spending was generated by 6.5mn music tourists across the UK in 2012, generating the equivalent of 24,251 jobs.¹² The study found that 41 per cent of live music audiences are music tourists, and that overseas music tourists spent an average of £657 while visiting the UK. London, identified as the UK's music tourism capital, attracted one million music tourists during 2012. Manchester and Scotland were also popular with overseas fans: concerts and festivals in those places attracted 45,000 and 26,000 overseas visitors respectively.¹³

Just about everyone knows that The Beatles hail from Liverpool. Unsurprisingly, the Fab Four are the city's number one tourist attraction, contributing more than £70mn to the local economy. Liverpool is the fifth most visited city in the UK. In 2013, tourists spent £3.64bn there, generating 49,000 jobs. Visitors cite The Beatles as one of the main reasons for visiting the city.¹⁴

Nashville, famous as "Music City", in 2014 welcomed approximately 13 million visitors who contributed over US\$5bn in revenue, creating 50,000 jobs.¹⁵ While the contribution of music to that figure is not broken down, attractions like the Grand Ole Opry almost certainly make music the city's main tourist draw. Hundreds of thousands of people visit the iconic venue every year for live performances, backstage tours and as part of music tourism packages.¹⁶ On top of this, over 900K people visited the Country Music Hall of Fame and many more attended other music attractions including the Musicians Hall of Fame and the Johnny Cash Museum.

In Music City, the Nashville Convention & Visitors Corporation puts music at the core of its brand promise (see case study in Tourism Strategy section). According to Butch Spyridon, President and CEO of the Nashville Convention and Visitors Corporation, "Nashville is a city with great musical offerings, a plethora of talent where songs are written and recorded, and an infrastructure of talent liaising with businesses and creatives. Music IS the brand; Music City is the brand name."

Also in Tennessee, Memphis draws more than 10mn visitors per year and tourism spending of US\$3.1bn annually. As the home of music heritage sites such as Beale Street and Graceland, Memphis's rich music history is its biggest tourism draw. Graceland attracts more than 500,000 visitors per year¹⁷ and generates more than US\$32mn in annual revenues from visits, merchandise and branding.¹⁸ Sun Studio, famous as the recording studio of Elvis, Johnny Cash and other iconic artists, attracts 200,000 visitors annually.

Of the approximately 9mn tourists who visited Melbourne, Australia in 2013, nearly 2mn of them were international tourists.¹⁹ International tourist spending was estimated at A\$4.5bn in a city where music is a top attraction.

Major music festivals draw large numbers of tourists to the cities that host them. The numbers are impressive:

- Rock al Parque (Bogotá) - approximately 400,000 attendees in 2014; 87 bands performed.²⁰ "Rock al Parque" is one of the world's largest music festivals in South America, attracting more than 3.8mn attendees since its inauguration in 1995.
- Coachella Valley Music and Arts Festival (Coachella Valley, California) - US\$47mn in

revenue (2012 and 2013); more than 158,000 attendees; US\$254mn estimated economic impact on the surrounding community.

- Lollapalooza (Chicago) – US\$140mn estimated economic impact; approximately 220,000 attendees in 2014.²¹
- Reeperbahn Festival (Hamburg) - 30,000 attendees from approximately 40 countries, including more than 3,500 music and digital industry professionals and media representatives; 600 events, including about 400 concerts and 150 conference events.²² Reeperbahn is Germany's largest club festival.

City Brand Building

Music can play a powerful role in building a city's brand. For a select group of cities with the strongest music scenes or deep music heritage, music is a big part of who they are. Think "Liverpool," and most people think "The Beatles." Think "Memphis," and music icons like Elvis and Johnny Cash come to mind. Austin's familiar tagline is "Live Music Capital of the World." Nashville is, simply, "Music City." Other cities are well known as major music centres, though music may not be at the forefront of their brand identity. London, Melbourne, Montreal, New York, Berlin, Bogotá and Toronto are among these ranks.

Music branding not only helps to draw music tourists, but it adds a "cool" factor to a city that can accelerate other benefits such as attracting and retaining investment and talent. It also forms an important part of a Music City's self-identity. Clubcommission Berlin e.V.'s Lutz Leichsenring remarks, "What makes Berlin cool? Not the shopping malls that every city has. It's the artists."

Austin unveiled its "Live Music Capital of the World" tagline in 1991, and has reaped the benefits ever

since. From the moment one lands at the city's airport, the tagline is front and centre on promotional posters. The airport itself lives up to the brand promise by hosting 20-30 live music shows each week. The city interweaves music into its tourism outreach, and aggressively leverages the brand. Jennifer Houlihan, Executive Director, Austin Music People, remarks that for residents of the city, its music brand "is a big part of how people define Austin and how they define themselves." She adds, "People took it to heart as something they could count on in their community. People here have a personal pride in Austin's music positioning, even those not connected to the industry."

South Korea's upbeat style of pop music, "K-Pop" (known as "Hallyu" in Korean), has developed a global brand identity of its own. The international megahit "Gangnam Style" helped push K-Pop – and along with it, South Korea's brand – further to global prominence. This, in turn, has been credited for strong growth in tourism to South Korea^{23,24} – up 13.4 percent in 2012 from the year before. In an interview with Mail Online Travel, Ramy Salameh, spokesperson for the Korean Tourism Organization in London, said that Gangnam Style and K-Pop had attracted a new audience to the country. "A 10.6 per cent increase in arrivals from the UK to Korea is a clear reflection on the growing popularity of the destination, helped in no small part by PSY's Gangnam Style," he remarked.

Cultural Development and Artistic Growth

Beyond economic considerations, a successful Music City also creates the conditions to support artists in their career development. Access to the various supporting professionals, and the training to improve their craft and knowledge of the business enables more artist entrepreneurs to advance from hobby to career. In addition, more live performance



The Bedford, London, Photo Credit: Shuga Buddha

opportunities, in high quality venues of the appropriate size for the stage of their career, and in front of engaged audiences, help artists hone their skills.

David Melo, Marketing Manager of Invest Bogotá, attributes some of the city's growth in music creation to open-air festivals, which are part of Bogotá's Music City program. These events select artists through an open call for submissions, and pay them to perform. "This has provided performance opportunities and income for emerging artists in six genres, creating an incentive for bands and ensembles to develop."

Katja Lucker, CEO of the Musicboard Berlin GmbH, points out that Music Cities should aim to go beyond creating a receptive local audience. She feels that her organization will have achieved success when more local artists are recognized and appreciated not only at home, but abroad as well.

Global success can in turn benefit the city from which artists hail. But achieving those benefits is a challenge acknowledged in Austin by Music Program Manager Don Pitts. "The lack of market access in the US and abroad limits the international profile of Austin Music," he says. Export development in the music industry is supported by many national governments including in Canada, France, Germany, Australia and the UK. Where export support is absent, as Pitts can attest, both artists and the Music Cities where they are based, suffer. The Toronto-Austin Music City Alliance, a private-public partnership involving City Council, City staff and private industry leaders in both cities, is in large part a response to this challenge. Trade and export are primary motivators for the Alliance.

"There are artists that are currently rising up out of Australia – that's not a bad starting point for our music strategies," says Ian James, Managing Director

of Mushroom Music Publishing. "But the important thing is what they inspire in the next generation."

Attracting and Retaining Talent and Investment Outside of the Music Industry

Music plays a role in attracting and retaining talent and investment in a city's broader economy. Damian Cunningham, Director of Audience and Sector Development in Australia's National Live Music Office, explains: "It is commonly understood that the life that the arts brings to a city causes people to move there and attracts industry. There is an enormous movement by local and state governments in Australia to enhance the vibrancy of their cities in order to hang onto youth, and attract entrepreneurs and businesses."

In Montreal, whose public policies support and which promotes itself as a cultural metropolis and city of festivals, Emmanuelle Hébert, an official with the city's Department of Culture, says investment attraction really boils down to brand perception. Of course, the basic economic factors must be met, but "What is going to make the difference between two cities? Quality of life for your employees. We believe that a thriving cultural scene, including music, is a key factor."

Richard Florida, author of "The Rise of the Creative Class" confirms that a thriving music scene attracts talented young people to cities.²⁵ This applies not only to work in music, but also to tech and many other fields as well. The world's top talent is highly mobile today. For many cities, putting their best foot forward to attract well-educated and talented young people is a major challenge in an environment of intense global competition. Music can be a big part of recruitment success.

This is not lost on the industrial companies based in Gothenburg, Sweden, according to Fredrik Sandsten, Event Manager Music at the public tourism agency. "We have a very industrial city with huge industrial companies," he says. "They want culture and music to flourish because they see the link to attracting young workers to their companies."

A study of Nashville's music cluster identified a cross-pollination with other parts of the economy, be it healthcare or media, that rely heavily on information technology workers. The study notes: "The attractiveness of Nashville as a city and region is predicated on its superior quality of life, affordability, and, very significantly, its truly unique culture and creativity that are known far and wide. Building the base of creative talent needed across industries becomes a much easier proposition where a leading business sector like Nashville's music industry is virtually synonymous with creativity."²⁶

A successful Music City can fuel other creative industries in other ways as well. For example, skills developed in many music industry roles, such as sound engineers, video producers and graphic designers, can be applied to other sectors.

Andrea Goetzke, a cultural producer based in Berlin, describes the intermingling of music and technology businesses in the city. "That really happened organically," Goetzke says, beginning when two large Berlin tech companies grew out of the music scene. In fact, their CEOs were part of the music scene before moving to tech. Many others have followed in their footsteps. Goetzke says it is estimated there are now more than 800 people working in music tech in Berlin.

Strengthening the Social Fabric

Coincident with cultural benefits, vibrant music scenes offer social benefits. Music builds bridges

between cultures and languages, connecting people within a city, a region and across borders. David Grice, Managing Director of South Australia's Musitec, an organization that works to foster the state's music industry, describes the cultural power of Music Cities: "Music is an industry like no other because of the way it touches human beings. It's an industry that engages people, that builds cultural expression and community, and adds so much energy to a city."

This can be especially impactful in places where the social fabric is frayed due to income disparity and other factors.

Andre Le Roux, Managing Director of the SAMRO Foundation in Johannesburg, South Africa, seeks to develop a stronger music scene there in large part to bring people together under a unified cultural banner: rich and poor, black and white, and across linguistic, regional and national divides. South Africa has one of the biggest income gaps in the world, with high levels of crime and unemployment – a situation exacerbated by the lingering effects of apartheid. Youth unemployment in South Africa was reported at over 50 per cent in 2013, according to the World Bank. "If you get more people performing music and playing instruments, you may get fewer

"Contemporary music is the way we express ourselves and who we are. It's where young people gather, share ideas, and spend time together."

Patrick Donovan, Music Victoria, Melbourne



Carrington Heights Primary School in Glenmore, Kwa-Zulu Natal, Photo Credit: Vulane Mthembu

people feeling angry, disillusioned and disenfranchised,” Le Roux remarks.

This is a prime inspiration for Concerts SA, an initiative led by Le Roux’s SAMRO Foundation in partnership with the Norwegian Ministry of Foreign Affairs.

In Venezuela, where more than 7 percent of the country’s 30 million inhabitants live in extreme poverty, the El Sistema program teaches impoverished young people between ages three and 29 the principles of rhythm, singing, playing musical instruments and performing. The program is part of a United Nations Development Programme (UNDP)-backed project that has given poor children in Venezuela the opportunity to arm themselves with instruments rather than guns.²⁷ About 500,000 students participate in the program, which aims to double that number.²⁸

In Bogotá, Colombia, one of the main social programs for children and youth is a music education program offered by the Fundación Nacional Batuta. The initiative uses symphonic orchestral practice to enhance both musical and social development.

Batuta’s philosophy is based on the transformative power of music, its formative and socializing value, its contribution to welfare and to improving quality of life. In half of Batuta’s 30 centres in Bogotá, 85 percent of the youth participants belong to the most vulnerable social class.²⁹

The power of music to strengthen the social fabric is recognized in developed countries as well. Stuba Nikula, Director of the City of Helsinki Cultural Office, notes, “Arts and culture has been seen as a tool for tourism and city branding. But more and more it is seen as a tool to make a better society in general. A lot of art projects here focus on suburbs that aren’t doing so well.”

Validating Music as a Respected and Legitimate Industry

A widespread challenge for the music industry is to convince policymakers, politicians and other industries of the wider economic benefits of music, limiting the industry’s ability to gain a seat at the decision-making table, and to garner financial and policy support.

Occasionally, a single high profile music event can provide a convincing demonstration of music's benefits. Hamburg, Germany's Reeperbahn Festival draws thousands of music-loving tourists from all over Germany and abroad along with many international music business professionals, artists and creative industry professionals. Alexander Schulz, the festival's General Manager, remarks that this success has "dramatically" changed public and politicians' views on clubs, the music scene and the music industry. "That has helped a lot in generating support for funding, cultural promotion, marketing support, (more favourable) event regulations and more," he says.

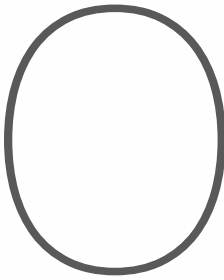
More commonly, however, individual music businesses, which are typically small in size, lack the influence of companies employing thousands of people. Furthermore, any arts industry, especially one with a youth orientation, can be viewed in a different paradigm to those such as automobile manufacturing or real estate development. Yet in advanced Music Cities, estimated aggregate revenue and employment in the music industry can be significant.

Bobby Garza, General Manager of Austin's Transmission Events, describes the challenge as follows: "Our opportunity is to develop a sector of the economy that is more sustainable in economic downturns, that enriches the city's quality of life. The challenge is how to articulate that to civic leaders who are worried about picking up the trash." When music stakeholders work together under a unified Music City umbrella, they gain greater legitimacy – and the ears of powerbrokers in business and all levels of government.

Austin, Melbourne, Nashville, South Australia, and more recently Toronto, are witnesses to this phenomenon. In all of those places, music stakeholders have gained a seat at government departments focused on industry or economic development, as well as cultural affairs. This gives music a bigger voice with an arm of government that has greater policymaking and funding clout.



SECTION V
EFFECTIVE MUSIC
CITY STRATEGIES:
STRIKING THE RIGHT
CHORDS



ne has only to look at some of the most successful Music Cities in the world to realize that they have many approaches, action plans and strategies in common. Yet, it is normally impossi-

ble to simply transplant a comprehensive music strategy from one city to another. Strategies must take into account local circumstances including socio-economic indicators, political priorities, municipal structures and jurisdiction, and strengths and weaknesses of the local music community.

Some cities have seen relatively organic development of their music community, including the gathering of artists and the natural clustering of live music scenes. A few contributors to this report expressed fears that developing a strategy would harm the essence of their existing music scenes. However, if the music community is directly involved in the development of the strategy, evidence would overwhelmingly indicate that the scene will be nurtured and strengthened, not weakened or compromised.

Based on the findings of our focus groups, the following strategies were identified as the most effective ways to build a Music City:

- Developing a supportive policy framework;
- Establishing a city-run music office or hiring a music officer;
- Developing a Music Advisory Board;
- Engaging the broader music community;
- Ensuring access to spaces and places;
- Focusing on audience development; and
- Creating a Music tourism plan.

Research, such as the studies referenced throughout this report, informs Music City strategy development. It also helps tell compelling stories to governments and stakeholders inside and outside the music industry, to get their attention and compel them to action. In short, it is a key building block for successful Music Cities. Generally, Music City initiatives should undertake research in the following areas:

- Economic impact studies;
- Music tourism impact studies;
- Business inventories;
- Needs assessments; and
- Resource guides.



SECTION V.1
SUPPORTIVE POLICY
FRAMEWORK:
KEEPING CITIES
ON PITCH

Government policy has a direct impact on the prospects of any Music City. Whether at the municipal, state/provincial, or federal levels, policy influences all five of the essential Music City elements outlined in this report:

- Artists and musicians;
- A thriving music scene;
- Spaces and places for instruction, recording, rehearsal and performance;
- A receptive and engaged audience; and
- Record labels and other music-related businesses.

Governments can positively or negatively impact Music Cities, depending on the policies and how they are enacted. "Music-friendly" and "musician-friendly" policies encourage the growth of music creation, performance and recording, and attract and retain creative people. On the other hand, obstructive government policies make it difficult or impossible for music to be created, performed or celebrated, and can lead to an out-migration of artist entrepreneurs.

Berlin is widely known to be a great Music City. But according to Katja Lucker, CEO of the Musicboard Berlin GmbH, the city faces a major challenge. "How do we make sure that the creative people working here, and the creative companies that have located here, can still be here in a few years? How can we save the creative space for the creative people?"

MUSIC-FRIENDLY POLICIES

Some simple questions can help us judge whether a municipality is music-friendly. Do music businesses

such as live music venues, record labels, recording studios and promoters receive the message that they are wanted in a city? Are musicians valued as entrepreneurs, and are they respected for both their cultural and economic roles? Is music valued as a creative pursuit? Is it an important cultural component?

There is a range of government policies that, together, can ensure that the answer to these questions is "yes." Many of them intermingle. They include:

- Liquor licensing and enforcement;
- Venue licensing;
- Parking and transportation bylaws;
- Noise bylaws (also called environmental laws in some jurisdictions);
- Land-use planning; and
- Tax treatment.

Often, a suite of policies – mostly municipal – affects the broader economy of which music is a part. For example, live music is a major part of a city's "night economy."

"Sometimes licensing is restrictive," says the SAM-RO's Foundation Andre Le Roux, in South Africa. "Compliance should not be so much of a drain that it restricts a venue's ability to do business."

Liquor and Business Licensing

The policy area most often under the jurisdiction of higher levels of government is liquor licensing, though enforcement of liquor laws is commonly overseen by municipal agencies. Liquor laws also often overlap with business licensing and licensing to host live music performances. While necessary for safety and other reasons, liquor laws and the conditions they contain can, if overly restrictive or confusing, threaten the viability of music venues.

In South Australia, the Liquor Licensing Act requires licensed venues wishing to host live music to obtain an "Entertainment Consent".³⁰ This requirement specifies the type of entertainment that is permitted within the licence, in part to control noise issues.³¹ Citing one example – the Oostende Belgian Beer Café in Adelaide – David Grice of Musitec illustrates the constraints this imposes on venues. The Café's licence restricts it to hiring musicians who play didgeridoo, harp, harmonica, violin, flute, recorder or an acoustic guitar. Another venue is only permitted to have a 3-, 4- or 5-piece band. Solo artists and duos are barred from playing there. Navigating the narrow conditions of their licences has become a barrier to the flexibility needed to operate a successful music venue. The Music Industry Council of South Australia has prepared a submission recommending removal of the Entertainment Consent, as well as planning reforms, and Grice expects it to be tabled in Parliament. In any case, there are other ways Adelaide can address noise complaints: via other provisions within the Liquor Licensing Act and the Environment Protection (Noise) Policy 2007.³²

In New South Wales, similar licensing requirements were removed in 2009 when live entertainment became defined as "part of the normal activities of a restaurant [or] bar" such that today no additional licence is needed to play live music at a restaurant, bar, or club.³³

On a national level in the UK, the Live Music Act, which came into effect in 2012, removed the requirement for small licensed venues to purchase an additional licence to host live music.³⁴

In Toronto, provincially obtained liquor licences do not prescribe venue uses such as live music performance. Like other businesses, music venues are required to obtain a business licence from the city. The clarity ends there, however. There is

frequent confusion as to whether or not live music venues belong in the tightly regulated "entertainment licence" category, which is intended primarily for nightclubs and restricts their locations to certain areas. Live music venues have been fined by city inspectors for failing to obtain an entertainment licence even though they are not explicitly required to do so in the bylaw.³⁵ While these fines have, in some cases, been thrown out in court, there remains an unacceptable level of uncertainty and potential legal costs for live music venues in the city.

In Australia's state of Victoria, new security requirements were applied to all entertainment venues as conditions of their liquor licences, in reaction to violence in nightclubs. For example, a restaurant with a live band was required to hire two security guards. This imposed unnecessarily high costs, effectively deterring live music in restaurants. Community activism in response to these restrictions culminated in a rally by about 20,000 people in 2010 called Save Live Australia's Music (SLAM), which is described in section V.4. Ultimately, a relaxation of the security requirements resolved the issue.

Live music venues are at the mercy of liquor licensing since revenues from alcohol sales are often essential to their profitability. The costs of operating a venue and producing live music cannot typically be recovered through ticket sales or door proceeds alone. Rules that impede liquor sales, therefore, can imperil venues. Cologne, Germany, for example, introduced a new law that banned smoking in clubs, similar to smoking restrictions in many other cities. The new law has had an unintended effect. Because Cologne permits alcohol sales by outdoor carts, patrons who go outside for a smoke will also often buy drinks. As a result, according to Till Kniola of the Cologne Culture Department, the clubs have lost liquor sales, threatening their viability.



Governments, the music community and other stakeholders should work collaboratively to avoid situations where regulations have unintended consequences or prevent reasonable commercial activity by assessing perceived problems and developing appropriate, well-crafted regulatory responses. Regulations should be carefully calibrated to respect community standards and the needs of residents and other businesses, but at the same time ensure a vibrant music scene.

Parking and Transportation Bylaws

Parking and transportation bylaws can also directly impact music businesses. One of the most frequently cited challenges is loading and unloading of equipment. Cities such as Seattle, Melbourne and Austin have created loading and unloading zones near music venues, specifically for musicians. In Austin, 30-minute active loading and unloading zones have been established through a cooperative program between the ATX Music Office and Transportation Department. According to Music Program Manager Don Pitts, this “makes the task of handling musical gear both easier and safer for performers while also restoring mobility and freeing up parking for other downtown traffic.” The same consideration could be given to recording studios and rehearsal spaces in high traffic areas.

Land Use Planning

Perhaps the most complex municipal policy area affecting music is land use planning.

CHALLENGE: GENTRIFICATION

Even the most successful Music Cities around the world struggle to address competing demands on land and spaces. Music landmarks all over the world, many steeped in history like London's 12 Bar, Nashville's RCA Studio A, The Silver Dollar Room in Toronto, Melbourne's Palace Theatre, and the childhood homes of John Lennon or Sir Paul McCartney in Liverpool, have been threatened by growth around them. Some have been saved while others have not. Each situation is different, but in many cases the pattern goes like this:

1. A low rent area, possibly a bit downtrodden, becomes attractive for music venues, recording studios or rehearsal spaces and artists in general because it is more affordable;
2. Artists and music businesses move in, and over time make it an attractive, cool area to visit;
3. Property values rise and more people and businesses want to move to the area;
4. Landowners see the opportunity to sell their properties to developers who build residential units or condominiums;
5. Rising costs (sometimes resulting from new requirements for noise reduction) and/or higher rents cannot be met by music venues, studios or artists, forcing them to go elsewhere.

Some say this is inevitable, but is it?³⁶

Mark Davyd, CEO of Music Venue Trust in London, UK suggests that even though multi-use buildings can generate more profit than live music venues, we need to take a longer-term look at our cities. "The reason the people want to build in these spaces

is because they have a cultural history. (But) if by building there, they decimate the cultural activity, no one will want to live there."

According to UK Promoter Martin Elbourne, the key is that politicians and local councils understand the value of live music venues and the importance of protecting them. "Most cities don't need that many venues, he argues. But the loss of the one cool place to gather can mean young people aren't attracted to the city. In Adelaide it was the pending closure of The Jade Monkey (which has since reopened) that was the catalyst for my appointment as Thinker in Residence." At the end of his residency, Elbourne published the Reverb report, containing 46 recommendations. Twenty-three of those have been adopted in the Adelaide City Council Live Music Action Plan³⁷.

In Brooklyn, the rezoning of the Williamsburg-Greenpoint waterfront to residential use about a decade ago was one of the primary inspirations behind a grassroots music movement called NY is Music, which launched in 2014. For NY is Music co-founder Bill Harvey, the initiative is a response to the loss of the multi-faceted, mixed use area that had become home to creators of all kinds. Despite a more recent effort to prioritize "creative economy districts"³⁸ by New York City Council, Harvey remains skeptical of the music community's ability to halt progress. "We aren't going to stop the upward trend in urban real estate. It's too desirable. That's where the high value jobs are. And so the tactic is to build space for generative activity into the new city instead of implanting a suburban model into the city where people live here and go to work elsewhere." Harvey hopes that the movement to accommodate the growing numbers of people who want to live downtown will preserve adequate space for creative industries to thrive.

CASE STUDY: NASHVILLE – MUSIC ROW

Nashville has become one of America's fastest growing cities. The region's population of 1.7 million is expected to reach 3 million by 2040. This growth threatens the continued existence of the cluster of streets known as Music Row, where music businesses have historically been concentrated. Several businesses have already given way to "progress" over the past few years. A notable exception – the famous RCA Studio B where Elvis Presley laid down more than 260 songs – was saved and leased to the Country Music Hall of Fame and Museum.

Emotions rose to a crescendo in 2014 when RCA Studio A, the lesser known of the RCA Studios which played host to Dolly Parton, Loretta Lynn, B.B. King, the Beach Boys and the Monkees, among

many others, was slated to make way for condominiums. A group called the Music Industry Coalition was formed, and it managed to delay the sale until another purchaser could be found. A local preservationist stepped in to purchase the property for US\$5.6mn and the property has since been designated by the National Trust as a national treasure. The National Trust has committed to developing a strategic plan to ensure the studio's sustainability.

"I know progress is great," Pat Holt, a veteran producer and engineer who has worked with Johnny Cash and George Jones, told the New York Times. "This is my hometown, and I love to see it grow and expand. But I'd sure hate to see Music Row not be Music Row 20 years from now."³⁹

A similar situation unfolded in Toronto when the El Mocambo, a 69 year old club that has played host to the Rolling Stones, Jimi Hendrix, Blondie and the Ramones, among others, faced the prospect of redevelopment under a new owner. Again, a well-heeled preservationist stepped in to purchase the building for CDN\$3.7mn and maintain it as a music venue.⁴⁰

While it would be nice to think this could be replicated in other cities, in fact, it is very unlikely that there are enough wealthy music preservationists to save all of the world's threatened music landmarks. Therefore, a more policy-driven response is needed. Nashville is addressing the issue of gentrification head on. In February 2015, the Metro Planning Commission suspended any zoning changes for the purpose of redevelopment along Music Row for a minimum period of 16 months.⁴¹ A study of the music cluster recommends the city seek a UNESCO

World Heritage Site designation for Music Row.⁴² As Bart Herbison, Executive Director of the Nashville Songwriters Association International, explains, "Preserving heritage and cultural identity is important within a growing city. The path forward is a lot more productive if you know your history."

Is Historical Designation an Answer?

Historical designation of music properties has been pursued in many jurisdictions. In Liverpool, the homes of John Lennon and Sir Paul McCartney have been purchased by the National Trust and are available for tours. Ringo Starr's childhood home was in danger of being leveled but will now be saved as part of a city redevelopment plan.⁴³

In Toronto, The Silver Dollar Room, which was built in 1958 and has attracted such musicians as Levon Helm, Bob Dylan, The Barenaked Ladies and Blue



Rodeo, was recently spared when it received official heritage designation by Toronto City Council.⁴⁴

But even the City of Toronto champion behind this move recognizes that heritage designation has its limits.

Heritage preservation, says Mary MacDonald of the City of Toronto's Heritage Preservation Services, is about protecting something of value. For centuries it was the tangible that drove preservation – the bricks and the mortar. But today there is an ongoing international conversation about the intangible. In Toronto, music landmarks have generated the greatest public response. "Memory preservation is most important – the places that tell the story of the city's evolution. Music landmarks connect very personally with people. We must understand them in the greater context of the part they played in the live performance circuit, who went there, who performed there, and how the audience reflected the growth or evolution of the city. Music tells an important social history," says MacDonald.

But while this intangible element of music landmarks may drive the bid for designation, the tangible ele-

ments – the building, interior and exterior architectural details – continue to be what is designated. With music venues, those tangible elements may not always be evident. "It's a lot easier to make a case for ornate places because they have stature, but heritage doesn't always have to be pretty," MacDonald says. "Sometimes the grotty needs to be protected. Some people think The Silver Dollar is a hole."

Still, the greatest challenge with heritage designation is that while you can designate a building, and perhaps interior elements, you cannot prescribe how the property is used. You can only encourage it. MacDonald points out that The Silver Dollar will only be saved as a music venue if the people who own it choose to do so.

In light of that, is heritage designation still worth pursuing? MacDonald believes the answer is yes. "We can't presume what will happen. Designation could encourage someone to continue to use it as a venue because it's a landmark and has more value. It can become a selling feature even for developers because an historic music venue has meaning for the community and in a culture."



Photo Cr dit :   Partenariat du Quartier des spectacles, St phan Poulin

Cultural District Designation

Pre-existing clusters of music venues and businesses, such as Music Row in Nashville, can be candidates for designation either as entertainment or cultural districts.

Montreal's Quartier des Spectacles⁴⁵ is a designated cultural district that recognizes the historic development of a theatre, music and artistic section of downtown Montreal, enhances it through infrastructure and cultural programming investments, and promotes it. It has 30 venues in one square kilometre and hosts more than 40 festivals. According to Emmanuelle Hébert of the city's Department of Culture, the initiative was sparked by cultural leaders but gained support from governments at the provincial and federal levels under the city leadership. The city has invested CDN\$150mn in the project to establish the needed and adapted infrastructure for cultural outdoor events and has mandated a non-profit with the management and cultural programming of the area's public spaces, besides regular festival programming.

Austin Music People, a music lobby group, successfully led a campaign to have a four-block area of Austin that includes some of Austin's most famous music venues including the Mohawk, Stubb's and Elysium, recognized as a live music district. The Red River Cultural District, approved by Austin City Council in October 2013, gives live music venues more influence over development planning in the vicinity. The designation was leveraged to speed up approval of musician loading and unloading zones, and to create opportunities for cooperative marketing and promotion.⁴⁶

Conversely, there are efforts in many cities to create new arts clusters where they did not previously exist. An industrial area of Marrickville, Australia, for

example, has been identified as a strong candidate for a creative industries hub. The proposed Sydenham Station Traditional and Creative Industries Hub would permit uses considered complementary to continued industrial uses, while presenting an opportunity for revitalization. The hub was proposed following extensive community consultation, in response to a number of key policy recommendations including Sydney's Live Music and Performance Action Plan.⁴⁷

CHALLENGE: THE PERCEPTION THAT MUSIC IS INCOMPATIBLE WITH OTHER LAND USES

Beyond the challenge of gentrification, which often drives up property values and rents to an unsustainable level for music businesses, the music businesses that initially made an area attractive are often perceived as unwanted neighbours.

A recent survey of more than 100 music venues in the UK has identified the problem as one of noise versus nuisance.⁴⁸ Music Venue Trust's Mark Davyd, explains that in the UK, by consequence of law, "Music is identified as a noise, noise is identified as a nuisance, and nuisance is the responsibility of the person who created it." To compound the problem, the music community has not done a good job explaining the value of small clubs. As a result, many venues are challenged on issues of noise or planning and don't have the money to mount a proper defence or to upgrade their facilities in order to meet stricter requirements. This, in addition to the challenging economic environment for small clubs, has resulted in a significant decline in their numbers. In London in 2010 there were 400 small clubs; it is estimated that there are 100 fewer today.

London is not alone. Musicboard in Berlin seeks to find a middle ground between the competing interests of investors building new flats and the live

clubs that preceded them in the neighbourhood. "A few years ago no one wanted to recognize that this is a problem but now everyone recognizes it," says Katja Lucker, CEO, Musicboard. "We need to be sensitive about this topic."

The same issues – noise complaints and perceived conflicting interests between new residential developments and music venues – are behind new legislation in San Francisco that would provide legal protection for existing venues. The legislation, introduced in late 2014 and now under consideration by city legislators, is designed "to help preserve San Francisco's live music venues during a time of rapid new residential construction," according to a news release announcing the initiative.⁴⁹ "The legislation requires developers to engage with existing venues from the outset, protects venues from unfair complaints, and ensures residents are informed about a nearby venue before they rent or buy."

The proposed law follows the closure of several storied San Francisco venues in the wake of accelerating residential development into traditionally industrial and commercial areas. Longstanding venues there have increasingly faced noise complaints from new residential neighbours.

Supervisor London Breed, the legislator behind the proposed law, remarks that, "San Francisco's nightclubs, bars, and theaters attract 16,000,000 customers each year and generate over \$800,000,000 in spending. But more than that, these venues are an integral part of our culture, of what makes us San Francisco. As we build more housing for everyone who wants to live here, we have to protect the reasons why they want to live here in the first place."⁵⁰

Specifically, the legislation would:

- Prevent venues that are operating within their permit from being deemed a legal "nuisance";
- Require better sound testing before developers can build near a venue;
- Oblige developers to work with nearby venues and the Entertainment Commission well before construction begins;
- Ensure that prospective residents of units near a venue are informed about the venue beforehand; and
- Improve communication among relevant City departments and empower the Entertainment Commission get involved early in the development process.⁵¹

CASE STUDY: AGENT OF CHANGE PRINCIPLE, MELBOURNE

In August 2014, the Victoria State Government introduced a suite of reforms called the Live Music Action Plan in response to a 2012 Industry Position Paper by Music Victoria. Among them, was the Agent of Change Principle, which was adopted in land use planning and informs decisions by liquor licensing authorities. The Agent of Change Principle determines which party is required to adopt noise

mitigation measures in situations of mixed land use. If the "agent of change" is a new apartment building that is being built near a pre-existing music venue, the apartment building is responsible for sound attenuation. On the other hand, if the music venue is undergoing renovations and therefore is the "agent of change" in the neighbourhood, it is responsible for noise mitigation.

The Victoria Government also announced a half million dollar fund to assist heritage venues in addressing noise mitigation.

The Agent of Change Principle works well where there is a concentration of established music venues that are threatened by encroaching residential developments. An effort is now underway to have this principle adopted in part of London, UK.

However, in areas where there is an effort to increase the number of music venues, the principle may not be the best policy choice. If the “agent of change” is the music venue itself, then the protec-

tions put in place by the Agent of Change principles may, in fact, deter or even prevent the establishment of the new venue.

For that reason, it may be best to consider agent of change only in very specific districts of a city. Montreal’s Emmanuelle Hébert says the principle was adopted in 2014 in Plateau Mont-Royal, a borough of the city that is described as moving “to its own funky beat.” Plateau Mont-Royal is a mixed-use neighbourhood, home to many artists, students and young families, and brimming with nightlife including theatre and music venues. It has the highest concentration of artists and cultural workers in Canada.

RECOMMENDATIONS

1. Government departments responsible for liquor licensing, business licensing and other public safety measures, should work with the music community to identify compliance issues that restrict business growth in an effort to identify mutually-beneficial solutions.
2. Transportation planning and parking zones should take into account the needs of existing and developing music business clusters for efficient access. This should include short-term, reserved parking spots for active loading and unloading.
3. Land use planning should take into account culturally significant sites and zones to protect their ongoing viability, recognizing that these are often the assets that make neighbourhoods attractive to additional investment. Developers should be required to take into account these existing sites as part of the planning process, coordinate their activities with all relevant city departments, and inform future purchasers about the presence of music venues and clusters.
4. Music communities should explore the viability of historical designation or cultural zone designation to bring awareness to the value of individual sites and zones.
5. The Agent of Change Principle should be explored in areas where there is already a significant number of live music venues.

MUSICIAN-FRIENDLY POLICIES

A critical mass of artists was most commonly cited, during interviews for this report, as being essential for any Music City.

"It comes down to the quality of the music," says Ian James, Managing Director of Mushroom Music Publishing, Australia's largest music publishing company. "In the end, the great thing is where geniuses live, where magnificent music is made. That's the enduring legacy."

Many interviewees describe an organic clustering of artists and musicians in their cities: that the musicians were there before the city government, associations or agencies became involved – even before music businesses. "Musicians tend to congregate around other musicians," says Austin's Bobby Garza of Transmission Events. "The city wouldn't have responded if musicians didn't flock here as they have over the past few decades. You need that organized level of involvement. You can't manufacture that."

Musicboard's Katja Lucker describes a similarly organic gathering of artists in Berlin: "Berlin is a really special city because of the wall and the times after the wall came down. It became a really wild place

where the city said you can do anything you want to build up a new scene, which created a unique culture of creativity in Berlin. That was the reason why I came to Berlin."

While it may be impossible to "manufacture" the secret something that causes artists and musicians to gather in a city in the first place, it is possible to create a more sustainable environment for musicians and artists with "musician-friendly" policies and programs, many of which are likely to be driven by the public and private sectors.

KEY CHALLENGE: AFFORDABILITY

If the goal of musician-friendly policies is to create a more sustainable and fertile environment for artists so that they can have the freedom to create, then affordability must be considered. A low cost of living has been identified as one of the motivators for artists choosing certain cities or regions. Montreal continues to press this as an advantage, as does Berlin, though there are concerns that Berlin is not as affordable as it was 10 years ago; Tennessee has the second lowest cost of living of all U.S. states, the second lowest state and local tax burden and no personal income tax on wages.

"Musicians are constantly used as a draw to get potential clients into businesses. It would be good to make them feel valued. Small gestures of appreciation go a long way."



Photo Credit: Berlin Clubcommission

As the cost of living increases in many cities, musicians' incomes generally do not keep pace. Austin Music People has identified a critical gap in the rising cost of housing, for instance, and the stagnant incomes of musicians.⁵² Numerous housing projects have been completed in Austin to provide musicians with affordable apartments and communal housing. "Without a doubt, affordable housing is an issue that impacts many citizens beyond Austin's musicians and other creatives, but the opportunity cost to the city if those who build our "brand" can no longer afford to live here is a significant one."⁵³

Nashville has put a similar focus on affordable housing for musicians. In 2013, it completed Ryman Lofts, an affordable housing project with 60 apartments geared towards artists.

Musician Business Training

Inextricably linked to the issue of affordability is a musician's income. If artists and musicians'

incomes were significantly higher, then affordability wouldn't be an issue.

However, earning a living as an artist has never been easy, and according to some, is even harder today. Robert Levine, past executive editor of Billboard, sums it up well: "It has never been easier to distribute a creative work. At the same time, it's never been harder to get paid for it."⁵⁴ Live performance income is increasingly important for artists, but touring costs are high. And while record companies have safeguarded investment in artists as a proportion of their income as much as possible, their revenues are roughly half of what they were before 1999, meaning there is less money to invest.⁵⁵ Moreover, notes Patrick Donovan, CEO of Music Victoria, "bands are charging the same for their shows at small venues as they did 25 years ago."

Asked how he would judge the success of Music City strategies, Musitec's David Grice responds, "Just to be able to provide a future that enables people to make a decent career out of music."

“We have doctors and lawyers who make a lot of money and we have musicians who have more intellectual property than those guys, who struggle to make minimum wage.”

David Grice, Musitec, Adelaide

The availability of professional development services for musicians is not only an aid to furthering their skills as small-business entrepreneurs, but also in making a municipality more musician-friendly.

The Bogotá Chamber of Commerce, which prioritized music and other cultural industries as a key economic sector, is developing 30 different services to support these industries. The services include professional development and training. According to Gareth Donal Gordon, the Chamber discovered that few artists and musicians know how to build their businesses and monetize their work. In Memphis, The Consortium MMT (Memphis Music Town) offers a national mentorship program with a six-week intensive process for young artists to enhance and further develop their creative brand. David Porter, Founder and CEO of The Consortium MMT, explains that the program, “champions the history of Soul music while providing young artists with backstage access to the music industry with mentorship support by superstar established artists. This unique concept helps to bring back the credibility of the music-making process, giving

artists the necessary tools to become the Soul music stars of tomorrow.”

The future establishment of a new Talent Development Center complex in downtown Memphis, will be used to further the goals of artists who will have gone through the program.

Chicago has adopted a comprehensive music strategy that focuses on leadership and government support, live music and education. Retention of the creative class is a key objective. In consultations and focus groups, creative industry employees between the ages of 18 and 25 were asked how the city could help them succeed in Chicago, as a way to dissuade them from moving to other cities such as Austin. Access to networks and mentors emerged as a primary need, and the Chicago Track program was created.

The program provides professional development and networking opportunities along with workshops that often lead to internships in the music industry as well. The program has a high level of retention.

CASE STUDY: COALITION MUSIC, TORONTO

Coalition Music, which started as a music management company in 1991, now supports artists' development at all stages of their careers. It is the home of Canada's Music Incubator (CMI), a not-for-profit corporation, and the high school-focused registered charity, TEMPO (Through Education Music Provides Opportunity).

Within the renovated walls of a former convent, entrepreneurs Eric Lawrence and Rob Lanni have built studios, rehearsal spaces, professional development and educational programs, and performance space, to provide artists with a place to create, learn and hone their skills. CMI provides professional development in two areas: Artist Entrepreneur and Tour & Tech. Separately, TEMPO offers "The Music Business", an accredited and free, high school course as a complement to traditional in-school music teaching.

Outside of these programs, space is available for producers, labels, music publishers, marketing services companies and songwriters for short or long-term rental, thereby encouraging collaboration and cross-pollination of ideas. With state-of-the-art facilities, staff mentors and a vast network of music professionals, Coalition Music, CMI and TEMPO provide ongoing training and support for young people wishing to pursue almost any avenue within the music industry. Government funding and broadcaster support is also utilized in order to limit the cost of professional development for participants. In 2013, TEMPO also began taking its high school programs on the road to remote Aboriginal communities.



The Support Team: Music Professionals

As noted in the Key Elements section, successful Music Cities offer an array of music businesses and music professionals who form larger teams supporting artist entrepreneurs. These include labels, managers, agents, lawyers and publicists. For high quality recording studios, experienced recording engineers and producers are also needed. Identifying any gaps in this larger group of professionals is a first step for Music Cities to develop ways to train and/or attract the talent they need.

Bobby Garza of Transmission Events in Austin believes that filling some of these gaps would help enable the expansion of his city's US\$2bn music industry to a US\$3 or \$4bn industry. He explains that artists in Austin face challenges monetizing their product. There is a particular need for more labels in Austin. Entertainment lawyers are also in short supply there, Garza adds. He believes that filling

these gaps should be a priority for music investment and business attraction in Austin.

Similarly, professional gaps have been identified in Adelaide. In his research for the Reverb report, Martin Elbourne discovered that the city had no artist managers. More recently, the city has identified a shortage of high level producers, according to David Grice. To fill the void, Musitec is examining options for training engineers – of whom there are plenty – as music producers.

Numerous government policies have a direct impact on the music economy's viability and success. A city's level of "music-friendliness" and "musician-friendliness" is closely tied to those policies. Working with the music community is the best way to maximize Music City benefits, resolve issues and avoid unintended consequences of regulation and enforcement. The chapters that follow provide some models for that engagement.

RECOMMENDATIONS

1. Conduct a needs assessment of your community of musicians, singers, songwriters and producers in order to identify policies that can help them succeed along with key challenges and obstacles to pursuing music as a vocation.
2. Inventory the music professionals and businesses available to support artists in their careers including managers, agents and labels.
3. Based on these assessments, identify the priority needs and opportunities. These may require financial support, infrastructure spending, training or programs in other areas.
4. Identify key public and private sector players who can help deliver programs to meet the identified needs and priorities.



SECTION V.2
CITY MUSIC OFFICE:
LAYING DOWN
THE TRACKS

Music offices or officers (though not necessarily by that name) are present in one form or another in many of the cities studied for this report. They include Seattle, Austin, Melbourne, Chicago, Toronto, Hamburg, Berlin, Bogotá, Kitchener (Canada), Montreal and Cologne. The larger the office, the greater its scope. In cases where there is a single officer, the role tends to be more narrowly defined. Ideally, a well-established music office will carry out the key functions outlined below.

KEY FUNCTIONS

Navigating City Hall

One of the basic functions of a music office is to be the main point of contact at City Hall for music businesses, including live venues. As described in the previous chapter, many municipal government policies and regulations impact music, and hence many city departments have some level of authority over music businesses. In some of the most successful Music Cities, experience has shown that a single office or point of contact at City Hall is the best way to ensure clear communication and direction between the municipality and the music community.

Bill Harvey, co-founder of NY is Music, makes the comparison between New York's approach to film and television productions vs. live music: "If I'm a film company and I want to shut down Times Square during rush hour, I go to one person and I have a permit in three hours. If I'm a musician and I want to plug in an amplifier and play music in the park, I have to go to multiple departments to secure permits in the double digits."

Prior to the creation of the Music Sector Development Officer position in Toronto in 2014, music stakeholders found that, "the environment for getting business done with city government is not particularly easy for them to navigate."⁵⁶ The city's new Music Officer, Mike Tanner, says he is "aiming toward one-stop shopping – as easy and decipherable as possible."

The Seattle Office of Film + Music, as the principal body responsible for advancing the goals of Seattle's City of Music program, is responsible for special events in the city, serving as a one-stop shop for promoters and producers of live events. The office facilitates meetings between city departments (fire police, licensing etc.) and promoters and event managers. "We literally put them in the same room," says Director Kate Becker.

Liaison with Music Commission or Advisory Board

In cities with a volunteer music advisory board, committee or commission, the music officer typically acts as the primary city staff support or liaison. Seattle's Kate Becker, for example, facilitates the connection between the city's Music Commission and the Office of Film + Music as part of her role as Director. Her duties include staffing Commission meetings and developing meeting agendas. This role helps her support Seattle's three goals as a Music City: to be a city of live music, musicians and music business.⁵⁷ Similarly, in Melbourne, Toronto and Austin, the music officer leads this activity.

Lead a City's Music Strategy

Many successful Music Cities have a music strategy that has been endorsed by City Council. These are multi-year, complex plans that benefit from a single staff or department lead.



"Experience the City of Music at Sea-Tac Airport" program, Central Terminal, The Side Project performing, Photo Credit: Port of Seattle

Similar to Seattle, in Melbourne, Hannah Brooks' main job as Business Advisor is implementing the city's Music Strategy. In Bogotá, the City of Music plan, developed following a successful application for a UNESCO designation, falls within the Department of Culture, Recreation and Sport.⁵⁸ And in Chicago, Dylan Rice is the staff lead for music at the city's Department of Cultural Affairs and Special Events (DCASE).

In other cities, including Adelaide, Memphis and Nashville, where there are music strategies but no music office or officer, the volunteer advisory boards take more of a leadership role.

Internal Advocacy/Education about Music

A music officer who understands the issues and challenges facing the music community can also serve as an advocate or educator within City Hall. Don Pitts, Music Program Manager for the City of Austin, explains that his department "serves as a resource on live music issues." Jennifer Houlihan of Austin Music People (AMP) agrees, explaining that the relationship between AMP, the Music Commission and the City Music Division "is powerful when they are working in lockstep on the same agenda items."

In Gothenburg, Sweden, this function is often performed by the public tourism agency where Fredrik Sandsten describes his role as, "a link between the music businesses and the politicians. It is very much our job to make things happen quickly if it is something we support and believe in."

Mediation

City music officers or offices often serve as mediators between music stakeholders and other external groups. Berlin's Musicboard, a government-funded

agency that functions similarly to the Austin Music Division, helps to mediate issues that arise between clubs, residents and city officials. Toronto's Mike Tanner sees mediation becoming an important part of his role, using communication as a tool to prevent conflicts. "People don't like to be surprised," he says. "There is an opportunity to channel communication through Business Improvement Associations, Councillors' offices and community groups to help smooth the relationships between live music venues and their neighbours."

Education/Networking Programs and Events

Music offices often host or support programs and events that focus on networking or education. For example, Austin's Music Division funds the Music Industry Collaborative (MIC), an applicant-based mentoring program delivered by the Austin Music Foundation. "MIC fast-tracks the resources that busy music entrepreneurs most urgently need," Pitts says. "(It provides) meaningful dialogue with real-life entrepreneur mentors in a structured small group setting that also encourages peer-to-peer assistance."

Chicago's DCASE organizes similar programs. After several successful education and networking initiatives, Dylan Rice says his department is developing the largest free convergence of professionals from music and other creative industries. The Lake FX Conference will connect artists with new media to help them achieve success.

Berlin's Musicboard provides funding to the Berlin Clubcommission, which in turn provides basic support for its member nightclubs to assist with legal, financial, security and health and safety issues. Clubcommission also recently adopted an educational role with the producers of open-air music parties. The initiative is a response to height-

ened community concern over the parties, which consume a significant amount of police resources. At an information session attended by 150 of these impromptu event planners, the Clubcommission offered to support them, if the organizers made efforts to address the concerns raised by the broader community. Organizers were asked to sign a 10-point agreement that includes a commitment to keep noise at a reasonable level, and leave the parks the way they found them before their events. Clubcommission created a starter kit for open air events that includes trash bags, ashtrays and the agreement, among other helpful items.

Grant or Loan Programs

Municipal financial support for the music community, where it exists, can be funneled through music offices. However, this function is distinct from the direct funding provided by Arts Councils to artists in a wide range of creative sectors. Berlin's Musicboard, which is funded by the City of Berlin, in turn distributes funding to Berlin-based music companies, organizations or artists. Musicians can apply for scholarships and for new projects in Berlin or abroad. Musicboard also provides financial support to the Berlin Music Commission, which organizes networking and conferences for the business side of the music community, in addition to the Berlin Clubcommission programs mentioned above.

The Music Venue Assistance Program in Austin provides low interest micro loans to qualifying establishments to enhance the sound quality of indoor and outdoor venues while reducing the sound impact on neighbouring uses, according to Don Pitts.

In Paris, the city government provides financial support and other assistance for the broader music community. This includes €8.2mn for facilities and venues dedicated to contemporary music, almost

€800,000 for music festivals and other funding for music work spaces, special projects and setting standards for disabled access at venues.⁵⁹ One of the key funding priorities is to support innovative and creative projects that help to create a stronger professional music scene in Paris while encouraging the emergence of new artists, and new forms of creation and music distribution, according to Marianne Revoy, Conseillère culture (Cultural advisor) in the office of Paris Mayor Anne Hidalgo.

The music branch of Hamburg, Germany's Department of Culture supports the city's music community through financial support for small labels, venues and other recipients, and by acting as a hub for other public and private sector organizations involved in music. These organizations include: "Hamburg Kreativ Gesellschaft" (municipal institution founded to promote Hamburg's creative industries); RockCity Hamburg e. V. (organization for Hamburg-based musicians); LiveKomm (federal German live music commission); IHM (Hamburg Music Business Association); Clubkombinat Hamburg e. V. (Hamburg music venue and club association); and VUT-Nord (indie label association). The Department of Culture's Johannes Rösing says the music branch "cannot plainly be called a one-stop-shop for the music community. To attain the best results from our support we work closely with various institutions and associations."

ORGANIZATION AND REPORTING STRUCTURE

The most all-encompassing music offices are stand-alone agencies or departments. Berlin's Musicboard has three full-time staff and two casual employees. Seattle's Office of Music + Film has five full-time staff plus a part-time staff person, but

is responsible for both film and music. The Austin Music Division has five full-time, music-focused employees and is a department within the Economic Growth and Redevelopment Services Department.

In other cases, cities have a primary music contact or a music officer who works within a larger department. Naturally, they cannot be responsible for as wide a scope of activities as an entire music office. However, often they are able to rely on the support of other colleagues within their department.

Examples where a single music officer is housed in a larger department include Montreal, Gothenburg, Toronto and Melbourne: Emmanuelle Hébert is part of a 200-person Cultural Department at the City of Montreal; Fredrik Sandsten works in a state-owned destination company in Gothenburg with 120 employees; Mike Tanner's music development role is the single music-focused position in a 30-35 member department that includes Tourism and Visitor Services, Film, Television and Digital Media and Event Support.

Music Officer Background

In most cases, music officers have previous experience in the music industry or another creative industry.

In a media interview promoting one of his first major initiatives, Chicago's Dylan Rice draws the link between his current role and his past work as an artist: "I've lived and breathed [this industry]," he told Michigan Avenue magazine. "I've worn all the hats, I've made some mistakes, and I've learned the hard way. I empathize with a lot of artists who are trying to do it. So I'm hoping my experience as an artist is informing my experience in government."⁶⁰

Andrew Vincent, a musician based in Ottawa, Canada and author of *Connecting Ottawa Music*, notes, "Someone needs to be in the city who has a personal connection to music, who brings that perspective, who has travelled and seen what others have done in other cities."

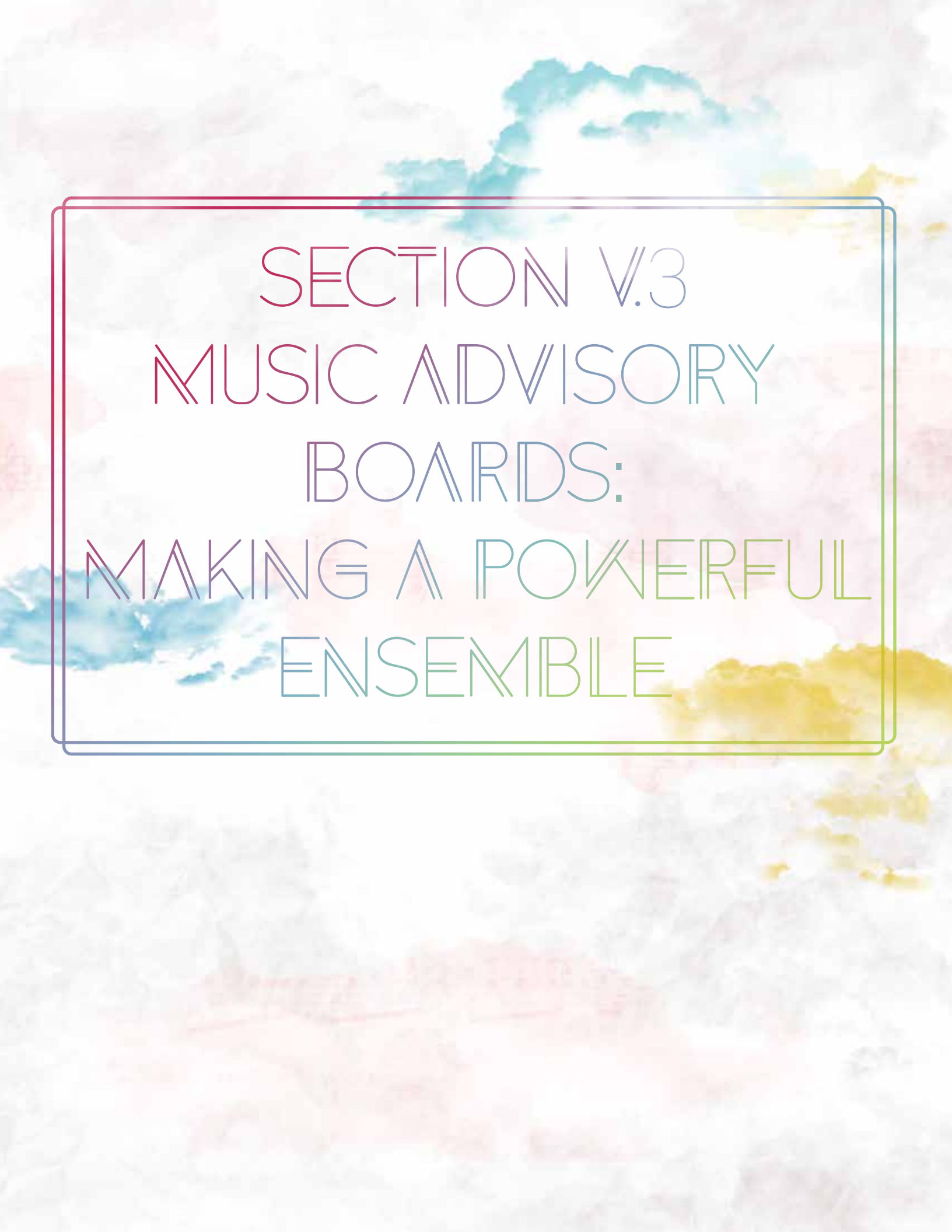
CHALLENGE: CHANGES IN POLITICAL LEADERSHIP

Political support is fundamental to maintaining government commitment to a music office, not to mention a larger music strategy. Chapter V.4 describes how consensus in the music community is the best way to develop political support. But political leadership is prone to change. This can spell uncertainty for music programs.

Mayors in Berlin, Chicago, Toronto, Seattle and Austin have been instrumental in securing budgets for music officers and their programs. Three of those five cities have recently undergone a change in leadership. Whether or not this will affect those cities' music programs remains to be seen. Strategies outlined in the next two sections are designed to overcome this potential hurdle: establishing a music advisory board, and most importantly, fostering an engaged and supportive music community.

RECOMMENDATIONS

1. Establish a single point of contact – whether an individual or team – for the music industry within City Hall mandated to:
 - a. Help the music community navigate relevant city government departments and policies;
 - b. Lead the city's music strategy or lead the development of a strategy if one does not exist;
 - c. Liaise with the volunteer music advisory board or commission;
 - d. Help other city employees, agencies and elected officials understand the issues facing the music sector; and
 - e. Mediate between the music community and other community groups in order to resolve conflicts.
2. Music should be recognized as a commercial industry, and therefore the officer should be housed in a department focused on economic development.
3. Ensure the person hired as a music officer has direct experience in a creative industry, preferably music.
4. Engage the broader music community as well as political decision-makers to continuously promote the importance of the music officer/office to ensure sustainability and continued funding.

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SECTION V.3
MUSIC ADVISORY
BOARDS:
MAKING A POWERFUL
ENSEMBLE

Music Advisory Boards or Commissions provide an effective link between a city's music community and local or provincial governments as well as other city stakeholders. They are a forum to generate dialogue within the music community and open lines of communication to others in the private and public sectors. In keeping with their names, they are generally advisory in nature, rather than decision-making bodies. Some boards participate more heavily in the delivery of programs. For instance, the Memphis Music Commission, supported by an Executive Director, provides a legal clinic, pre-paid health care plans for musicians, workshops, seminars and other services.

The overarching purpose of Music Advisory Boards is to enhance the environment in which music operates within a city. In some cities, this is defined in very broad terms. The Conseil Parisien de la Musique (Paris Music Council), created last year under the administration of Mayor Anne Hidalgo, while still in its early stages, seeks to find ways that the public and private sectors can together support emerging artists, enhance venues, improve contemporary music education, boost marketing efforts, and ensure that Paris's music scene offers rich and diverse musical offerings at prices that are accessible to all. In announcing the Council's creation last year, Paris Deputy Mayor Bruno Julliard said the initiative will bear fruit only if all the players – both private and public sector – agree to share the costs of the proposals it advances.⁶¹

Depending on the level of government with which they interact, resolutions passed by a music advisory board will either proceed to a city music office, committee of city council, full city council, mayor's office or premier's/governor's office.

Research for this report identified music advisory boards or committees in the following jurisdictions: Austin, Nashville, Memphis, Seattle, Bogotá, Paris, Berlin, Melbourne, Toronto, Wollongong and South Australia. Some other cities have advisory boards with a broader cultural mandate, of which music is a part.

CORE FUNCTIONS

Music advisory boards typically fulfill the following functions:

Create consensus within the music community

Music advisory boards most often include music industry leaders representing all segments of the music industry. The boards create a forum for discussion of issues affecting the music community and a means by which to develop consensus and present a unified voice to government.

Provide advice on the regulatory and legislative environment

Music advisory boards act in an advisory capacity to government on legislation, regulations and programs. This often means that boards have the ability to draft resolutions for a committee of council, full city council, or for the Mayor or Premier, depending on the level of government with which they interact.

Provide opportunities for the music community to liaise with key city stakeholders

Music advisory boards create opportunities for information exchange and advice between the music community and other key stakeholders such as chambers of commerce, tourism and convention agencies, neighbourhood associations and government departments involved in economic development or arts and culture.

STRUCTURE

There is no “one size fits all” model when it comes to music advisory boards. Depending on the city, there are variances in size, structure, members, member selection, and the level of government with which they interact.

Size

Berlin’s Music Advisory Board (which advises Musicboard, the city’s de facto music office), has only 11 members, whereas Toronto’s Music Industry Advisory Council has 35. Nashville’s Music City Music Council started with 40 members, but through restructuring the number has been reduced by half.

Membership

Most music advisory boards are composed primarily of leaders from the music industry, with key elected representatives and government staff from relevant departments or agencies. Music industry representatives at the municipal level tend to be appointed by the mayor, city council or a combination of the two, but in some cases are appointed by the city music office or an equivalent body.

Some boards contain a broader membership that incorporates community leaders whose roles have a connection to music – for instance, tourism agencies, hotel associations, Chambers of Commerce and music commissions or officials serving a higher level of government. The recently established Conseil Parisien de la Musique, for example, brings together officials from three levels of government – municipal, regional and national – to work with music stakeholders on policy issues. Those stakeholders include major and independent music labels, venues, music publishers, record shops, artists’

unions, music associations, trade unions and music academies.⁶²

Membership composition is critical as has been discovered in Bogotá, where music is the focus of one of six councils for the arts. Juan Luis Restrepo of the City’s Department of Culture, Recreation and Sport, stops short of calling it a formal music advisory board, but many of its functions are similar: it is supposed to “approve, discuss, debate and agree on general public investments in music in the city and assess the City of Music program in its strategic decisions and long term policies.” However, Restrepo notes that the efficacy of the council is hampered by the lack of participation of “really strong actors in the music scene.”

Jurisdiction

Some music advisory boards have been established at the provincial or state level, rather than the municipal level. These focus on the overarching needs of a state/provincial music community and the impacts of the legislation, regulations and programs overseen at the provincial/state level.

Committee Structure

Several of the larger music advisory boards have a committee structure that enables more detailed analysis of specific issues, and task-oriented work. Seattle’s 21-member Music Commission, for example, has subcommittees pertaining to policy, youth and community, executive operations and social justice.

In South Australia, the 12-member music industry council relies on as many as 40 additional music community members who participate on issue-specific subcommittees.⁶³

The new Conseil Parisien de la Musique directs working groups to focus on different policy areas. The entire council, which has neither a budget nor a president, will meet as seldom as twice a year in a plenary session.

OPPORTUNITIES

Music advisory boards present an effective means to avoid potentially negative impacts of government legislation on the music community. Don Pitts, Austin's Music Program Manager, explains that the Austin Music Commission is expected to "study the development of the music industry, assist in the implementation of programs to meet the needs created by the development of the industry, and review matters that may affect the music industry."

Austin Music People's Jennifer Houlihan describes the process: "We do as much work as possible with stakeholders before it gets to the Music Commission, so by the time they get it, they are only passing things to City Council that are as bullet proof as possible. It gives council cover, so that they don't get a surprise backlash."

Music advisory boards also lead studies on the music industry. The Live Music Taskforce established


in Wollongong, Australia began its work with a live music survey that identified the active venues and level of music activity, as well as a tour of licensed premises for relevant city staff. Advisory boards in Austin and Nashville have commissioned economic impact studies.

In Nashville, the report's findings were used to drive economic development initiatives, thereby supporting one of the Music City Music Council's primary goals: to attract and recruit entertainment companies to the city. As Hank Locklin, the Senior Advisor of the Music and Entertainment Industry for the State of Tennessee, explains, this helps to cement Nashville's image as a "vibrant Music Business City" through its consistent high ranking of music related output and workforce when compared to the rest of the U.S.

The Council is also involved in partnerships with the Entrepreneurial Center in projects such as the Musicpreneur program, which enlists local music industry leaders to engage with young entrepreneurs about their involvement in the future of the music industry.⁶⁴ In addition, it is involved with an Entrepreneur Center initiative called Project Music, a 14-week music tech accelerator program launching in 2015.⁶⁵

RECOMMENDATIONS

1. Develop a music advisory board representing a cross-section of the music community and key decision makers in agencies that have an impact on music (e.g. tourism agencies).
2. Enlist the involvement of music industry representatives with larger networks to facilitate two-way communication with government.
3. Governments should utilize the music advisory board as a sounding board for legislation, policies and programs, providing members with ample opportunity to study the issues and engage their networks to provide feedback and ideas.

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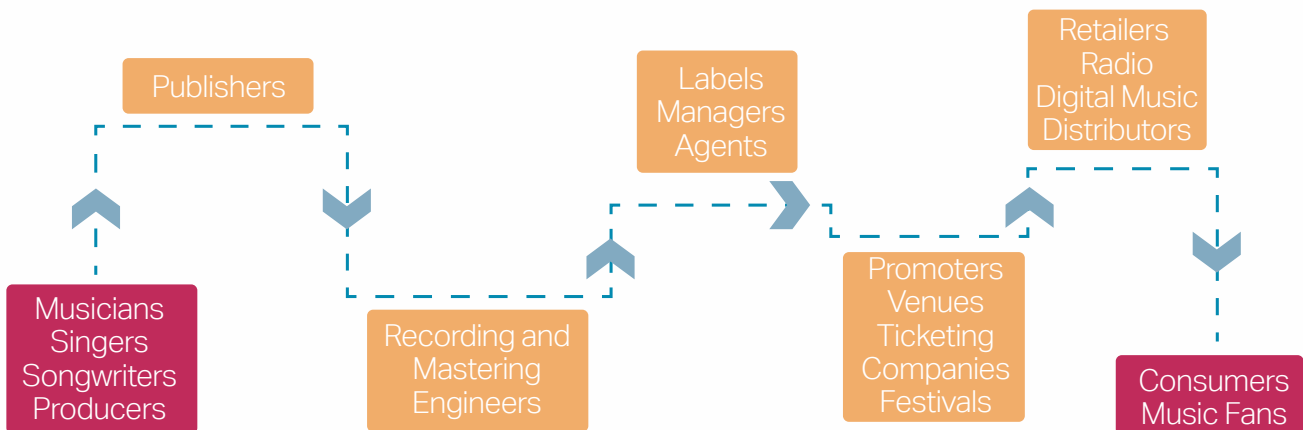
SECTION V.4
ENGAGING THE
BROADER COMMUNITY:
PUTTING THE BAND
TOGETHER

Music City development will, without question, only be successful with the engagement of the people impacted most – the music community. Whether it is the private or public

sector that initiates this engagement appears to be immaterial. In some cases, the music community has been the initiator, often in response to acute challenges to their livelihood. In other cases, a government body has set out to engage the music community in order to grow the sector. Whichever side gets the ball rolling, the key is that all relevant players are involved.

DEFINING THE BROADER MUSIC COMMUNITY

Many of the strategies addressed in this report deal most directly with live music. This should not be surprising, since live performance is more significantly impacted by the municipal policies cited in section V.1. However, all aspects of the music ecosystem are inextricably linked and therefore stand to gain from effective Music City strategies. For that reason, this discussion of music community engagement includes stakeholders at every step in the music value chain:



BARRIERS TO COLLABORATION

“There’s a crab in a bucket infighting mentality within the music industry that comes from scarcity.”

Jennifer Houlihan, Austin Music People, Austin

A variety of barriers to engagement of the broader music community were identified by music industry experts interviewed for this report:

- The informal, almost cloistered, do-it-yourself nature of most music creation and distribution today;
- The involvement in music of many part-time workers and hobbyists;
- The reality that many small and medium-sized businesses and artist entrepreneurs are, by necessity, focused exclusively on making ends meet;

- The lack of sufficient professional advisors (managers, lawyers, agents, etc);
- Competitive issues among key stakeholders; and
- The absence of an advocacy organization representing the commercial music sector.

Overcoming a tendency among music community members to view others as competitors, rather than collaborators, has been a key priority in Toronto.

"The local music community supports itself in ways in 2015 that were unheard of in 2011," says Mike Tanner, Music Sector Development Officer at the City of Toronto. "Music Canada helped bring together a lot of disparate voices under one tent, looking for areas of commonality where they could all benefit and engage different levels of government to get support. Most of the good operators have put most of the squabbling on the back burner. There's a lot of willingness to collaborate now."

Conflict Serves as a Catalyst for Engagement

When the music community overcomes these barriers by pulling together, it is often in response to conflict or crisis.

In Paris, conflict between residents and operators of bars, nightclubs and other night-time activities inspired a petition entitled "Paris: When the night dies in silence," as well as collaboration by affected stakeholders and, ultimately, to a response by the city government.⁶⁶ This culminated in the creation by Paris Mayor Anne Hidalgo of the Conseil parisien de la nuit (Paris council of the night), in late 2014. The council brings together elected officials from every city district, institutions, associations and others to find sustainable solutions and to help pacify relations between residents and night-time

revellers. It works in collaboration with the newly formed music council to develop solutions and enhance night-time music activity, says Marianne Revoy of the Paris Mayor's Office.

There are many other examples: the threat to historic venues and recording studios in Nashville spawned the creation of the Music Industry Coalition; a loss of venues in London led to the establishment of the Music Venues Trust; and, burdensome regulatory changes to live music in Australia inspired Save Live Australia's Music (SLAM), the organization behind the largest cultural protest in the country's history.

Rallying support in times of crisis is always easier than in times of peace.

CASE STUDY: SLAM RALLY, MELBOURNE

Save Live Australia's Music (SLAM), a national activist group based in Melbourne, Australia, was created in 2010 in response to new liquor licensing laws that threatened the viability of live music in the State of Victoria. The restrictive laws were passed in reaction to incidents of violence at some nightclubs.

SLAM, a volunteer-run group, organized what became the largest cultural protest in Australia's history, on February 23, 2010. Musicians and music lovers were encouraged to march on Parliament House to protest the "draconian regulations" that "threaten to pull the plug on live music".⁶⁷

The protest organizers predicted that more than 10,000 would join the march. In fact, 20,000 people took to the streets.

The huge turnout got the attention of politicians. Ultimately, the restrictive laws were eased and the live music industry and the State Government of Victoria ratified The Live Music Accord 2010. The SLAM Rally also helped expedite government funding for Music Victoria, an umbrella organization for all music groups in the state, which had been launched before the rally, in January 2010.

"There's a great sense of community in Melbourne between the various elements of the music industry that has evolved quite naturally," says Ian James, Managing Director, Mushroom Music Publishing. He considers this essential for any successful Music City. "It can be encouraged over time, but people have to have the will to do it. However, once you've got it, it is a very rare and precious commodity."



Opportunity as a Catalyst for Engagement

In the absence of a catalytic event, it is still possible to get the broader music community engaged in a Music City initiative. This can be led by an organization within the music community like Austin Music People, Music Victoria, UK Music or Music Canada, for example. In other cases, governments lead this effort as they realize the value of consensus and are driven by goals to increase the economic, societal and/or cultural benefits of an industry.

In cities including Adelaide, Chicago, Bogotá and Kitchener, Canada, initiatives to bring the community together in order to identify common challenges and opportunities have been led by city officials and elected officeholders.

When the Premier of South Australia identified music as one of the state's key economic drivers, he directed government departments to look at music as an industry for the first time. It was under Premier Jay Weatherill's direction that UK Promoter Martin Elbourne was engaged to study the industry and that Musitec was created to build collaboration in the music community in order to increase jobs and new economic opportunities. "The problem with South Australian music is that we've never really worked together," says David Grice, Managing Director of Musitec. "So we're running workshops and events to build a sense of community around the musicians because we can't develop a spirit of collaboration if people don't know each other."

In Chicago, one of the key responsibilities of the city's Department of Cultural Affairs and Special Events (DCASE) is to "convene the industry" and "create forums for industry experts to interact and address shared goals."⁶⁸ Dylan Rice, Chicago's Director of Creative Industries – Music, says that the

"city is working to break down barriers between the different components of the industry (recording, live performance etc.), and genres of the industry, with the rationale that a more unified music community will strengthen the city's efforts to attract business development and tourism." Rice's department does this by hosting events and conferences including Lake FX Summit & Expo, Chicago Music Summit, Creative Industries Spotlight, and ChicagoMade at SXSW.

In Bogotá, music was identified as a key asset for marketing the city to Latin America and beyond, as a destination for tourism, immigration and investment. Bogotá is brimming with music and culture, however the music community itself is very fragmented. According to Juan Luis Restrepo in the city's Department of Culture, Recreation and Sport, when the city applied for UNESCO City of Music designation, it was expected "to get the music sector to work together and to develop a greater appreciation for city projects." Many private sector organizations are involved as well in trying to create greater connections in the music community. The Bogotá Chamber of Commerce, for example, organizes Bogotá Music Market (BoMM), an annual conference and showcase event.

In Canada, the City of Kitchener organized a grass-roots facilitation to strengthen the city's music scene. This involved 130 community members, including general audience members, musicians and those directly involved in the business of making music, and venue owners. Together, they focused on three general outcomes: expanding the audience; growing the music business; and enabling live commercial music venues to thrive.⁶⁹ The resulting strategy, Music Works, continues to drive the city's music program today.

“We can’t expect government to understand our unique issues... the sector must present a coherent position and message that government can understand.”

– Focus group participant

EFFECTIVE COLLABORATION DELIVERS RESULTS

Building consensus and broad support in the music community can lead to impressive results.

“Stuff doesn’t just happen,” says Austin’s Bobby Garza of Transmission Events. “It happens when there’s a groundswell of support.”

The results achieved by SLAM in Melbourne, and by the Music Industry Coalition in Nashville demonstrate the power of broad-based support and collaboration (see Chapter V.1).

Garza cites music community organization as the catalyst for the creation of Austin’s Music Division, while Austin Music People’s Jennifer Houlihan credits music community engagement in part for the decision to allow Uber to operate its mobile app-driven ride sharing service in Austin in order to provide patrons with another safe way home.

In Toronto, notes Music Canada President Graham Henderson, music community collaboration led



Photo Credit: Coalition Music

to the creation of the Toronto Music Advisory Council and the creation of the city's Music Sector Development officer position, as well as a provincial Live Music Strategy and an unprecedented CDN\$45mn grant program for the music industry called the Ontario Music Fund.

In cities where there is resistance to change, political champions – mayors, councillors or leaders of higher levels of government – have often been instrumental in creating the impetus for positive improvement.

Political champions can come from any part of the political spectrum. In South Australia, for example, the first effort to increase the long stagnant support

for the music industry came from a member of the Green Party. But it was Premier Jay Wilson of the Labor Party who influenced the more recent changes.

Cultivating positive relationships with elected officials is essential if success is to be achieved.

On the flip side, if there is no consensus and collaboration in the music community, it is inevitably harder for governments to understand the unique challenges faced by the sector, and governments will be far less motivated to make positive changes. A divided community discourages political action because policy decisions are unlikely to receive clear and broad support from the people affected.

RECOMMENDATIONS

1. Create opportunities for networking, mentoring and education in order to build relationships and trust within the music community.
2. Seek consensus on common issues that will deliver broad benefits across the sector.
3. Address issues of conflict and competition behind closed doors in order to present a united front.
4. When crisis occurs, use the situation to build support for sustainable music advocacy organizations and sustained engagement.
5. Develop strong relationships with elected officials at all levels of government, and of all political stripes to help overcome bureaucratic inertia.



SECTION V.5
SPACES AND PLACES:
WHERE THE MUSIC
HAPPENS

Music needs a home. Or in the context of a Music City, it needs many homes: rehearsal spaces, recording studios, music education institutions and live performance venues.

The latter must span a broad range of types: indoor and outdoor, small, medium and large; formal and informal. Shabby basements where budding artists get a start. Massive concert halls filled to capacity by international superstars. Parks used to host music festivals. These and other places are where artists connect with music fans. They are the places where musical talent is developed and music is created, perfected and recorded.

Quantity and variety of spaces are important, but so too is quality. The great live music that draws audiences requires great sound. This is not to say that a venue needs to be an aesthetic showpiece. As Music Canada's Graham Henderson notes, "For the live artist starting out, you need a place to play – grungy, basement places, and places of ascending size, creating what I like to call a stairway to heaven." But whatever the appearance of a venue, it should have good sound.

In the most advanced Music Cities, such spaces and places form a large and complex music ecosystem where music can flourish and artists can grow. Often, there is an "organic" aspect to the development of a rich ecosystem. Music venues and their patrons tend to cluster on certain streets and in specific districts. The infrastructure, expertise and artists that nurture one recording studio can spawn others. More importantly, however, are the policies and programs initiated by both the public and private sectors. These policies and programs are important or even essential to protect existing music spaces and create new ones.

Municipal government policy steers property development, land use and bylaws affecting a building's use. It is also the means used in most cities to make affordable housing available, which can benefit artist entrepreneurs. As such, some of the key, policy-related issues identified in this section are explored in further detail in section V. 1 of this report.

TAKING STOCK

When considering strategies to enhance and expand a Music City's spaces and places, a logical first step is to take inventory. How many rehearsal spaces are available? Are there enough recording studios at different price points? Are there record labels, management companies, agencies and other music businesses that are critical parts of the music economy? How many live venues are there? How many are mainly music-focused, and how many treat music as a secondary concern? Are the venues high quality? Do they span a full range of sizes and genres? The need to get answers to these questions – to take inventory – was recognized by the City of Melbourne, Australia in its 2014 Melbourne Music Strategy. The report recommends that the city "Conduct an audit that identifies existing and new spaces that support music performance, collaboration and rehearsal."

Beyond Buildings

The Melbourne Music Strategy recognizes that spaces and places need not be made of bricks and mortar, music is also performed in the streets and parks as a "part of everyday life." [Melbourne Music Strategy] The report elaborates:

Music will be a centrepiece of life in Melbourne. Musicians of all cultural backgrounds and genres will be a common sight in the streets

and at outdoor/indoor venues, and people will know where to go to hear live music during the day and at night. Having ready access to live music will increase community pride and wellbeing, and make Melbourne a more welcoming, vibrant 24 hour city for residents and visitors.

In Toronto, the head of the city's Downtown Yonge BIA (Business Improvement Area) in Toronto also views the street as a place for music. The BIA plans to revitalize the role music plays in this section of the city through music programming, guided walking tours about music history, and infrastructure and space development. According to a Nov. 28, 2014 story in Toronto's Globe and Mail, BIA Executive Director Mark Garner sees Yonge Street – a roadway in the heart of the city – as “about both fancy restaurants and buskers, and populated by social agencies as well as students.”⁷⁰

The Venue Ladder

To support a thriving music community in which artists can get a start, develop their talent and

then shoot for the stars requires a full range of live venues, from tiny clubs to large stadiums, and everything in-between. This continuum of venues, where artists have a place to play at every stage of their careers, has been called the “venue ladder.” Ideally, a Music City will have one or more venues for every step up the ladder.

Andrew Vincent, a singer-songwriter in Canada's capital city, Ottawa, describes the benefits of having a range of venues: “It brings a range of artists to the city. There are a lot of touring artists that can fill a 500-person general admission room but can't do a 1000. By having that range, it brings bands at certain levels where they are big enough to have generated an audience, but are still at the development stage, which can be really inspiring for local musicians. It also strengthens connections between the local scene and national booking agents.” Noting that some music fans might not go to smaller clubs, Vincent also sees the venue ladder as a way for artists to reach a broader audience.

A major challenge for Ottawa's music community is gaps in its own venue ladder. Vincent remarks, “Ottawa seems like a great place to get started in music. There are lots of places with open mic nights, small venues where you can get gigs, there are studios where you can record that are affordable, you can get spots opening at some festivals. But where the city is lacking is in the development potential between the smaller scale and the larger scale. We don't have the medium sized venues.”

Gaps like this are not uncommon, even in larger Music Cities. Toronto, for example, lacks a 5,000 seat arena – an important stepping stone for artists eyeing the biggest stages. Helsinki is missing a 3,000 seat facility although there are plans for one as part of a proposed new home for the live music association, according to Cultural Director Stuba

“The places are critical. Artists and their fans need easy access to an eclectic range of sites and venues, from intimate to world class.”

Graham Henderson, Music Canada, Toronto

Nikula. Other communities invest heavily in large, premium venues that host leading international acts, but budding local artists have few or no options where they can cut their teeth.

Filling these gaps doesn't always require completely new builds. Some communities have found innovative ways to renovate shuttered movie theatres, churches and other buildings that are no longer active in their original form.

Downtown Clusters and Suburban Hubs

There is wide agreement that, when it comes to music, there is strength in numbers. Neighbourhoods with a variety of labels, management companies and the like, develop a creative synergy. Clusters of venues along streets or in districts attract larger audiences. Among other music industry professionals, UK music promoter Martin Elbourne asserts that venues and audiences should be clustered first and foremost in the downtown core. "If you're trying to create a vibrant city, keep your musicians and your audience in the city," Elbourne says. "Everyone talks about clusters because they work."

Elbourne, author of the Reverb Report, which provided a roadmap for the South Australian Government to better support music development, advocates making the centre strong first, and only then looking at opportunities to establish music venues in the suburbs.

Toronto is fortunate to have strong music clusters in its downtown core. As a next step, Mike Tanner, the City of Toronto's Music Sector Development Officer, eyes the development of suburban music hubs so that audiences no longer have to travel across the city to enjoy live music.

Emmanuelle Hébert, an official with the City of Montreal's Department of Culture, says venues are beginning to pop up in suburban areas of her city. She notes that it is getting harder to bring people back downtown in the evening to enjoy live music. As newer venues in the boroughs are often programming similar shows, this new dynamic creates new challenges for city-based venues.

Development outside of the central core has been identified in Paris, France as an opportunity to revive a once-vibrant nightlife and music scene that has suffered under the weight of restrictive rules. An article in France 24 listed the reasons for this: "laws restricting opening hours, a lack of reliable transportation for night-time revellers and, especially, authorities forcing punitive temporary closures of venues following complaints by neighbours."⁷¹

Some Parisians, the article says, believe that part of the solution lies in drawing more nightlife to the suburbs. Indeed, spreading music activity throughout Paris is a stated priority of the city government's music policies. Publicist Eric Labbé told France 24, "We can no longer conceive of Paris nightlife as exclusively within the city, which is the size of a postage stamp. In order to compete with cities like London or Berlin, we need to be the same size – which means Paris plus its surrounding areas." However, improvements to public transport – a function of government policy – are needed to make this achievable.

CHALLENGE: IS THE ECONOMIC MODEL OF SMALL VENUES BROKEN?

The precipitous decline in the number of small music venues in London, UK has raised alarm bells among the city's music community. As noted in



the section V. 1 above, the number of small clubs in London has dropped by one-quarter in just five years, from about 400 in 2010 to 340 today. In response, live music venues have banded together to form the Music Venues Alliance, a new trade body aimed at protecting live music venues in the UK.

In a February 2, 2015 announcement, the Music Venues Trust called the Music Venues Alliance “the first significant response to the recent ICMP (Institute of Contemporary Music Performance) summary report ‘Understanding Small Venues’, which painted a picture of a UK live music venue circuit that is in a perilous and precarious state, facing an uncertain future at real risk despite the passion of the people involved in it.”⁷²

Slumping venue profit is the major reason for the decline, says Music Venue Trust CEO Mark Davyd. Squeezed disposable incomes, expensive noise abatement requirements, rising rents and other factors are behind this. “It’s not likely that we can run a small music venue as profitably as a pizza venue,” Davyd says.

Despite this daunting challenge, there is a sense of mission behind the Alliance’s work. In a Jan. 21, 2015 Music Week article on the Alliance, Davyd remarked, “It is important to emphasize the role that these small venues play in the ecosystem of British music, providing the first performance platform for writers and musicians. This is the grassroots and bedrock of the UK music industry which creates thousands of jobs and is one of our biggest export earners. These venues are the research and development department of that success.”⁷³

The City of London, along with music associations representing live and recorded music, have all voiced support for the Alliance. In March 2015, the Mayor of London’s Music Venues Taskforce was formed, with Mark Davyd as Chair.

MUSIC HUBS AND ACCELERATORS

While music spaces are struggling in some cities, in other cities the public and private sectors are working both separately and together to build new opportunities for artists and music businesses. The offices of major labels in Toronto, for instance, provide space for some of the independent labels with which they have distribution and marketing deals, providing an ideal way to share know-how and “apprentice” indie label company executives. Music hubs and accelerators are emerging in a number of forms in cities around the world.

Nashville's Project Music

Project Music is a new music tech accelerator created in partnership with the Nashville Entrepreneur Center and the Country Music Association, in association with members of the Music City Music Council. The program began in January 2015 with eight start-up companies receiving US\$30,000 in seed money in exchange for 10 percent equity in the company. Google, Digital Entertainment Ventures and other high profile music and entertainment companies are sponsoring the program.⁷⁴

Adelaide's St Paul's Creative Centre

St Paul's is a creative industries hub in the heart of Adelaide's Central Business District. St Paul's is a 150 year old church which was also a former night club and function centre. This centre is now home to more than 15 music companies, including a registered training institute, South Australia's leading music industry body, Music SA, the state government's Music Development Office, and Musitec, which coordinates the centre. Musitec encourages emerging businesses to locate in St Paul's, occupy “hot desks”, and book shared meeting spaces and function rooms.

Chicago's Fort Knox Studios

Fort Knox is a Chicago recording studio offering shared rehearsal space and 92 recording suites in a more than 130,000 square foot facility. The privately owned and operated facility, which first opened in 2009, attracts as many as 200 musicians per day. Fort Knox is all about collaboration, connecting music industry professionals – sound and lighting crews, website developers, photographers and others – with talent. Just as importantly, it offers relatively low costs, made possible by sharing space.⁷⁵

The City of Chicago's Live Music Strategy: Creating Music Hubs

The City of Chicago has developed a live music strategy that focuses on cultivating music hubs and districts in different neighbourhoods. The approach identifies specific “scenes” or key venues in target neighbourhoods, and uses them as catalysts to create a music hub in the area, according to Dylan Rice, Director of Creative Industries – Music, in Chicago's Department of Cultural Affairs and Special Events.

Each music hub comprises a destination – venues, music school, etc. – efficient transportation links and features such as restaurants and bars. The destination is mapped out, and tools and resources are provided to entrepreneurs to show them where the opportunities are, and how to make use of them. For instance, Rice recently drafted the city's first Venue Licensing Toolkit as a centralized roadmap to help start-ups navigate the licence application process and ultimately streamline it.

The approach is based on successful existing hubs, among them the Old Town School of Folk Music in Chicago's Lincoln Square area, which the city seeks to replicate elsewhere.

CASE STUDY: MEMPHIS MUSIC MAGNET

Memphis Music Magnet is an innovative, arts-based neighbourhood revitalization project designed “to make Soulsville USA a community of choice for musicians and other creatives,” according to Tsedey Betru, Vice President, Community LIFT. As it develops, it aims to provide:

- Targeted homeownership incentives and housing programs;
- Place-based neighborhood amenities achieved through the restoration and reuse of empty, but historically significant, buildings; and
- Programmatic community enhancements to attract activity to the neighborhood.

In 2012, Memphis Music Magnet acquired the birth home of the late, great blues pianist Memphis Slim. The property has been developed into the

Memphis Slim Collaboratory (commonly referred to as “Slim House”) with high-quality rehearsal spaces and recording facilities. It is a membership-based facility designed to incent emerging artists from the region to take up residency in the neighbourhood. For just US\$75/year, members are entitled to eight hours of studio time each month with a professional sound engineer. The initiative includes plans to create artist residency opportunities at Slim House as well. The goal is to secure 50 members by the end of this year and 100 by the end of 2016.

“Having strong partnerships with city leaders and other organizations making investments in the neighborhood is a necessary pre-condition to successful redevelopment,” says Betru, adding that once one cultural project is underway, she is confident it will stimulate many others.



BEFORE



AFTER



MUSIC EDUCATION INSTITUTIONS AND PROGRAMMING

Music education is an important component of Music Cities, as noted in the Key Elements section. Whether at the primary, secondary or post-secondary levels, music education provides a wide range of benefits. For this reason, music education spaces are another significant part of a Music City's infrastructure.

Some countries and cities, recognizing the benefits, place considerable emphasis on music education. Sweden's commitment in this area is often held up as a model for other countries. The city provides music programs to school children of all ages, according to Michael Blair of Stockholm's The House of Songs and Scorpio Music Production.


Municipalities and states in Finland also have a strong tradition of funding music education for

children and young people. Helsinki's Cultural Director, Stuba Nikula, explains that it is "in their DNA" to enrol Finnish children in music training, mostly in the classical tradition. This musical foundation helps raise the quality of the pop and rock scene as well, Nikula says. "The punk bands here don't sound like shit, because they know how to tune their instruments!" he remarks.

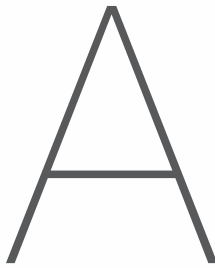
Music education has received renewed focus under the current political leadership in Bogotá. Juan Luis Restrepo explains that 20 years ago, arts education ceased to be a compulsory area in individual schools' curriculum, resulting in the loss of a large number of music and art teachers in public schools. Mayor Gustavo Francisco Petro Urrego made it a priority to put music and arts back into public education. Thanks to this policy, today 100,000 students in public schools study music. Post-secondary music education has also blossomed in the past few decades, from two programs in the 1980s to 11 today.

RECOMMENDATIONS

1. Conduct an inventory of existing rehearsal spaces, recording studios and live music venues, noting their capacity, primary uses, licensing conditions, cost to access, quality of sound and lighting, and accessibility to transportation and parking.
2. Based on the inventory, identify gaps in the venue ladder and other spaces and identify potential public and private partners, as well as underutilized buildings that may be repurposed to fill the gaps identified.
3. Clusters, hubs and accelerators in their many forms can make efficient use of resources and expertise, while establishing an environment where artists are nurtured and respected. Investigate the opportunity for projects in your community.

The background features a soft, abstract watercolor wash in shades of teal, pink, and yellow. A double-line border, with the inner line in purple and the outer line in green, frames the central text.

SECTION V.6
AUDIENCE
DEVELOPMENT:
BUILDING THE
FAN BASE



receptive and engaged audience is essential to a Music City's success. The audience is inextricably linked to the diversity and depth of the music being created and the quality of the places where it is performed.

Don Pitts, Austin's Music Program Manager, gives the audience equal billing with government and industry for his city's music success: "Austin's renown as a Music City can be attributed to the efforts of a diligent music industry, a responsive local government and a supportive community of music patrons. All parts have contributed."

A variety of factors affect the development of a receptive and engaged audience. Section V.1 addresses some of these factors including government policies around hours of operation, venue licensing, liquor licensing and land use planning such as, designated cultural zones. Other key factors are outlined below.

Engaging Youth

Cities such as Toronto, Adelaide, Austin and Berlin point to their large student populations as helpful factors in generating engaged audiences. A recently released strategy for music in Alberta,

Canada cited the "young, affluent audience" and the "highest per capita cultural spending" in Canada, as a key advantage.⁷⁶

Audience development must begin long before young people reach university age. Tomorrow's music fans are developing their entertainment tastes today. Stuba Nikula, Helsinki's Cultural Director, remarks on the consequences of the failure of his country's music industry to keep up with young people's changing entertainment preferences: "The biggest challenge in Helsinki is the lack of teenagers who are interested in live music. Kids are using their time and money somewhere else." In Helsinki's case, Nikula suggests that the scarcity of all-ages events is a contributing factor.

Martin Elbourne confronted this issue in the Reverb Report with a recommendation for the subsidization of under-age events. He explains that under-age shows are often not profitable for promoters and venues because they don't generate alcohol sales. Therefore, there is less incentive to produce shows for a younger audience.

The payoff from exposing young people to music cannot be underestimated, Elbourne says. "Seeing great bands ... in a great venue helps get youth excited about live music and makes it more likely

"Austin is a university town, making the average age in Austin (relatively) low. Those people are more likely to go out and enjoy music."

Jennifer Houlihan, Austin Music People, Austin



that they will have a lifetime of engagement with music and potentially the broader industry.”⁷⁷

In response to Elbourne’s report, Adelaide’s 2014-16 Live Music Action Plan contains several recommendations aimed at supporting audience development. The recommendations largely focus on featuring South Australian artists at city events and festivals. Although it stops short of advocating the subsidization of all-ages events, the Action Plan recommends tying the Live Music Strategy into funding from sponsorship, grants and community development programs.⁷⁸

Music education programs also help to create a lifelong relationship with music, as described in the previous chapter.

ACCESS

Audiences need easy access to live music events. Beyond the availability of a range of events, which has been addressed previously in this report, music fans must also have access to information on the events taking place, and convenient ways to get to and from them.

Promotion

Andrew Vincent, a musician in Ottawa and author of *Connecting Ottawa Music*, points to the absence of a weekly local publication listing music events as a major challenge for his city’s music community. Bogotá faces a similar problem, according to Juan Luis Restrepo of the City’s Department of Culture, Recreation and Sports. “With music, you never know what is happening,” Restrepo says. “You have to swim underwater a little to find information from social networks.” To address this problem, Bogotá’s Arts Institute has developed a website to coordinate online promotion of live music.

Music Cities are increasingly utilizing social media and mobile apps to connect fans with local music. Cities such as Nashville, Austin and Melbourne provide free mobile apps for accessing live music-related information including concert calendars, venue locations and in some cases, music-friendly accommodations. In Canada, the province of Ontario, as part of a Live Music Strategy, has funded the creation of a live music portal⁷⁹ and app for all live music events of every genre. These apps are also promoted by tourism agencies so that music tourists can plan their visit before leaving home.

Attracting the attention of the world's press is often identified as key to audience development. In Gothenburg, Sweden, journalists from around the world are invited to attend – and report on – larger events and festivals. Stockholm has leveraged the Polar Music Prize to gain worldwide media attention as a leading Music City, according to House of Songs/Scorpio Music Production's Michael Blair. "The Polar Music Prize ... has grown to become the most prestigious music award in the world. In addition to the main ceremony in Stockholm in June, there will be an event soon in New York discussing the role of Sweden with international music successes. These events have attracted media around the world and focus on Stockholm's position as a major music city."

Transportation

The ease of getting to and from venues is also critical to audience development. This relates directly to the larger infrastructure and transportation issues discussed earlier in this report. In places such as Birmingham, according to Tom Kiehl of UK Music, it is difficult for the city's large student population to attend music events. Getting to the gig at 7 p.m. is easy. However, buses don't run late enough for concert-goers to return home when the event wraps up.

The benefits of expanding the availability of convenient, accessible transportation alternatives is why Austin Music People lobbied the city in support of Uber, the fast-growing mobile app-based ride sharing service, as well as other transportation networking companies. Knowing that Uber has come into conflict with traditional taxi services and existing taxi regulations in many cities, Austin Music People spoke up to help it gain City Hall's approval. Live Nation, the world's largest promoter, has a strategic partnership with Uber to provide fast and efficient transportation for concert patrons. As reported in Digital Trends, Uber pick-up and drop-off zones will be available at participating Live Nation venues.⁸⁰

In Australia, Music Victoria includes safe transportation in its Best Practice Live Music Guidelines. The guidelines provide venue owners and promoters with information about public transit and taxis, and underlines their responsibility for their patrons' safety.⁸¹

On a larger scale, easy access by air travel is important to establishing a Music City as a destination for touring artists as well as music tourists. London's Heathrow Airport recently identified the volume of travel by artists, who transport 90% of their equipment on regularly scheduled commercial flights, as an argument for airport expansion.⁸²

The airports in Austin, Melbourne and Seattle are not only transportation hubs, but are also literally music hubs. In each of these airports, local musicians perform in front of audiences of national and international travellers as they pass through. In Seattle alone, the trial program generated US\$259,000 for the artists from wages, tips and merchandise. The program's success guaranteed its continuation for another three years.

Seattle's airport even permitted the opening of an independent label-run record store.⁸³

Proximity to Other Markets

Silvia Di Donato, Kitchener's Manager of Arts and Culture, acknowledges that Kitchener's close proximity to Toronto, which offers entertainment options on an international scale, poses a challenge for her audience development in her city. For local audiences, those options are easily accessed. The flip side is that a medium-sized city like Kitchener offers affordability and a high quality of life to artists who are starting and expanding their careers, says Di Donato. The city is taking action to drive its live music sector and support local audience development through its "Music Works" strategy, which supports large scale music festivals and emerging artist events.

Proximity to other Music Cities can also be helpful, as it creates the opportunity for a touring circuit. Helsinki's Nikula Stuba points out that Helsinki is a three-day detour for touring artists unless bands stop in Finland on the way to or from Russia. However, he expects that current geopolitical events undermining Russia's attractiveness as a touring destination are likely to have a negative impact on his city.

CHALLENGE: DEVELOPING AUDIENCE APPRECIATION FOR LOCAL PERFORMERS

Cities as far afield as Stockholm, Kuala Lumpur, Adelaide and Johannesburg cite challenges gaining

audience support for local artists. It can be hard for lesser-known, homegrown talent to get attention in an interconnected, media-saturated world where global superstars dominate the airwaves. Stockholm's Michael Blair explains that local consumers there are "super mega-trend conscious and show a lack of enthusiasm for unknown acts and artists."

South Africa faces a similar problem, according to Andre Le Roux, Managing Director of SAMRO Foundation. "The stadiums are for international artists, and people will pay big money. But for small venues with South African artists, it's hard to get people to pay. We need to start building a local music culture."

In response to these challenges, SAMRO Foundation has launched Concerts SA in partnership with the Norwegian Ministry of Foreign Affairs. Concerts SA is an innovative initiative that brings music showcases and workshops to schools and venues in rural areas, creating opportunities for artists and building long-term audience development by focusing on youth. Students in rural South Africa have typically never even seen music instruments before, says Le Roux.

Concerts SA also subsidizes 23 venues in three large cities and smaller centres as part of the program to develop sustainable performance spaces, thereby fuelling both audience and artist development.



Sansikane Primary School, Kwa-Zulu Natal, Photo Credit: Vulane Mthembu



WorldMusic Event, King Kong, Johannesburg, Photo Credit: Christine Msibi

CASE STUDY: MALAYSIA

While Kuala Lumpur has a strong small club music scene featuring local artists, most of the music they play is cover tunes of foreign superstars. This reflects the reality that local audiences want to hear the familiar songs played on radio and the Internet; that means top global hits from the U.S., Europe and other, mainly Western, nations.

"For foreign artists, audiences here will pay \$300, but for local artists they have a problem paying \$30," says Norman Abdul Halim, Executive President, KRU Studios, Cyberjaya, Malaysia. Moreover, many Malaysian artists today produce a limited number of singles, and therefore don't have enough repertoire to put on a show with their own music only – further limiting audience development for local music.

Inevitably, artists fall into line with audience demand for the hits.

Compounding this challenge is religious conservatism, especially in rural areas, that results in the barring of a few foreign artists from performing in Malaysia. This channels even more audience attention to shows by the big-name foreign artists who are permitted to play.

"We have a very open policy on the Internet and people here are exposed to foreign movies, TV and music," Halim says. "The challenge is to get public acceptance for what goes on stage especially in the East Coast of Malaysia."

AIM21, Malaysia, Performers: Haiza, Ramlah Ram, Sheeda, Photo Credit: Recording Industry Association of Malaysia



RECOMMENDATIONS

1. Live music strategies should include specific goals to expand access to all ages events and facilities.
2. Joint marketing of live music events should be coordinated by music associations, cities or tourism agencies, to ensure information on the full breadth of available options is available to music fans.
3. Transportation planning must take into account the "night economy" in order to facilitate access both to and from live music events. The importance of international travel should also be considered when planning for airports and routes.
4. Artist mobility should be enhanced in order to expose remote or segregated communities to a variety of music for its social and cultural benefits.

Way out West festival, Gothenburg, Photo Credit: Beatrice Tornros



The background is a soft, abstract watercolor wash in shades of light blue, teal, yellow, and pink. A double-line border, with the inner line in red and the outer line in green, frames the central text.

SECTION V.7
MUSIC TOURISM:
CREATES
BONUS TRACKS

The worldwide growth in tourism has spawned intensified competition for tourist dollars. More and more cities are leveraging their music scene to draw visitors and the economic benefits they bring.

The benefits of music tourism are outlined in section IV of this report. In summary, the main benefits are:

- Revenue from concert and festival tickets, merchandise, hotels, restaurants, and other spinoffs;
- Job creation – hotels, restaurants, venues and other places where tourists spend money need staff to meet the demand; and
- Building a city's brand by leveraging its musical heritage or music scene.

INVENTORY OF A CITY'S MUSIC TOURISM ASSETS

The first step in developing a music tourism strategy is to identify a city's unique music assets. These may include music heritage, a live music scene and/or festivals:

Music heritage sites such as Memphis's Graceland and The Beatles' homes in Liverpool can be major tourist draws;

- Live music venues can attract large numbers of visitors throughout the year. Cities with the most vibrant music scenes, from small local clubs to huge concerts, get on the radar of music fans. Helsinki, Finland, for example, offers about 10 different live music events on

any given day, says the city's Cultural Director, Stuba Nikula. Melbourne, with 370 hotels, bars, nightclubs and restaurants featuring live music, is a magnet for music fans;⁸⁴

- Music festivals such as Bogotá, Colombia's "Rock al Parque," Austin, Texas's SXSW, Indio, California's Coachella, Barcelona's Sonar and Budapest's Sziget are go-to events for many thousands of visitors, many from distant countries.

CHALLENGES TO DEVELOPING MUSIC TOURISM

Measurement

More needs to be done to carve out the impact of commercial music within tourism data. Commercial music statistics are typically not distinguished from the general arts, culture and leisure sectors, making it difficult to make the case for music tourism promotion and to develop well-targeted strategies. Yet, cultural tourists have been found to stay longer and spend more than other tourists, making them a lucrative target group.⁸⁵ In recent years, the UK has been at the forefront of reporting the impact of music tourism on its economy. With this data, the UK has been able to identify gaps and create opportunities to encourage further tourism-related economic development. In the UK Music report, "Imagine", it was estimated that music heritage alone could be worth more than £4bn if more cities matched Liverpool's performance.⁸⁶ Both Melbourne and Austin have also measured the tourism impact of commercial music on their communities and have used this information to successfully advocate for favourable policy reforms for live music venues.

Authenticity

One of the key challenges with music tourism is ensuring that commercial promotion of a city's musical assets does not devalue those assets by making them appear contrived or inauthentic. Music scenes are rooted in artists, and much of their attraction stems from that. Inappropriate use of music as a promotional tool can erode that perception. Conversely, successful tourism strategies build on an authentic product, whether music or otherwise. Lutz Leichsenring of Berlin's Clubcommission notes that music is one of the most important industries in Berlin, in part because it drives tourism. Yet, until recently there was very little engagement of the music industry by tourism agencies. "Tourism marketing people were selling the music scene without talking to the people within it," Leichsenring says. Recently, however, representatives from the music industry were invited to help influence the direction of a film screening about Berlin's club scene in São Paulo, Brazil. This resulted in a more authentic product, according to Leichsenring.

Gentrification

Gentrification is one of the biggest threats to music tourism. A growing urban population puts pressure on land use planning, as has been described in other chapters. In many areas, redevelopment has led to the closure of iconic venues – even some world famous ones – that draw tourists. This has a two-fold negative impact. First, it threatens to eliminate key differentiators that help a city stand out. Second, it reduces the spaces available for performance, impacting the overall level of live music activity.

MUSIC TOURISM OPPORTUNITIES

Multi-City Alliances

Some cities have joined together in strategic partnerships to create opportunities to promote music tourism. Cologne and Istanbul have had a longstanding alliance that recently added music to its mandate. In 2014, the two cities held electronic music festivals that featured musicians from both places. A pair of cities steeped in musical heritage, Memphis and Liverpool, became sister cities in 2004. Since then the cities have mounted co-curated exhibitions featuring their music icons. For example, "Elvis and Us" chronicled the impact of Elvis and The Beatles on contemporary music, as well as the day the artists met in 1965. The exhibition ran for three years, until August 2014, and attracted well over 150,000 visitors.

Branding Initiatives

One of the key opportunities for music tourism is the development of an authentic music brand that helps put a city on the tourist map. In Bogotá, the City of Music began as a branding exercise, notes Juan Luis Restrepo of the city's Department of Culture, Recreation and Sport. This came about when the marketing company charged with identifying Bogotá's story pointed out that Bogotá is a city of music and culture.

A handful of cities specifically express their music story through a brand. Memphis's tourism website proclaims the city as "The Home of Rock n' Roll/ Birthplace of the Blues"; the city is also known

Key Elements, Effective Strategies and Why it's Worth Pursuing

as "Soulsville USA," based on legendary soul music studio, Stax Records. Music leaders have initiated branding in Melbourne⁸⁷ and Toronto⁸⁸ with Melbourne Music City and 4479 Toronto respectively.

Few cities have leveraged their music branding to draw tourists as effectively as Austin, the self-proclaimed "Live Music Capital of the World." The Austin Convention and Visitor's Bureau (ACVB) has consistently marketed the city's unique cultural brand for over 20 years, using innovative programs. As an example, the ACVB Music & Film office actively markets Austin as a convention destination based on its live music scene, taking musicians on the road to land new convention business,

producing compilations, and programming music for conventions. The Bureau produces in-depth information on the city's music scene with branded radio stations, TV and social media highlighting local musicians. The city is also well-known among music fans worldwide for producing some of the world's largest and best-known music festivals and offers year-round shows in its 270 live music venues.

Melbourne and Seattle, like Austin, have launched music branding strategies in their airports where local musicians perform in front of national and international visitors. From virtually the moment visitors step off their plane, music is placed front and centre before them.



Fun Fun Fun Fest, Austin, Texas,
Photo Credit: Jackie Lee Young

CASE STUDY: NASHVILLE

In 2014, Nashville – “Music City” – welcomed more than 13mn visitors who contributed over US\$5bn in revenue and supported 50,000 jobs.⁸⁹ The name “music city” was coined in the 1800s by the Queen of England and today is reinforced by the city’s Brand Promise: “The Promise of Nashville, where the music is inspired, created, recorded and performed, is to provide the ultimate musical entertainment experience, celebrated throughout our diverse cultural and entertainment offerings, and presented in an authentic, unique, friendly and unpretentious atmosphere.”

The campaign has been strongly supported by the Convention and Visitors Corporation, which uses the city’s music note logo on buildings such as the visitor centre and convention center, souvenir items and promotional materials.⁹⁰ In addition, coloured guitar pick signs, which have been featured on national television programs such as *The Voice* and *American Idol*, indicate different genres of music venues within the city. The city’s tourism website,

visitmusiccity.com, features a radio station with local artists and a wayfinding app for tourists connecting them to the live music scene. The Music City brand has also been featured overseas in a campaign that wrapped London taxis with the Music City logo.⁹¹

The Music City brand was further enhanced by the Tennessee Department of Tourist Development, which used it in a 2014 campaign to become a “Top 10 market among state destinations”. The campaign, called “Made in Tennessee”, featured TV commercials, online and prints ads, social media and a branded website extolling the “rich musical heritage, history and present day offerings.” The campaign was also linked to the TV show “Nashville,” which highlights local music and venues. The show’s popularity has garnered international interest in the city, with music at the forefront. The Made in Tennessee website leans heavily on music, featuring not only Nashville but also the Bonnaroo music festival and sites made famous by the Blues Trail outside of Memphis.⁹²

Left: Jack Daniel’s New Year’s Eve Bash on Broadway,
Lady Antebellum performing
Photos Credit: Nashville Convention & Visitors Corporation



RECOMMENDATIONS

1. Together, the music community, city and tourism officials should identify the available music tourism assets including music heritage sites, live venues and festivals, and initiate policies and programs that support their continued operation and growth.
2. A Music City brand should be developed with the involvement of tourism experts in conjunction with the local music community, in order to ensure its authenticity.
3. Music tourism should be defined as a distinct category in tourism impact studies, in order to better identify music-specific opportunities and challenges.

SUMMARY OF RECOMMENDATIONS:

Government Policy: Music-Friendly Policies

1. Government departments responsible for liquor licensing, business licensing and other public safety measures, should work with the music community to identify compliance issues that restrict business growth in an effort to identify mutually-beneficial solutions.
2. Transportation planning and parking zones should take into account the needs of existing and developing music business clusters for efficient access. This should include short-term, reserved parking spots for active loading and unloading.
3. Land use planning should take into account culturally significant sites and zones to protect their ongoing viability, recognizing that these are often the assets that make neighbourhoods attractive to additional investment. Developers should be required to take into account these existing sites as part of the planning process, coordinate their activities with all relevant city departments, and inform future purchasers about the presence of music venues and clusters.
4. Music communities should explore the viability of historical designation or cultural zone designation to bring awareness to the value of individual sites and zones.
5. The Agent of Change principle (see page 42) should be explored in areas where there is already a significant number of live music venues.

Government Policy: Musician-Friendly Policies

6. Conduct a needs assessment of your community of musicians, singers, songwriters and producers in order to identify policies that can help them succeed along with key challenges and obstacles to pursuing music as a vocation.
7. Inventory the music professionals and businesses available to support artists in their careers including managers, agents and labels.
8. Based on these assessments, identify the priority needs and opportunities. These may require financial support, infrastructure spending, training or programs in other areas.
9. Identify key public and private sector players who can help deliver programs to meet the identified needs and priorities.

Music Office or Officer

10. Establish a single point of contact – whether an individual or team – for the music industry within City Hall mandated to:
 - a. Help the music community navigate relevant city government departments and policies;
 - b. Lead the city's music strategy or lead the development of a strategy if one does not exist;
 - c. Liaise with the volunteer music advisory board or commission;
 - d. Help other city employees, agencies and elected officials understand the issues facing the music sector; and
 - e. Mediate between the music community and other community groups in order to resolve conflicts.
11. Music should be recognized as a commercial industry, and therefore the officer should be housed in a department focused on economic development.
12. Ensure the person hired as a music officer has direct experience in a creative industry, preferably music.
13. Engage the broader music community to continuously promote the importance of the music officer/office to ensure sustainability and continued funding.

Music Advisory Boards

14. Establish a music advisory board representing a cross-section of the music community and key decision makers in agencies that have an impact on music (e.g. tourism agencies).
15. Enlist the involvement of music industry representatives with larger networks to facilitate two-way communication with government.
16. Governments should utilize the music advisory board as a sounding board for legislation, policies and programs, providing members with ample opportunity to study the issues and engage their networks to provide feedback and ideas.

Engaging the Broader Music Community

17. Create opportunities for networking, mentoring and education in order to build relationships and trust within the music community.
18. Seek consensus on common issues that will deliver broad benefits across the sector.
19. Address issues of conflict and competition behind closed doors in order to present a united front; where consensus cannot be achieved on an issue, do not bring it forward.

20. When crisis occurs, use the situation to build support for sustainable music advocacy organizations and sustained engagement.

21. Develop strong relationships with elected officials at all levels of government, and of all political stripes to help overcome bureaucratic inertia.

Spaces and Places

22. Conduct an inventory of existing rehearsal spaces, recording studios and live music venues, noting their capacity, primary uses, licensing conditions, cost to access, quality of sound and lighting, and accessibility to transportation and parking.

23. Based on the inventory, identify gaps in the venue ladder and other music spaces, and identify potential public and private partners, as well as underutilized buildings that may be repurposed to fill the gaps identified.

24. Clusters, hubs and accelerators in their many forms can make efficient use of resources and expertise, while establishing an environment where artists are nurtured and respected. Investigate the opportunity for projects in your community.

Audience Development

25. Live music strategies should include specific goals to expand access to all ages events and facilities.

26. Joint marketing of live music events should be coordinated by music associations, cities or tourism agencies, to ensure information on the full breadth of available options is available music fans.

27. Transportation planning must take into account the night economy in order facilitate access both to and from live music events.

28. Artist mobility should be enhanced in order to expose remote or segregated communities to a variety of music for its social and cultural benefits.

Music Tourism

29. Together, the music community, city and tourism officials should identify the available music tourism assets including music heritage sites, live venues and festivals, and initiate policies and programs that support their continued operation and growth.

30. A Music City brand should be developed with the involvement of tourism experts in conjunction with the local music community, in order to ensure its authenticity.

31. Music tourism should be defined as a distinct category in tourism impact studies, in order to better identify music-specific opportunities and challenges.



The background is a soft, abstract watercolor wash in shades of light blue, pink, and yellow. A central rectangular box with a thin, multi-colored border (red, blue, green, yellow) contains the text. The text is in a clean, sans-serif font, with each letter colored to match the border. The word 'SECTION VI' is on the top line, and 'CONCLUSIONS' is on the bottom line.

SECTION VI CONCLUSIONS

There is growing recognition of music as a transformative power, not only as a cultural staple, but also as an economic driver for cities. The outsized impact of music on both the lifestyle and economic fortunes of places like Austin and Melbourne has become a beacon for other cities. Artists and businesses in the music industry, after more than a decade of difficult adjustment to the digital revolution, are eager to seize – and share – the opportunities.

Boosting the music economy brings multiple dividends to communities, from advancing artistic and cultural growth, to generating substantial economic impacts from job creation and music tourism spending, thereby increasing GDP. A vibrant music economy creates the quality of life that makes people want to live and work in a Music City, giving these communities an added edge in business attraction and retention.

The proven strategies outlined in this report can help communities of all sizes seize the opportunities offered by music. To do so, members of the music community, government and larger business community should all get involved. Together, they can develop a plan that builds on existing assets and overcomes areas of challenge and friction.

Music Cities around the world can also benefit by working together. During the research for this report, it became clear that there is a great deal of interest in sharing best practices. Reports like this one are intended to facilitate that, as are many of the music conferences that take place around the world. Similarly, there is an eagerness among music community members to share knowledge and build a dialogue – an aspiration that came to the forefront during focus groups for the report. With organization and a willing host, this could be facilitated on a larger scale.

This spirit of sharing and cooperation, in combination with well thought out strategies, gives hope that many more Seattles, Berlins and Bogotas – Music Cities – will take root all over the world.



SECTION VII
CREDITS

ABOUT THE AUTHORS

AMY TERRILL is Vice President Public Affairs at Music Canada where she is responsible for government relations, communications and public relations. Amy has been instrumental in Music Canada's efforts to unite a broad coalition of industry members in Ontario in a bid to promote live performance, music tourism and Toronto as a music city. She has also led the organization's research activities since 2010 which have included the publication of *The Next Big Bang – A New Direction for Music in Canada*, *Accelerating Toronto's Music Industry Growth - Leveraging Best Practices from Austin Texas*, *Fertile Ground - Alberta Music Cities Initiative and Economic Impact Analysis of the Sound Recording Industry in Canada*.

DON HOGARTH is a communications consultant with more than 20 years of experience in public relations and print journalism. Don has extensive consulting experience in the music industry, including with Music Canada. His work there has included contributions to several initiatives, among them copyright reform, the organization's rebranding, and the 2013 research report, *The Next Big Bang – A New Direction for Music in Canada*.

ALEX CLEMENT (Research Assistant) is a graduate of the University of Toronto's School of Public Policy and Governance. Alex has worked with Music Canada on their Music City initiatives and has been active in Music Canada's efforts to promote and recognize Toronto's potential as a Music City.

ROXANNE FRANCIS (Research Assistant) has worked in the Arts and Entertainment industry for most of her career. She is a graduate of the Music Business Management Program from the University of Westminster where she focused her studies on

Music and Tourism. A native of Toronto, Roxanne is passionate about the city and the diverse spectrum of music it has to offer.

Numerous community and music leaders from around the world made this report possible through a generous contribution of their time, ideas, insights and expertise. Below is a list of those individuals and their affiliations.

Norman Abdul Halim, KRU Studios, Malaysia

Kate Becker, Director, Office of Film and Music, City of Seattle

Tsedey Betru, Vice President, Community LIFT, Memphis

Michael Blair, The House of Songs and Scorpio Music Production, Stockholm

Hannah Brooks, Business Advisor, City of Melbourne

Jennifer Carlat, M.P.P, AICP Special Projects Director, Metro Nashville/Davidson County Planning Department

Bradley Collins, Senior Director Writer/Publisher Relations, Broadcast Music Inc. (BMI), Nashville

Damian Cunningham, Director, Live Music Office, Sydney

Mark Davyd, Music Venue Trust, United Kingdom

Silvia Di Donato, Manager, Arts and Culture, City of Kitchener

Gareth Donal Gordon, Bogotá Chamber of Commerce, Bogotá

Patrick Donovan, CEO, Music Victoria, Melbourne

Martin Elbourne, UK Music Promoter and Author of Reverb Report on City of Adelaide

The Mastering of a Music City

Bobby Garza, General Manager, Transmission Events, Austin

Mary MacDonald, Heritage Preservation Services, City of Toronto

Andrea Goetzke, Cultural Producer, Berlin

David Melo, Marketing Manager, Invest Bogotá

David Grice, Managing Director, Musitec, Adelaide

Miranda Mulholland, Musician, Toronto

Bill Harvey, co-founder, NY is Music, New York City

Chris R. Parham, Nashville Mayor's Office of Economic and Community Development

Emmanuelle Hébert, Department of Culture, City of Montreal

Don Pitts, Music Program Manager, City of Austin

Graham Henderson, Music Canada, Toronto

David Porter, President/Founder, The Consortium MMT, Memphis

Bart Herbison, Executive Director, Nashville Songwriters Association International, Nashville

Dylan Rice, Director of Creative Industries – Music, Department of Cultural Affairs and Special Events, City of Chicago

Jennifer Houlihan, Executive Director, Austin Music People, Austin

Shain Shapiro, Managing Director, Sound Diplomacy, London, UK

Ian James, Managing Director, Mushroom Music Publishing, Melbourne

Fredrik Sandsten, Event Manager Music, Göteborg&Co, Gothenburg

Till Kniola, Referent für Popkultur und Filmkultur (Pop and Film Culture Representative), Culture Department, City of Cologne

Butch Spyridon, President and CEO, Nashville Convention and Visitors Corporation, Nashville

Andre Le Roux, SAMRO Foundation, South Africa

Nikula Stuba, Cultural Director, City of Helsinki

Lutz Leichsenring, Clubcommission, Berlin

Mike Tanner, Music Sector Development Officer, City of Toronto

Tom Kiehl, Director of Government and Public Affairs, UK Music, London

Andrew Vincent, Musician, Ottawa

Hank Locklin, Senior Advisor of the Music and Entertainment Industry for the State of Tennessee, Tennessee Film, Entertainment and Music Commission, Nashville

Johnnie Walker, Executive Director, Memphis Music Commission

Katja Lucker, CEO, the Musicboard Berlin GmbH, Berlin

John Wardle, Director, Live Music Office, Sydney

Juan Luis Restrepo, Department of Culture, Recreation and Sport, City of Bogotá

Additionally, some of the above contributors participated in one of two international focus groups.

Focus Group 1 – February 2, 2015

Patrick Donovan, CEO, Music Victoria, Melbourne
David Grice, Managing Director, Musitec, Adelaide
Juan Luis Restrepo, Department of Culture,
Recreation and Sport, City of Bogotá
Butch Spyridon, President and CEO, Nashville
Convention and Visitors Corporation, Nashville
John Wardle, Director, Live Music Office, Sydney

Focus Group 2 – February 3, 2015

Silvia Di Donato, Manager, Arts and Culture, City of
Kitchener
Bobby Garza, General Manager, Transmission
Events, Austin
Graham Henderson, President, Music Canada,
Toronto
Jennifer Houlihan, Executive Director, Austin Music
People, Austin
Andre Le Roux, SAMRO Foundation, South Africa
Ignacio Priego, Concerts SA, South Africa
Shain Shapiro, Sound Diplomacy, United Kingdom
Andrea Goetzke, Cultural Producer, Berlin

The focus group sessions were led by consultant Erik Lockhart of Queen's University in Kingston, Canada to whom we are grateful for his moderation. Participants joined both sessions by phone and online. The focus groups helped verify our initial findings, identify gaps, and rank the following: the benefits accrued to cities with music-friendly and musician-friendly policies; the fundamental building blocks or assets for a music city; and, the most effective music strategies.

We wish to thank the many people who gave willingly of their time and ideas in the research for this report. The enthusiasm with which the focus groups were approached, in particular, suggests that there is a great deal of interest in further exchange of ideas and best practices in Music Cities around the world.

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