



# GREATER MADISON MUSIC CITY PROJECT MUSIC RECOVERY FRAMEWORK

Greater Madison Music City Project

**August 2022**

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## Sound Diplomacy Introduction

Dear Greater Madison Music City,

It has been a privilege to partner with you on this report, which is the next phase of a multi-phased process to create a more equitable music ecosystem in Greater Madison. This all started in 2018 with the publication of the landmark Taskforce on Equity in Music and Entertainment. Its recommendations created an initial roadmap to ensure that all musicians, no matter where they lived or who they were in Greater Madison, were supported and encouraged to pursue music and that all music, no matter its genre or discipline, was treated fairly. This report you have is a follow-on from that report, which demonstrates not only the economic value of music in Greater Madison, but also the inherent value it can continue to bring if we continue to work to improve policy, foster relationships and treat music - in all its forms and functions - as an ecosystem.

We are lucky to be working with such a dedicated and inspiring local team, who come from all backgrounds and disciplines. And while this report moves us forward, this is only one more stage in this process - which is just that, a process - to continue to improve Greater Madison's music ecosystem for all musicians, constituents and stakeholders. So have a read and get in touch. We'd love to hear from you.

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

## 1. Introduction

### 1.1 About the Project

Sound Diplomacy was engaged by The Greater Madison Music City Project to develop a music recovery framework to determine how Madison can build equity in the music industry and guide sustainable tourism and recovery efforts inclusively across all communities and demographics. The impacts of the COVID-19 pandemic world-wide led to significant global changes that impacted local economies and their music ecosystems. When music was paused in response to the pandemic, communities, like Madison, gained a new perspective on the value of music not just on the economy, but also on the social connectivity, tourism potential and cultural development of a community. As a response to this new shift in perspective of communities everywhere, Sound Diplomacy published its *Music Cities Resilience Handbook* which has helped us make a case for music as a driver for economic resilience and equity, converting relief into long-term investment, and all-encompassing

support – so music becomes a more economically, socially and culturally impactful sector in cities like Madison and all over the world.

With this new focus, building a robust recovery framework for Madison’s music ecosystem and its current state required identifying and analyzing where it can be leveraged to achieve its recovery, resilience and inclusivity goals. For this reason, the goal of the work presented in this report is to assist Madison and Dane County in building an equitable musical framework.

The project began in January 2021 as the first phase of the study into the local music economy and the first to provide in-depth analysis and insight into the effects of music in the city. The scope of this work focused on Madison’s music economic impact, while also analyzing a locally-led mapping exercise to deliver a comprehensive report on Madison’s current music ecosystem.

The second phase began in October 2021 with the objective of aiding the Greater Madison Music City Project in their efforts to grow Madison’s music ecosystem and supply chain, so it creates jobs, drives sustainable tourism and does so inclusively, across all communities and demographics. The scope of this work included a regulatory assessment and creative analysis, an updated economic impact and survey, and an action plan.

## 1.2 About Sound Diplomacy

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

## 1.3 Sound Diplomacy Embraces Inclusion, Equity and Diversity

**INCLUSION** - Our policy is to be intentional in engaging all voices, all genres, all styles & all disciplines in our stakeholder engagement process. We will work with our clients, and their constituents, to encourage inclusion of all voices across race, gender, style, discipline, age and vocation.

**EQUITY** - Our objective is to engage with the widest set of music assets, voices and infrastructure in all the cities and places we work. Music is everywhere and it comes in all

shapes, sounds and sizes. We embrace all genres, styles, colors, representations and opinions through the research and auditing process, from start-to-finish.

DIVERSITY - Music is our universal language. We all speak it. Our principle is to celebrate diversity throughout our work, in every way it manifests.

## 1.4 Our Commitment to the Sustainable Development Goals

In 2015, world leaders agreed to 17 goals for a better world by 2030. These goals have the power to end poverty, fight inequality and address the urgency of climate change. Guided by the goals, it is now up to all of us, governments, businesses, civil society and the general public to work together to build a better future for everyone.<sup>1</sup> The SDGs are made up of 17 commitments and 169 targets.



Our work aims to bring together the universal language of music with the universal language of sustainability and development, the UN Sustainable Development Goals. With all countries ratifying the UN's SDGs, a code and framework to guide sustainable development has grown to influence development arrangements and contractual obligations of donors and grantees.

<sup>1</sup> The Global Goals (n.d.) "Home". Online at <https://www.globalgoals.org/> accessed 30-06-2022

While culture is not part of the SDGs and seen as transversal - a part of all SDGs - there have been guides produced to better understand the role culture can play in meeting the largest, more serious goals of our time. United Cities and Local Governments' *Culture and the SDGs*, is one example and provides guidance for this report.

There is a role for music to play in each of the SDGs. From its global industry creating stars and packing arenas to the simple act of learning to play an instrument at a young age, to deploying the restorative power of music to support healthy aging, music can help meet the global goals. But we need these languages - music and sustainable development - to communicate. This guide is an attempt to do so - to define, across each of the 17 SDGs and multiple additional targets, specific actions that can be taken to use music more deliberately and intentionally to meet our global goals.

## 1.5 Methodology Summary

**Regulatory Assessment and Literature Review** - Analysis of local and national literature and policies relevant to the city of Madison's music industry and ecosystem.

**Economic Impact Assessment** - An assessment of the direct, indirect and induced economic value of the music industry in Dane County .

**Mapping Analysis** - Identification of music assets in Dane County, Wisconsin. The geographic scope of this assessment is limited to Dane County and specifies the contribution of Madison, Wisconsin to the county's music ecosystem.

**Stakeholder Engagement** - To complement the work completed by Sound Diplomacy, the Greater Madison Music City Project conducted four work group discussions to help inform our data. They also distributed an online survey and made appearances and presentations to various stakeholder groups for increased input. Information gleaned from these sessions are included in the SWOT Analysis.

**Comparative Analysis** - A review of literature and policies in three comparable cities (Austin, Texas, Boise, Idaho, and Eugene, Oregon) relevant to delivering an actionable music strategy in Madison.

**SWOT Analysis** - A full analysis of all findings (mapping, literature review and regulatory assessment, and economic impact) to identify all strengths, weaknesses and potential opportunities for, and threats to music industry in Dane County

**Strategic Plan** - A set of 14 actionable recommendations to take forward divided into four sections: Zoning and Planning, Licensing and Regulations, Economic Development, and Education.

For a detailed explanation of all methodologies, please refer to the end of the report.

## 2. Music Ecosystem Overview

### 2.1 Regulatory Assessment

| TOPIC                                | CITY'S POLICY  | BEST CASE   |
|--------------------------------------|--|---|
| Music Education<br><br>In Place? YES | <p>The Madison Metropolitan School District (MMSD) adheres to the Wisconsin Music Educators Association and Wisconsin Standards for Music in their instructional processes.<sup>2</sup> In 2022 MMSD devoted 1.3 million in Elementary and Secondary School Emergency Relief (ESSER) funds towards a Summer Arts Academy<sup>3</sup> and gave out instruments to children. MMSD, City of Madison, UW Arts Collaboratory, Overture Center for the Arts, Arts for All, &amp; the Madison Children's Museum all actively participate in Any Given Child Madison, a collective impact project started by the Kennedy Center that works to strengthen arts education in the schools.<sup>4</sup></p> <p>Other youth-oriented arts education programs include UW-Madison's Summer Arts</p> | <p>Nashville's Music Makes Us initiative is a partnership with Metro Nashville Public Schools, the Mayor's Office and the Nashville music community. The program's main goal is to eliminate barriers to music education and increase student participation while adding a contemporary curriculum that embraces new technologies and reflects the diverse student population.<sup>21</sup></p> |

<sup>2</sup> Wisconsin Department of Public Instruction (2017) "Wisconsin Standards For Music." Online at <https://dpi.wi.gov/sites/default/files/imce/fine-arts/WIMusicStandardsFINALADOPTED.pdf> accessed 20-12-2021

<sup>3</sup> Madison Metropolitan School District (2022) Website. Online at <https://www.madison.k12.wi.us/families/summer-arts-academy> accessed 9-8-2022

<sup>4</sup> Any Given Child Madison (2022) Website. Online at <https://anygivenesschildmadison.org/> accessed 9-8-2022

<sup>21</sup>Music Makes Us (2019) Website. Online at <https://musicmakesus.mnps.org> accessed 7-2-2022



| TOPIC | CITY'S POLICY  | BEST CASE |
|-------|--|-----------|
|       | <p>Clinic,<sup>5</sup> The Wisconsin Youth Symphony Orchestra<sup>6</sup> (which includes Madison Music Makers,<sup>7</sup> a program that provides instruction and performance opportunities regardless of students ability to pay), Madison Youth Choirs,<sup>8</sup> and the Madison Youth Arts Center (MyArts),<sup>9</sup> Music con Brio,<sup>10</sup>Dane County Boys and Girls Club .<sup>11</sup></p> <p>College Music programs are offered at the Mead Witter School of Music at UW-Madison,<sup>12</sup> Madison Area Technical College,<sup>13</sup> and Edgewood College.<sup>14</sup></p> <p>Further courses, professional development, and networking programs are offered through the University of Wisconsin-Madison's Professional Learning and Community Engagement (PLACE)</p> |           |

<sup>5</sup> University of Wisconsin - Madison (n.d.) "Badger Precollege - Summer Music Clinic." Online at <https://precollege.wisc.edu/smc/> accessed 20-12-2021

<sup>6</sup> Wisconsin Youth Symphony Orchestra (n.d.) "Home." Online at <https://wysomusic.org> accessed 20-12-2021

<sup>7</sup> Madison-area Out-of-School Time (2022) Website. Online at <https://mostmadison.org/organizations/madison-music-makers#:~:text=Since%202008%2C%20Madison%20Music%20Makers.large%2Dgroup%20instruction%20and%20rehearsals> accessed 9-8-2022

<sup>8</sup> Madison Youth Choirs (n.d.) "Home." Online at <https://www.madisonyouthchoirs.org> accessed 20-12-2021

<sup>9</sup> Madison Youth Arts (n.d.) "Home." Online at <https://www.madisonyoutharts.org> accessed 20-12-2021

<sup>10</sup> Music Con Brio (2022) Website. Online at <https://www.musicconbrio.org/> accessed 9-8-2022

<sup>11</sup> Boys & Girls Clubs of Dane County (n.d.) "Arts Programs." Online at <https://www.bgcdc.org/programs/club-based-programs/arts-programs> accessed 10-12-2021

<sup>12</sup> Mead Witter School of Music (n.d.) "Graduate Admissions." Online at <https://music.wisc.edu/graduate-admissions/> accessed 20-12-2021

<sup>13</sup> Madison Area Technical College (n.d.) "Music." Online at <https://students.madisoncollege.edu/music-department> accessed 20-12-2021

<sup>14</sup> Edgewood College (n.d.) "Music Department." Online at <https://music.edgewood.edu> accessed 20-12-2021

| TOPIC   | CITY'S POLICY   | BEST CASE   |
|---|---|---|
|   | <p>program,<sup>15</sup> the Arts + Literature Lab,<sup>16</sup> the Urban Community Arts Network,<sup>17</sup> Teen Bubbler,<sup>18</sup> and the Communication program,<sup>19</sup> and the Wilder Deitz School for Creative Music.<sup>20</sup></p>   |   |
| <p>Grants<sup>22</sup></p> <p>In Place? YES</p> | <p>Madison Arts Commission annual grants program includes: Project Grants, Art Education Grants, Legacy Grants, Individual Artist Fellowship Awards, Art in Public Places and BLINK. These fund art programs for students, permanent and temporary public art projects, individual artists and performers, and nonprofits.<sup>23</sup></p> <p>Dane Arts, the county's arts and cultural affairs commission, has a grant program which supports arts, culture, and local historical activity in Dane County. There are two grant cycles per year which distribute several hundred thousand dollars from local public and private sources over 150</p> | <p>While there are several best case examples of arts and culture grants, Creative Victoria, in Australia, has created a music-specific funding programme which issues grants to music venues to help them in making structural changes to contain sound and prevent complaints that could lead to closures. The fund is aimed at helping with minor soundproofing changes that will prevent venues from having to make major structural adjustments. Grants can be used to source professional acoustic advice, install double-glazing, purchase sound-absorbing furnishings and install technology that ensures</p> |

<sup>15</sup> PLACE (n.d.) "Arts Programs." Online at <https://place.education.wisc.edu/arts-programs/> accessed 10-12-2021

<sup>16</sup> Art Lit Lab (n.d.) "Home." Online at <https://artlitlab.org> accessed 10-12-2021

<sup>17</sup> Urban Community Arts Network (n.d.) Website. Online at <https://www.ucanmadison.org/programs/rap-up/> accessed 6-16-2022

<sup>18</sup> Teen Bubbler (2020) Website. Online at <https://www.teenbubbler.org/creations/media-academy-2017> accessed 6-16-2022

<sup>19</sup> Communication Madison (n.d.) "Home." Online at <https://communicationmadison.com> accessed 09-12-2021

<sup>20</sup> Wilder Deitz School for Creative Music (n.d.) "Home." Online at <https://wilderdeitzschool.com> accessed 09-12-2021

<sup>22</sup> Refers to grants that specifically reference the art sector broadly or music sector specifically

<sup>23</sup> City of Madison (2022.) "Madison Arts Commission Annual Arts Grants Opportunity 2020-2021." Online at <https://www.cityofmadison.com/news/madison-arts-commission-annual-arts-grants-opportunity-2020-2021> accessed 16-12-2021

| TOPIC   | CITY'S POLICY  | BEST CASE  |
|---|--|--|
|   | <p>awards with project, short order project and capital grants.<sup>24</sup></p> <p>The Wisconsin Arts Board also offers several grants including: Creation and Presentation grant, Creative Communities grant, Woodland Indian Arts Initiative, Arts Challenge Initiative, Wisconsin Regranting Initiative, Folk Arts Apprenticeship Program.<sup>25</sup></p> <p>Annual grants are subject to City and County budgetary allocations.</p> | <p>high quality sound at lower volumes.</p> <p>Because the mapping assessment shows that Madison has a lack of dedicated music venues, a program like this could help to optimize performance opportunities.<sup>26</sup></p>  |
| <p>Business Incentives<sup>27</sup></p> <p>In Place? NO</p> | <p>The Small Business Equity and Recovery (SBER) grant provides support to small businesses owned by people of color in recognition of the systemic inequities faced by such populations.<sup>28</sup> As of February 2021, the grant is no longer accepting applications.</p>   | <p>Oregon has designed itself as a hub for small and medium businesses due to the tax considerations they make.<sup>29</sup> The two major tax breaks for these businesses are the Oregon Investment Advantage and the Oregon New Market Tax Credit. Businesses that hire small numbers of employees are able to almost completely eliminate</p> |

<sup>24</sup> Dane Arts (n.d.) "Grants." Online at <http://www.danearts.com/grants> accessed 08-12-2021

<sup>25</sup> State of Wisconsin (2022) Website. <https://artsboard.wisconsin.gov/pages/Community/GrantPrograms.aspx> accessed 6-16-2022

<sup>26</sup> Creative Victoria (2019) "Music Works - Good Music Neighbours". Online at <https://livemusicoffice.com.au/creative-victoria-good-music-neighbours-grants/> accessed 07-02-2022

<sup>27</sup> "Business incentive" refers to any tax credits or write offs, tangible gifts, or benefits that encourage businesses to set up shop in a specific location

<sup>28</sup> City of Madison (2021) "Supporting Small Businesses." Online at <https://www.cityofmadison.com/mayor/blog/supporting-small-business> accessed 20-12-2021

<sup>29</sup> Claiborne, Monique (2018) "2 Reasons Businesses Are Making the Move to Portland, Oregon (That No One's Been Talking About)". Online at <https://www.inc.com/monique-claiborne/2-reasons-businesses-are-making-the-move-to-portland-that-no-ones-been-talking-a.html> accessed 07-02-2022

| TOPIC  | CITY'S POLICY   | BEST CASE   |
|--|---|---|
|  |   | <p>state business income tax liability for 8 years, allowing them to put money back into their company with the help of the Oregon Investment Advantage. In a bid to get businesses to invest in low-income communities, the Oregon New Market Tax Credit gives a 39% tax credit of the total amount invested across a 7 year period back to the company.</p>   |
| <p>Liquor Licensing<br/><sup>30</sup></p> <p>In Place? YES</p> | <p>While Alcohol licenses are granted by the City of Madison's Common Council, the Alcohol Review License Committee (ALRC) makes recommendations to the council. Alcohol license classifications include: Class A - allows the sale of alcohol for consumption elsewhere than on the premises where sold; Class B - allows the sale of alcohol for consumption either on or off the premises where sold; and Class C - allows the sale of alcohol for consumption on the premises where sold and and limited sales for off-premises consumption.</p> <p>The legal drinking age is 21. Retail alcohol sales are prohibited between 9pm-6am for</p> | <p>The Department of Liquor and Lottery, Division of Liquor Control (DLC) in Vermont has on its website a plain-language guide and description of the liquor licenses available for applicants, including the necessary steps to obtain one.<sup>32</sup> A certified employee in a business with a First Class License is able to train employees on the rules and regulations related to selling/serving alcohol by using the DLC in-house training kit, which eliminates the additional training expenses and requirements on workers of licensed premises.<sup>33</sup></p> |

<sup>30</sup> The liquor licensing permit process is relevant for this study, because many venues that host live music also make money from serving alcoholic beverages to patrons.

<sup>32</sup> Vermont Division of Liquor Control (2019) "What Kind of License Do I need to...." Online at <https://liquorcontrol.vermont.gov/which-license> accessed 07-02-2022

<sup>33</sup> Vermont Division of Liquor Control (2019) "Education." Online at <https://liquorcontrol.vermont.gov/education> accessed 07-02-2022

| TOPIC  | CITY'S POLICY   | BEST CASE  |
|--|---|--|
|  | <p>hard liquor and 12am-6am for beer. Beverage alcohol sales are prohibited between 1:45am-6am Mon-Fri and 2:15am-6am Sat-Sun (no closing required on New Years Eve).<sup>31</sup> However, they can remain open for 30min after sales cease.</p>   |  |
| <p>Special Events Permit<sup>34</sup></p> <p>In Place? YES</p> | <p>Special events permits are dispersed by the city and include downtown performance space, neighborhood block parties, rallies and marches, park events, street use events, and filming and photoshoots.<sup>35</sup></p> <p>In July 2022, the Madison Arts Commission published their Outdoor Music Guide (OMG) which provides information on what musicians and event organizers “can successfully do outdoors to deliver music-related activities within the City of Madison.”<sup>36</sup></p> | <p>Seattle’s Special Events Office has its own website with extensive guidelines on how to apply and what to expect when requesting a Special Event Permit. The main website for the Special Events Office includes clear application instructions in its online forms, Public Safety requirements, a calendar of approved events and a Special Event Handbook to refer to. Forms attached include the actual permit application (including templates and instructions), a permit fee estimator (administrative fees start at \$275 per permit) and an online handbook.<sup>37</sup></p> |

<sup>31</sup> City of Madison (2022) “Licenses and Permits.” Online at <https://www.cityofmadison.com/clerk/licenses-permits> accessed 03-02-2022

<sup>34</sup> Special Event Permits are applicable to festivals and other outdoor musical events

<sup>35</sup> City of Madison (n.d.) “Special Events.” Online at <https://www.cityofmadison.com/SpecialEvents/> accessed 20-12-2021

<sup>36</sup> City of Madison (2022) “Outdoor Music Guide.” Online at [https://www.cityofmadison.com/dpced/planning/documents/Arts\\_Outdoor\\_Music\\_Guide\\_final.pdf](https://www.cityofmadison.com/dpced/planning/documents/Arts_Outdoor_Music_Guide_final.pdf) accessed 18-8-2022

<sup>37</sup> Seattle Special Events Office (2019a) Forms and Applications. Online at <https://www.seattle.gov/special-events-office> accessed 07-02-2022

| TOPIC   | CITY'S POLICY   | BEST CASE   |
|---|---|---|
| <p>Noise and Curfews</p> <p>In Place? YES</p> | <p>According to the Madison Arts Commission's Outdoor Music Guide, "The City allows amplified sound (voice, instruments, and recordings) from a street or sidewalk during the following hours in most parts of the City without a permit: 12 pm to 1:30 pm and 5 pm to 7 pm, daily. However, that does not apply to areas along State Street or Rotary Plaza in front of the Children's Museum."<sup>38</sup></p> <p>In order to have amplified sound outdoors outside of these times, performers and/or event organizers must obtain permission from the City.</p> | <p>Nashville has separate codes for businesses operating within their Downtown Code district (DTC). Instead of restricting sound amplification by time of day, Nashville's DTC is restricted by their business operating hours. While commercialized use of sound emitting machinery is restricted to 70 decibels for businesses operating outside of the DTC from 9pm-6am, businesses within this district are allotted up to 85 decibels for prerecorded interior amplified sound during their business hours.<sup>39</sup></p> |

<sup>38</sup> City of Madison (2022) "Outdoor Music Guide." Online at [https://www.cityofmadison.com/dpced/planning/documents/Arts\\_Outdoor\\_Music\\_Guide\\_final.pdf](https://www.cityofmadison.com/dpced/planning/documents/Arts_Outdoor_Music_Guide_final.pdf) accessed 18-8-2022

<sup>39</sup> Metro Government of Nashville & Davidson County, Tennessee (2019) "Bill BL2019-1631." Online at <https://www.nashville.gov/Metro-Clerk/Legislative/Ordinances/Details/8dbc9d52-e217-428c-80b9-1076a220f313/2015-2019/BL2019-1631.aspx> accessed 07-02-2022.

| TOPIC   | CITY'S POLICY  | BEST CASE  |
|---|--|--|
| <p>Health and Safety Regulations<sup>40</sup></p> <p>In Place? NO</p> | <p>Public safety in Madison is managed by the Fire Department, Police Department and the city's Emergency Management Office which is located within the Fire Department.<sup>41</sup></p> <p>Public Health Madison &amp; Dane County has guidance for workplaces and businesses on their website.</p> <p>There are no sector-specific regulations.</p> | <p>London's Women's Safety Charter sets out guidance for venues, operators, charities, councils and businesses to improve safety at night for women. This includes better training of staff, encouraging the reporting of harassment, and ensuring public spaces are safe.<sup>42</sup></p>        |
| <p>Environmental Sustainability<sup>43</sup></p> <p>In Place? YES</p> | <p>Dane County Office of Energy &amp; Climate Change is a division within the County Executive's Office. The office uses its Climate Action Plan as a guide and strategy to reduce greenhouse gas emissions and address climate change by leading public and private efforts across the county and implementing strategies.<sup>44</sup></p>           | <p>Melbourne, Australia's Planning and Environment Act encourages decision makers to consider the environmental impact of proposed development projects. Environmental considerations include music noise and the social and economic benefits of live music and cultural events.<sup>45</sup></p> |

<sup>40</sup> These refer to any regulations specifically related to the music ecosystem, like best practices for venues and safety at live events.

<sup>41</sup> City of Madison (2022) "Public Safety." Online at <https://www.cityofmadison.com/city-hall/public-safety> accessed 03-02-2022

<sup>42</sup> Greater London Authority (2022) "Pledge to Improve Women's Safety at Night in London." Online at <https://www.london.gov.uk/press-releases/mayoral/pledge-to-improve-womens-safety-at-night> accessed 7-2-2022

<sup>43</sup> Refers to any music relate sustainable practices (ex. recycling and waste management at festivals).

<sup>44</sup> Dane County Office of Energy & Climate Change (n.d.) "Dane County Climate Action Plan." Online at <https://daneclimateaction.org/climate-action-plan> accessed 08-12-2021

<sup>45</sup> City of Victoria (2003) "Live Music Taskforce." Online at <https://greens.org.au/sites/greens.org.au/files/Live%2BMusic%2BTaskforce%2B-%2BReport%5B1%5D.pdf> accessed 07-02-2022

| TOPIC  | CITY'S POLICY  | BEST CASE   |
|--|--|---|
|  | <p>The Arts, Design and Culture sustainability category states that art, design and culture play vital roles in maintaining high quality of life and so should be an integral part of creating sustainable solutions for achieving civic goals.</p>  |   |
| <p>Busking<sup>46</sup><br/>In Place? NO</p> | <p>There is no official busking policy in place in Madison. Street performers who do not use public electricity for amplification are not required to be licensed and are generally allowed to play whenever and wherever as long as they do not receive complaints or obstruct the right of way.</p> <p>The only other specification is that buskers cannot assume a site issued to a City licensed vendor. They can play there if the vendor is not in their vending site but not when it is occupied by the vendor. This includes food carts, arts &amp; crafts, merchant vending, and sidewalk/roadway cafes.<sup>47</sup></p> | <p>The Asheville Busking Guide was created by the Asheville Buskers Collective to provide buskers and potential buskers with the dos and don'ts of the practice. It includes specific definitions for noise disturbances and includes city rules and laws.<sup>48</sup></p> |

<sup>46</sup> Merriam-Webster defines a “busker” as “a person who performs in a public place for donations.” Merriam-Webster (2022) “Busker Definition.” Online at <https://www.merriam-webster.com/dictionary/busker> accessed 06-16-2022

<sup>47</sup> City of Madison (2022) “Street Artists and Musicians.” Online at <https://www.cityofmadison.com/dpced/economicdevelopment/street-artists-musicians/278/> accessed 10-8-2022

<sup>48</sup> Polly McDaniel (2017) “Asheville Street Performers Brochure Provides Guidelines.” Online at <https://www.ashevillenc.gov/news/ashevilles-street-performers-brochure-provides-guidelines/> accessed 05-10-2021



| TOPIC  | CITY'S POLICY  | BEST CASE  |
|--|--|--|
| Regulations for Outdoors Advertising In Place? YES | <p>Events can be promoted via poster kiosks at Capitol Square and State Street.<sup>49</sup></p> <p>There are also transit advertising opportunities for businesses.<sup>50</sup></p>  | <p>The City of Vancouver, through the Transit Shelter Advertising Program, offers free access to transit shelter advertising space for non-profit arts and culture organizations. The organizations pay for and arrange the posters and the City of Vancouver's Cultural Services Department provides them with space at transit shelters allotted by Outfront Media.<sup>51</sup></p>   |
| Audience Development <sup>52</sup> In Place? YES   | <p>The City of Madison's 2013 Performing Arts Study assessed the performing arts environment including existing and potential audiences. The dashboard tool allows performing arts organizations to gain insights into audience development and marketing through extensive data on performing arts attendees characteristics and demographics.<sup>53</sup></p> <p>PBS Wisconsin hosts a 30-Minute Music Hour as a way to</p> | <p>Night Out<sup>55</sup> is an Arts Council of Wales (ACW) initiative that helps local organizations to bring professional performances into community buildings at subsidized prices. This initiative helps hundreds of community groups across Wales to bring the arts to the heart of their communities by selecting and hosting professional performing arts events in non-traditional smaller scale venues (mostly village halls and community centers).</p> |

<sup>49</sup> City of Madison (2022) "Community Events on Madison Street." Online at <https://www.cityofmadison.com/specialevents/streetevents/marketing.cfm> accessed 27-06-2022

<sup>50</sup> City of Madison (2022) "Advertise with Metro Transit." Online at <https://www.cityofmadison.com/metro/business/advertise> accessed 27-06-2022

<sup>51</sup> City of Vancouver (2019) "Transit Shelter Advertising Program". Online at <https://vancouver.ca/people-programs/transit-shelter-advertising-program.aspx> accessed 07-02-2022

<sup>52</sup> Refers to programs specifically designed to garner more audience participation in artistic events.

<sup>53</sup> City of Madison (2022.) "Plans, Studies, and Reports" Online at <https://www.cityofmadison.com/dpced/planning/plans-studies-reports/3844/> accessed 08-12-2021

<sup>55</sup> Arts Council of Wales (2018) "The Night Out Scheme". Online at <http://www.nightout.org.uk/performers-info/about-night-out.aspx> accessed 17-10-2018

| TOPIC                            | CITY'S POLICY  | BEST CASE  |
|----------------------------------|--|--|
|                                  | showcase the state's independent artists. <sup>54</sup>  |  |
| Music Office<br><br>In Place? NO | <p>While Madison does not have a dedicated Music Office as part of local government, the Greater Madison Music City project advocates on behalf of local musicians and music businesses, particularly in regards to racial equity and access<sup>56</sup> and the City of Madison neighborhood planner has been given a 20% staffing assignment to work on Greater Madison Music City Projects.<sup>57</sup></p> <p>In addition, the City of Madison's Arts Program Administrator works diligently to serve as a voice for the Greater Madison creative community, develop programs that speak to their needs, and advocate on their behalf.</p> | <p>Nashville's Music City Music Council is a collaboration between the Mayor's Office, Chamber of Commerce and Convention &amp; Visitors Corp. Its focus is economic development, working to expand local business while attracting new businesses.<sup>58</sup></p> |

<sup>54</sup> PBS Wisconsin (n.d.) "30-Minute Music Hour." Online at <https://pbswisconsin.org/watch/30-minute-music-hour/> accessed 09-12-2021

<sup>56</sup> Greater Madison Music City (n.d.) "Our Mission." Online at <https://ourgmmc.org/mission/> accessed 05-02-2022

<sup>57</sup> Task Force on Equity in Music and Entertainment (2018) "Task Force on Equity in Music and Entertainment." Online at

[https://static1.squarespace.com/static/58f7f35e9f745630b6952af8/t/5ee8ddebfb9c756767df9120/1592319470180/TFEME\\_report.pdf](https://static1.squarespace.com/static/58f7f35e9f745630b6952af8/t/5ee8ddebfb9c756767df9120/1592319470180/TFEME_report.pdf) accessed 26-01-2022

<sup>58</sup> Music City Music Council (2021) Online at <https://nashvillemusiccouncil.com> accessed 05-02-2021

| TOPIC  | CITY'S POLICY  | BEST CASE   |
|--|--|---|
| <p>Entertainment Districts Policy</p> <p>In Place? YES</p> | <p>Madison Central Business Improvement District (BID) serves as the city's entertainment district. The BID is a concentration of shopping, dining and entertainment experiences including art galleries, museums, libraries, arts centers and the University of Wisconsin. The BID is also home to multiple events, festivals, markets, concerts and walks.<sup>59</sup></p> <p>BID funds are used for marketing the district, business recruitment and retention, and enhancements like downtown art, holiday lights, flower planters, an Ambassador program and a Downtown Map &amp; Guide.</p> | <p>Austin has six official entertainment districts, each distinct in aesthetic and offer. Downtown Austin is the main commercial area, divided into three sub-areas (2nd Street, Warehouse District and West Sixth Street) and concentrating a higher profile of entertainment and dining options compared to the rest of the districts. East Austin is the fastest growing neighborhood, famous for its eclectic and alternative offer of entertainment, food options and bars.<sup>60</sup></p> |
| <p>Agent of Change</p> <p>In Place? NO</p>                 | <p>The City of Madison has no Agent of Change policy in place. The Agent of Change Principle holds the entity that creates a change in an area responsible for the impact this change can have in that area.</p>   | <p>San Francisco Mayor, London Breed's amendment to Chapter 116 of the local ordinances states existing venues, so long as they are in keeping with existing noise laws, are protected from the complaints of any new residences, hotels or motels built nearby.<sup>61</sup></p>   |

<sup>59</sup> Visit Downtown Madison (n.d.) "About." Online at <https://visitdowntownmadison.com/about> accessed 17-12-2021

<sup>60</sup> Visit Austin (2019) "Austin's Entertainment Districts." Online at <https://www.austintexas.org/meeting-professionals/get-to-know-austins-entertainment-districts/> accessed 07-02-2022

<sup>61</sup> City and County of San Francisco (2015) "Compatibility and Protection for Residential Uses and Places of Entertainment" Online at <https://sfgov.org/entertainment/sites/default/files/FileCenter/Documents/2790-Chapter116.pdf> accessed 07-02-2022

| TOPIC  | CITY'S POLICY  | BEST CASE   |
|--|--|---|
| <p>Parking Regulations<sup>62</sup></p> <p>In Place? YES</p> | <p>The City offers temporary “no parking” signs at discounted rates to venues in order to accommodate large moving trucks or oversized vehicles.<sup>63</sup></p>  | <p>In Nashville a deal was brokered between Premier Parking and the local musicians’ union, in which special \$5 nightly rates will be offered for musicians.</p> <p>Additionally, the Renaissance Hotel in the city center has started offering \$9 valet parking services for musicians.</p> <p>Parking vouchers for the hotel are handed out in local music venues, intended to be given to musicians to access those prices.<sup>64</sup></p> |
| <p>Transit<sup>65</sup></p> <p>In Place? YES</p>             | <p>Dane County Regional Airport is six miles northeast of downtown Madison. The proximity means that it can be easily accessed by taxi or Madison metro bus.<sup>66</sup></p> <p>Madison’s Metro Transit bus system has 47 routes with primary routes operating from 6 a.m. - 11:30 p.m. every day and</p> | <p>Toronto’s Blue Night Network is the most extensive nighttime transit service in North America, with routes picking up after trains cease service between 1am-2am. Routes run approximately every 30 minutes until morning service resumes, and are spaced in order to keep 99% of the city within a 15 minute walk of a stop.<sup>70</sup></p>   |

<sup>62</sup> Can apply to downtown entertainment and music venues where patrons would need to find parking accommodations.

<sup>63</sup> City of Madison (2022) “Temporary No Parking Signs.” Online at <https://www.cityofmadison.com/parking-utility/street-parking/additional-parking-services/temporary-no-parking-signs> accessed 27-06-2022

<sup>64</sup> Premier Parking (2017) “New Parking Offers for Downtown Nashville Musicians.” Online at <https://www.premierparking.com/why-premier/new-parking-offers-downtown-nashville-musicians/> accessed 08-02-2022

<sup>65</sup> Transit is significant for any music ecosystem when considering touring and access to a varied demographic.

<sup>66</sup> Dane County Regional Airport Madison (n.d.) “Parking & Transportation.” Online at [https://www.msnairport.com/parking\\_transportation](https://www.msnairport.com/parking_transportation) accessed 17-12-2021

<sup>70</sup> Novakovic, Stefan (2017) “TTC Set to Expand Blue Night Network in September”. Online at <https://urbantoronto.ca/news/2015/08/ttc-set-expand-blue-night-network-september> accessed 07-02-2022

| TOPIC | CITY'S POLICY   | BEST CASE |
|-------|---|-----------|
|       | <p>campus routes operating till 3 a.m.<sup>67</sup></p> <p>The city is working to implement a Bus Rapid Transit system with construction expected to begin in 2023.<sup>68</sup> Improvements are expected to improve riding experiences and reduce travel time by up to 25%.<sup>69</sup> Nearly 120,000 jobs are located within a 10-minute walk of the planned system.</p> |           |

Table 5. Madison At A Glance  
Diplomacy

Developed by: Sound

<sup>67</sup> Metro Transit (n.d.) "Home." Online at <https://www.cityofmadison.com/metro> accessed 17-12-2021

<sup>68</sup> Metro Transit (n.d.) "Bus Rapid Transit (BRT)." Online at <https://www.cityofmadison.com/metro/routes-schedules/bus-rapid-transit> accessed 17-12-2021

<sup>69</sup> City of Madison (2022) "Bus Rapid Transit." Online at <https://www.cityofmadison.com/metro/routes-schedules/bus-rapid-transit> accessed 03-02-2022

## 2.2 Economic Impact Analysis

### 2.2.1 Definition of the Music Ecosystem

Music is inherently part of every cities' ecosystem. Like in nature, this ecosystem is formed by a group of stakeholders, a set of resources and an environment where they develop their activities, connect with each other and with other ecosystems. Like in all ecosystems, these relationships are interdependent. Some stakeholders exist simply because others exist, and because there is a sustainable environment that favors their survival. In the case of music, these agents are responsible for everything related to music, starting with the artists going all the way to the audience. Some of its elements, like music venues or labels, are obvious. But others, like IT suppliers, designers, or government organizations, are less so. Still, they are all relevant, and they all play an important role in the chain.

For the Economic Impact Assessment, nevertheless, the definition of the music ecosystem has to be narrower so it is related to the value of the stakeholders most closely related to music. As part of this analysis, the music ecosystem is divided into two segments:

- On the one hand, there is the Artistic and Creative Segment, which groups the musical artists, musicians, creators, and songwriters.
- On the other hand, there is the Professional and Supporting Segment, which includes music-related businesses such as manufacturing, publishing and distribution, managers and agents, music venues, radio broadcasting, and music education.

The economy of music can be understood as a segment of the economy of culture. It seeks to explain the phenomena of the music sector by making use of economic and statistical tools with the fundamental purpose of providing insights for public policy and private decision making. The economy of music is not only limited to understanding the transactions of goods and services in the market, but it can also become a useful tool to understand the dynamics of non-monetary resources existing within the music ecosystem.

### 2.2.2 Economic Impact Overview

The Economic Impact Assessment not only highlights the City of Madison, but also the Greater Madison Area constituted by the surrounding cities, towns, and communities that make up Dane County. This decision was made consciously to account for the fact that contributions to Madison's music ecosystem are not restricted to the capital city.

The two segments of the Dane County music ecosystem – Artistic & Creative and Professional & Supporting – delivered a total economic impact<sup>71</sup> of 5,791 jobs, a total output of \$637 million, a total gross value added (GVA) of \$428 million and a total workers compensation of \$218 million in 2018.<sup>72</sup>

The total employment created and supported by the Dane County music ecosystem generates 1.86% of the county’s employment, a figure exceeding the contribution of music employment to New York City (1.4%) and the average employment contribution of the music ecosystem registered at the national level (1.3%).

| TYPE OF IMPACT      | EMPLOYMENT (NUMBER OF JOBS) | OUTPUT MILLION \$ | GROSS VALUE ADDED MILLION \$ | EARNINGS OR COMPENSATION MILLION \$ |
|---------------------|-----------------------------|-------------------|------------------------------|-------------------------------------|
| <b>Direct</b>       | 3,961                       | 415               | 292                          | 144                                 |
| <b>Indirect</b>     | 660                         | 86                | 53                           | 30                                  |
| <b>Induced</b>      | 1,170                       | 136               | 83                           | 44                                  |
| <b>Total Impact</b> | 5,791                       | 637               | 428                          | 218                                 |

Table 5. Dane County, Direct, Indirect, Induced and Total Economic Impact. Source: Sound Diplomacy  
Developed by: Sound Diplomacy

Madison concentrates more than 82% of the economic activity related to the music ecosystem within Dane County. The sector generates a total of 4,865 jobs, a total Output of \$525 million, a total GVA of \$350 million and a compensation of \$182 million.

When focusing on the direct economic impact, the Dane County music ecosystem generated 3,961 direct jobs, \$144 million in earnings, \$415 million in economic direct output and \$292 million in GVA in 2018. The majority of the direct economic value of the sector is created by the Professional and Supporting Segment (89%), while the Artistic Segment represents 11% of the direct economic output.

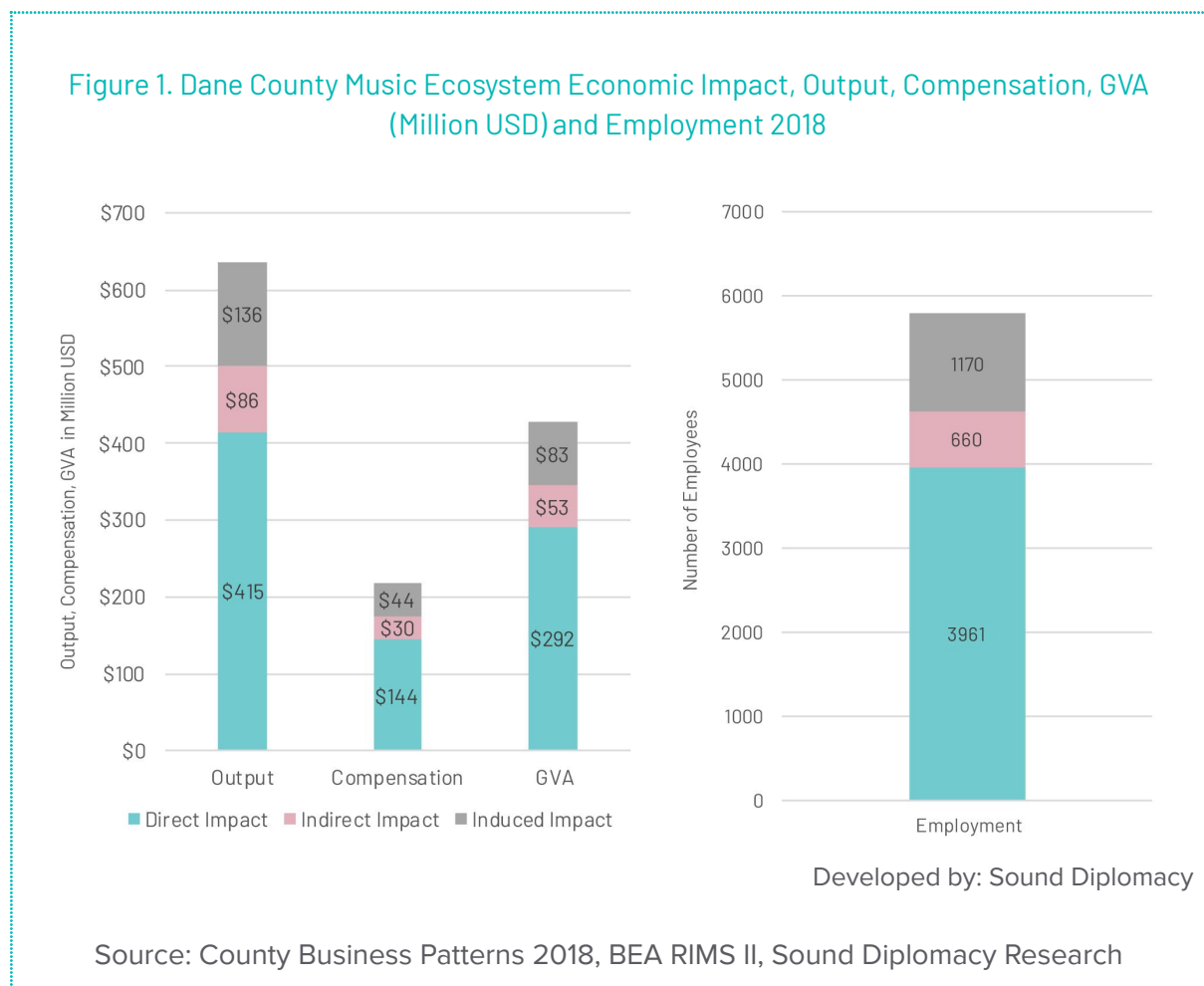
<sup>71</sup> For definitions, refer to the Economic Impact Methodology below

<sup>72</sup> The results contained in this report correspond to data from 2018 and previous years. This is due to the fact that at the time of preparing the study, some of the most relevant data sources had a delay of three years. For example, during the research process, the most current version available for the County Business Patterns and RIMS II multipliers was 2018 data.

For every \$1,000 of output generated by the music ecosystem in Dane County, there is an indirect effect of \$206 in the output of other industries locally, and an induced effect of \$326 on different industries as well.

### 2.2.3 Dane County Music Economic Impact

Figure 1 summarizes the economic impact (direct, indirect, and induced) of the music ecosystem in Dane County for 2018. It generated and supported a total of 5,791 jobs (1.86% of the employment in the county). In the same year, the output generated by the music ecosystem was \$636 million<sup>73</sup>, its total GVA was \$428 million and the total compensation of the workers was \$218 million.



<sup>73</sup> Values are rounded to the nearest whole number. Total output was \$636.3 M USD, Direct impact output was \$415 M USD, Indirect impact output was \$85.8 M USD and Induced impact was \$135.5 M USD.



The following sections give an overview of the direct, indirect and induced impact of the Dane County music ecosystem.<sup>74</sup>

### 2.2.4 Direct Impact

The direct impact reflects the economic value created directly by the activities of the music ecosystem. The Dane County music ecosystem produced a direct output of \$415 million and an estimated GVA of \$292 million. It was responsible for 3,961 direct jobs, and the compensation of these employees (including both the professional and artistic segments) reached \$144 million.

Madison's music ecosystem contributes with 84% (3,340) of the County's employment, as well as 82% of the output (\$341 million), and 81.29% (\$237 million) and 83.13% (\$120 million) of the GVA and compensation respectively, which implies that it is the area with the largest economic activity concentration of the music ecosystem in Dane County (see Figure 2). The following figure reflects Madison's economic contribution to the Dane County's music ecosystem.

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<sup>74</sup> For a list of music ecosystem definitions used in the economic impact assessment of the strategy, including NAICS codes, RIMS II multipliers, SOC for music ecosystem activities please see [Appendix 1](#).

Figure 2. Dane County and Madison's Music Ecosystem Direct Economic Impact, Output, Compensation, GVA (Million USD) and Employment 2018



Developed by: Sound Diplomacy

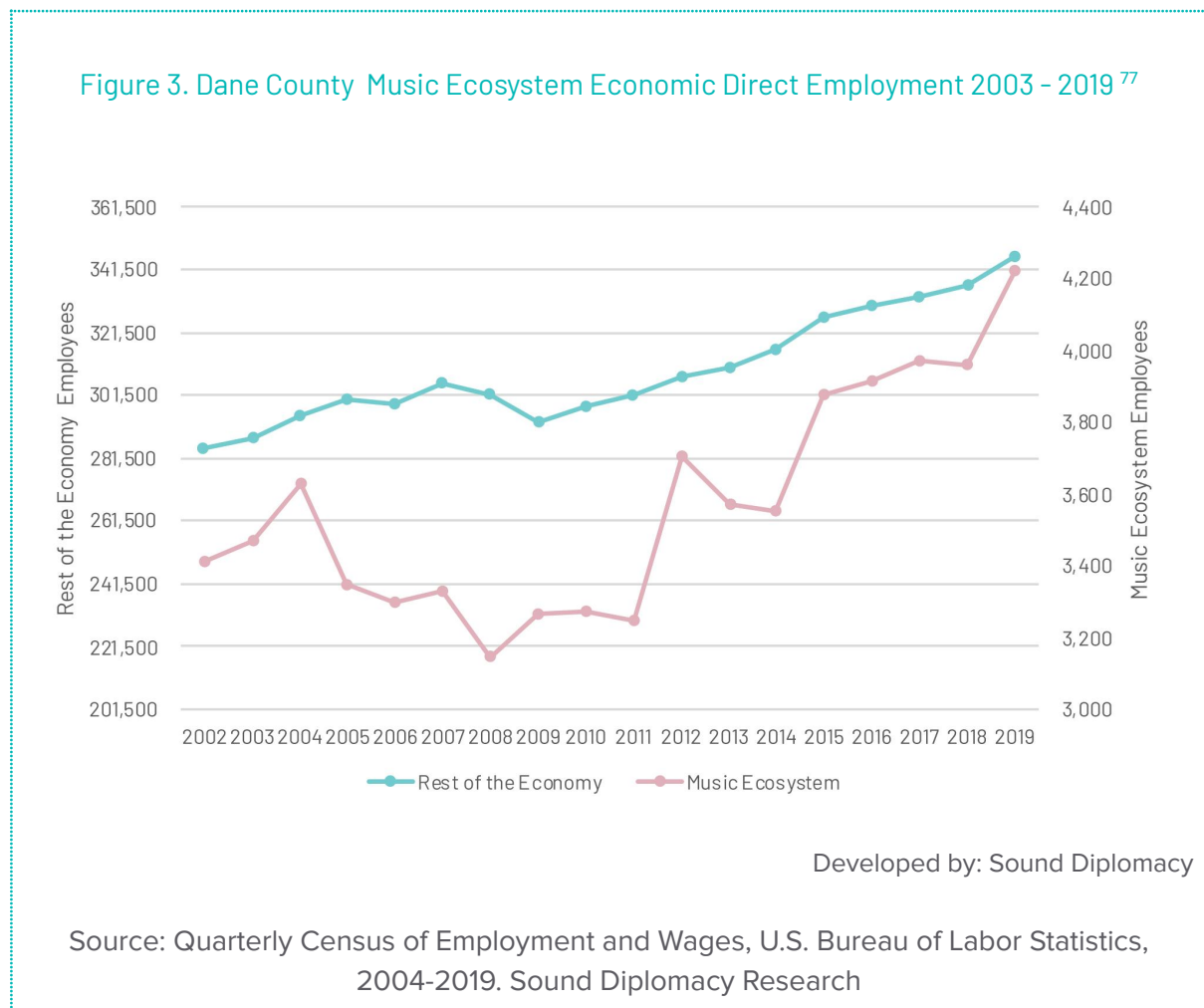
Source: County Business Patterns 2018, BEA RIMS II, Sound Diplomacy Research

According to our calculations, Dane County's music ecosystem employment grew at a similar rate than the rest of the economy between 2003 and 2019, with an average growth of 1.4% for the music ecosystem and 1.2% for the rest of the economy (between 2002 and 2019).<sup>75</sup>

On average each year between 2002 and 2019 in Dane County, the employees in both economies constantly grew. However, the music ecosystem showed a stronger variation in employment within the years. Whilst in the rest of the economy in Dane County the number of employees every year grew steadily (no high increases or decreases), in the music ecosystem there were some years where the number of employees dropped or increased significantly. Specifically during the years 2005, 2012, 2015 and 2019, the variation within the music ecosystem exceeded 5%, whereas in the rest of the economy, the magnitude of such changes never occurred (all under 3.5%) (see figure 3). Such variation within the music ecosystem could be attributed to the higher vulnerability of the overall artistic and creative sector towards economic variations or externalities such as economic recessions and governmental

<sup>75</sup> Source: Quarterly Census of Employment and Wages, U.S. Bureau of Labor Statistics, 2004-2019.

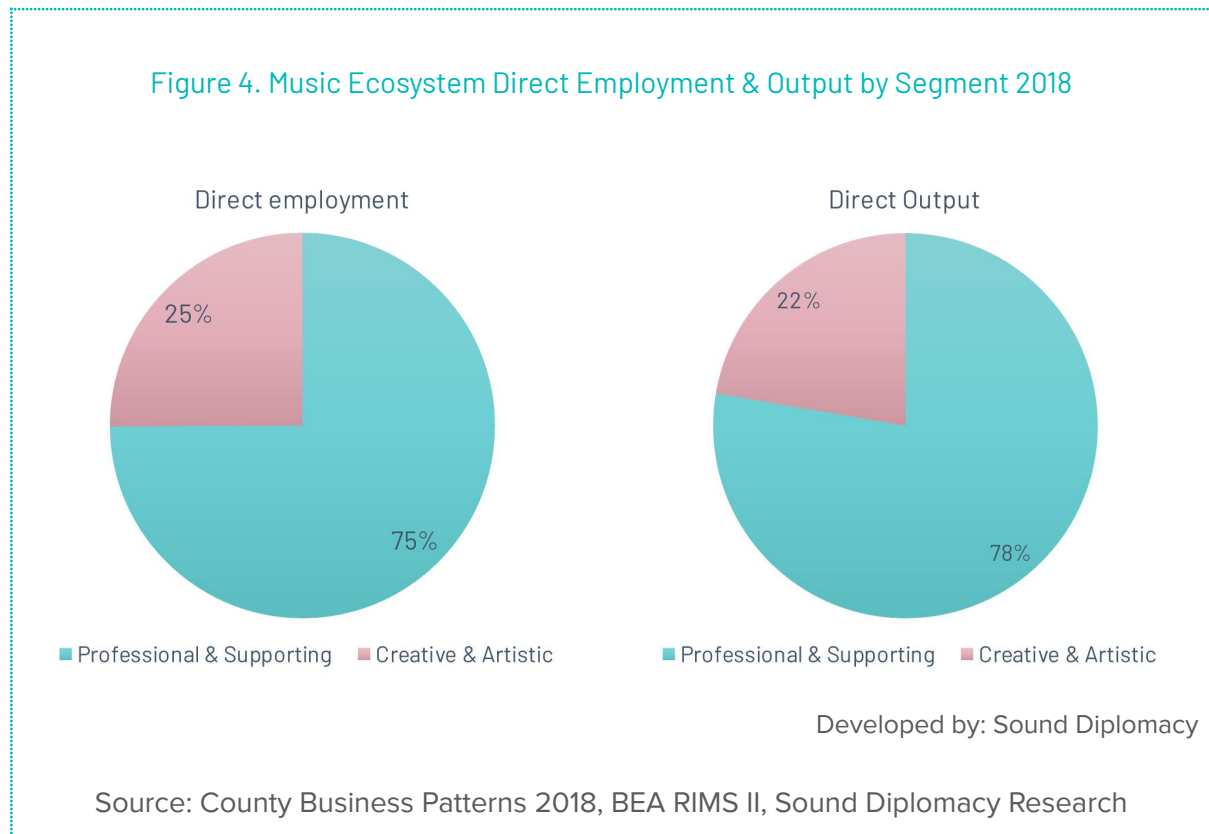
budget assignment to the sector.<sup>76</sup> Moreover, this could also be attributed to a limitation in the sampling from the Quarterly Census of Employment and Wages (QCEW) survey.



<sup>76</sup> The correlation between the total budget in Dane’s County and the employment in the rest of the economy during the period 2002 and 2019 was 0.91% and the correlation of the budget assigned to ‘culture, education and recreation’ and the total employment in the music ecosystem in Dane County during the period 2003 and 2019 was 0.71%. This means that the correlation between the annual budget assigned and the employment per year is strong (above 0.70%), and as such, they could influence one another.

<sup>77</sup> We excluded the economic activities: ‘7113 Promoters of performing arts and sports’, ‘NAICS 7114 Agents and managers for public figures’, ‘45114 Musical instrument and supplies stores’, ‘51224 Sound recording studios’, ‘51229 Other sound recording industries’ and ‘61161 Fine arts schools’ when calculating the employment trend from the source Quarterly Census of Employment and Wages. These exclusions were necessary since there was information of employment of those industries only for some of the years in the analyzed period. Including them would have generated a distortion in the employment trend.

The economic activities related to the Artistic & Creative Segment of the music ecosystem<sup>78</sup> represented 22% (\$92.5 million) of the direct output of the music sector, while Professional & Support activities comprised 78% (\$322 million). Of the total direct employment created by the music ecosystem, 75% (2,968) exists in the Professional & Supporting segment, while 25% (993) exists in the Artistic & Creative segment (see figure 4).



The Professional & Supporting Segment can be analyzed in detail by breaking it down by sub segments (Live Music<sup>79</sup>, Recording Industry<sup>80</sup> and Other Supporting Activities<sup>81</sup>). These sub-segments contribute to the direct output of the Professional & Supporting segment differently. The Other Supporting Activities segment contributed 40% of the direct output of

<sup>78</sup> Artistic segment of the music ecosystem: According to the NAICS 2017, this activity comprises musicians (songwriters, music composers), music groups and performers.

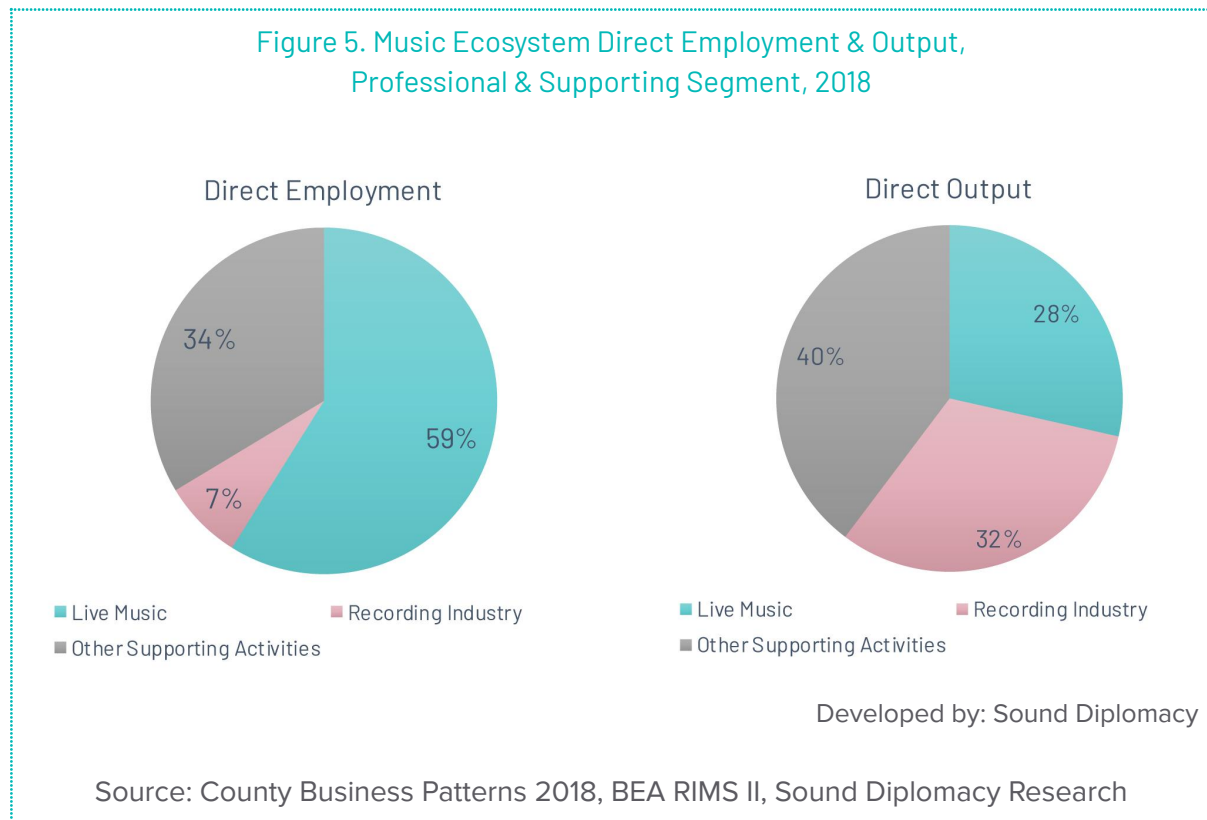
<sup>79</sup> Live Music sub-segment include live music promoters, live music bookers, music venues, cafes, bars and restaurants with music, and nightclubs.

<sup>80</sup> Recording industry sub-segment groups record labels, recording studios, managers and publishers.

<sup>81</sup> Other supporting activities sub-segment groups instruments and equipment retail and manufacturing, radio broadcasting, music education and music media and magazines.

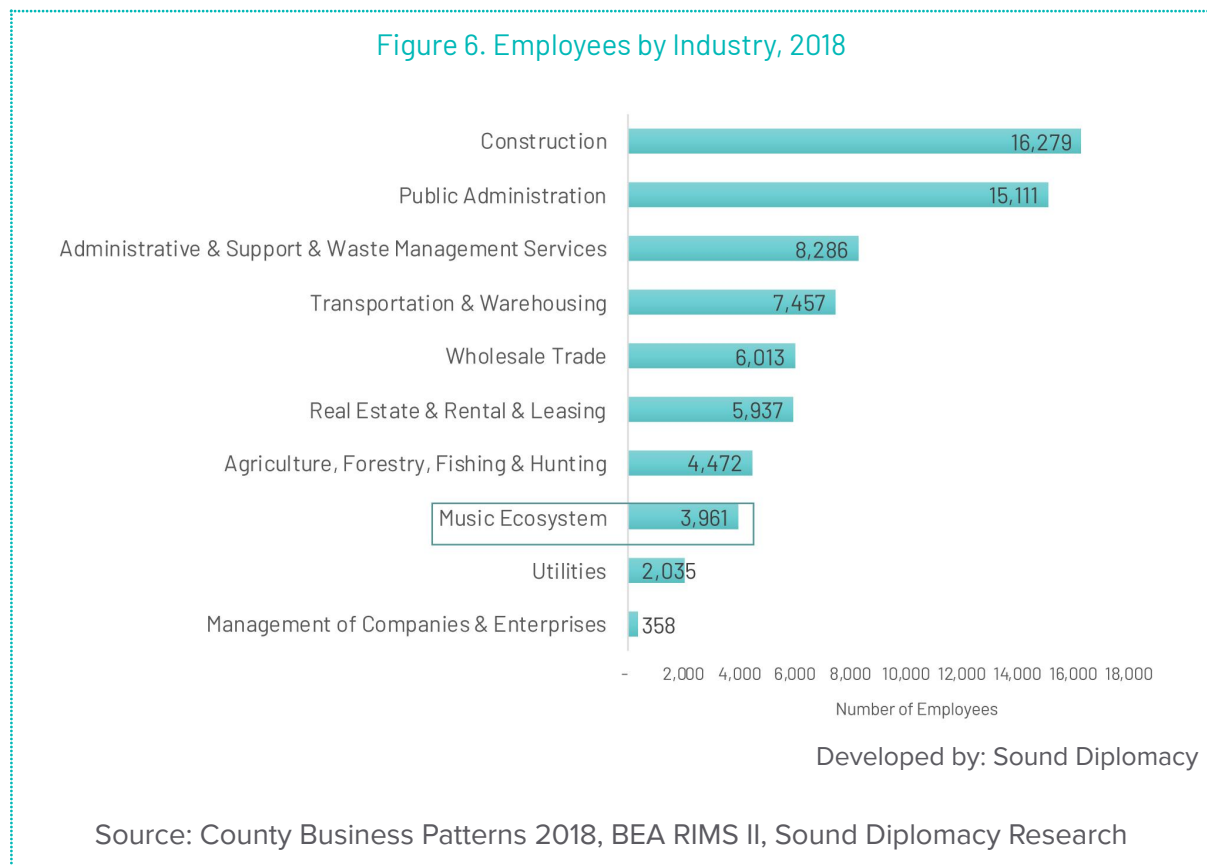
the segment, the Recording Industry sub-segment generated 32% of the segment output, while Live Music contributed only 28% (see Figure 5).

When looking at employment, the number of jobs supported by Live Music appears as the main contributor to the segment, generating around 59% while the Other Supporting Activities generates 34% of jobs and the Recording Industry only 7% of jobs in the segment. These differences are due to the variance in the productive scheme of each one of them: the Live Music sub-segment requires more employees to provide its services (bartenders, roadies, promoters, logistics, etc), while the Recording Industry sub-segment needs fewer employees and more capital investment to provide its services, generating a bigger output. That's why the contribution of the Live Music sub-segment reaches 1,993 jobs, while Recording Industries generates 253 jobs (see figure 5).



To put the level of direct employment in perspective, the direct employment generated by the music ecosystem is compared with other traditional sectors in the county. The direct employment generated by the music ecosystem in 2018 was 3,961 jobs (representing the 1.27% of the workforce in Dane County), whereas traditional sectors such as Construction or Public Administration generated 16,279 jobs and 15,111 respectively. Meanwhile, industries like

Utilities and Management of Companies & Enterprises supported 2,035 and 358 respectively (see Figure 6).



### 2.2.5 Madison’s Music Ecosystem: Average Annual Income

Using the American Community Survey’s (ACS) five-year estimates for 2015 to 2019, we compared the annual average income by economy (music ecosystem versus the rest of the economy) and by segment within the music ecosystem (‘artistic activities’ and ‘supporting activities’). The individuals were classified as part of the music ecosystem or part of the rest of the economy, based on the main economic activity they perform in the labor market (see [Appendix 1.3](#)).<sup>82</sup>

In order to understand the results of the estimates derived from ACS sample, it is relevant to describe the individuals based on several variables: sex, age, race, where they were born,

<sup>82</sup> The geographical area in scope is Dane County. The information about annual average income for this scope is obtained by selecting the counties as per their categorization in the Public Use Microdata Areas (PUMA), in this case made up from Madison City (Central), Dane County (East) and Dane County (West). This area from hereon is referred to as ‘area’ or ‘area of study’ (see [Appendix 1.4](#)).

level of education attained and class. However, we recognize the ACS sample falls short in reflecting the nature of Dane County's overall racial and ethnic makeup, notably underrepresenting members of Hispanic/Latinx and Native American communities. The available data for ethnicities and races different from white, black, or asian were very low (1.3%) making it difficult to draw representative analysis and conclusions regarding members of other ethnic and racial categories. More representative data is needed to truly understand the ways that people of varying races and ethnicities contribute to Dane County's music ecosystem.

Based on the classification mentioned above (individuals as part of the music ecosystem or as part of the rest of the economy) of the ACS data, the workforce within Dane County's music ecosystem is mainly composed of women (54.5%) following the opposite pattern as the rest of the economy (48.9% female). If we dissect it by segment within the music ecosystem, people working in 'artistic activities' are mainly men (57.6%) while the people working in 'supporting activities' are mainly women (57.8%).

Moreover, within the music ecosystem, there is a higher proportion of men occupying managerial positions than women. On average, 54.2% of managerial roles are occupied by men. Similarly, the rest of the economy has a higher proportion of men (60.1%) occupying managerial positions and the remaining 39.9% is occupied by women.

With regards to age, the mean age of workers in the music ecosystem is 38.4 years old, which is slightly lower than workers in the rest of the economy in the area (40.6 years old). This average is slightly higher for the 'artistic' workers in the music ecosystem (43.5 years old) and slightly lower for 'supporting activities' (37 years old).

Figure 7 shows that in general, race diversity in the area's music ecosystem workers is concentrated in self-defined White people, some Asian and some Black/African American. There is a more accentuated proportion of White workers in the rest of the economy (85.8%) than in the music ecosystem (77.2%). Deep diving into the music ecosystem, the 'artistic activities' segment is more diverse with 15.8% self-declared Asians and 10% Black/African American.

Within the music ecosystem, most of the managers are White (70.8%), followed by 29.1% of Asian managers. However, based on the sampling from the ACS, no managers in the music ecosystem that are Black/African American were identified, nor were workers from other races. Such distribution of managerial roles, according to races, is similar in the rest of the local economy, however, it is more diverse, with 92.2% of managers being White, 1.9% Black/African American, 3.9% Asian and 1.7% from other races.

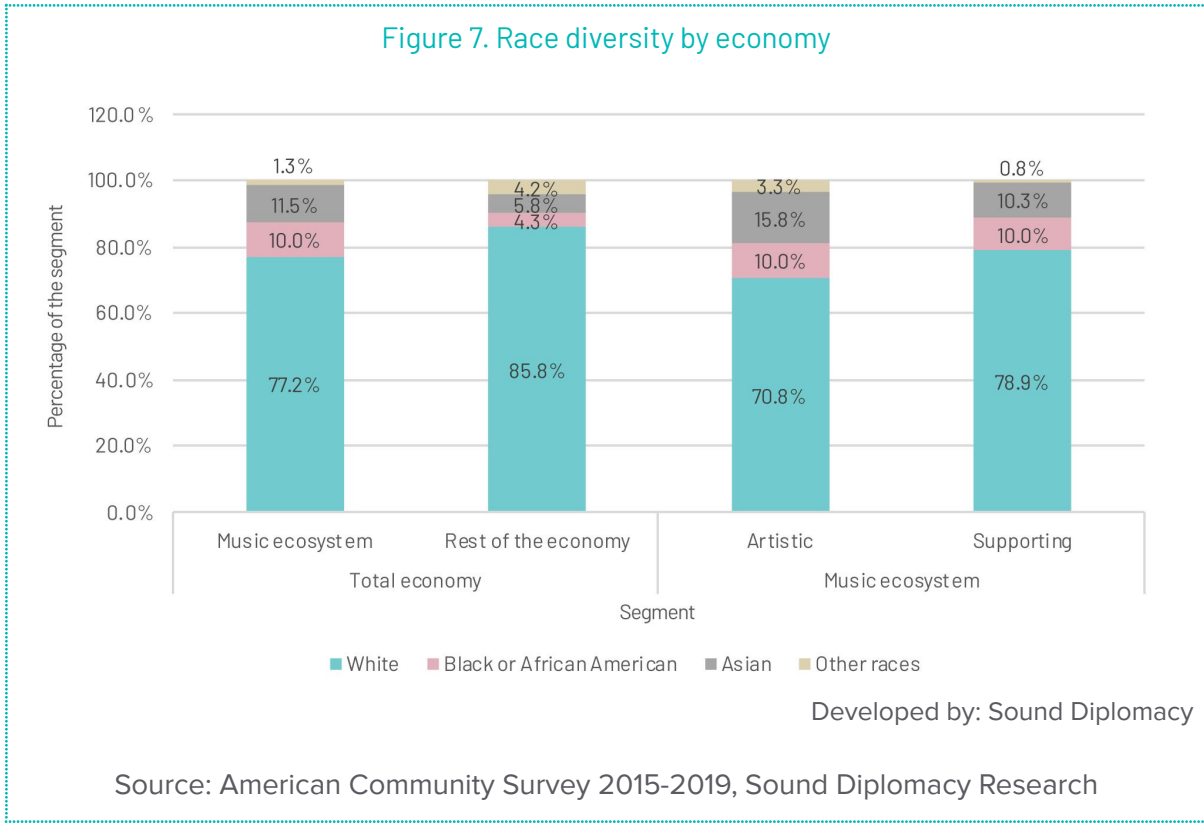


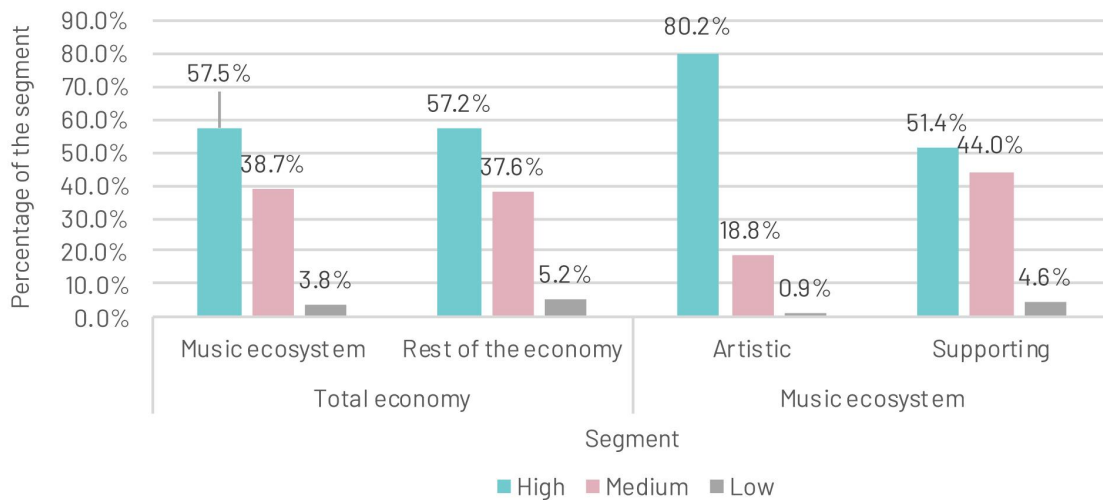
Figure 8 shows that the maximum level of education attained<sup>83</sup> in the music ecosystem in the area is mostly high (57.5%), followed by a medium level of education (38.7%), where the remaining 3.8% of workers in the segment attained low levels of education. For the rest of the economy there is a similar distribution.

Within the music ecosystem, the ‘artistic activities’ segment is in its majority highly educated (80.2%), 18,8% with medium level education and with the lowest proportion of low education level workers (0.9%). In contrast, the ‘supporting activities’ segment has a more similar distribution amongst high and medium level of education.

<sup>83</sup> Higher education consists of workers that have attained: associate’s degree, bachelor’s degree, master’s degree, professional degree beyond a bachelor’s degree and doctorate degree. Medium education considers workers that have attained: regular high school diploma, GED or alternative credential, some college but less than one year, one or more years of college credit with no degree. Basic education consists of workers that have attained a maximum level of education of 12th grade with no diploma or any lower grade.



Figure 8. Education Level by Economy



Developed by: Sound Diplomacy

Source: American Community Survey 2015-2019, Sound Diplomacy Research

The majority of workers (54.9%) in the area’s music ecosystem are employees of a private for-profit business.<sup>84</sup> This also occurs in the rest of the economy (61%). However there are some differences particularly with regards to self-employment. The 14.9% of the music ecosystem is made up of self-employed people in their own not incorporated business, whilst only 3.9% of the rest of the economy fall under this category. This indicates a higher vulnerability in the music ecosystem since freelancers assume higher risks and costs in comparison to employees.

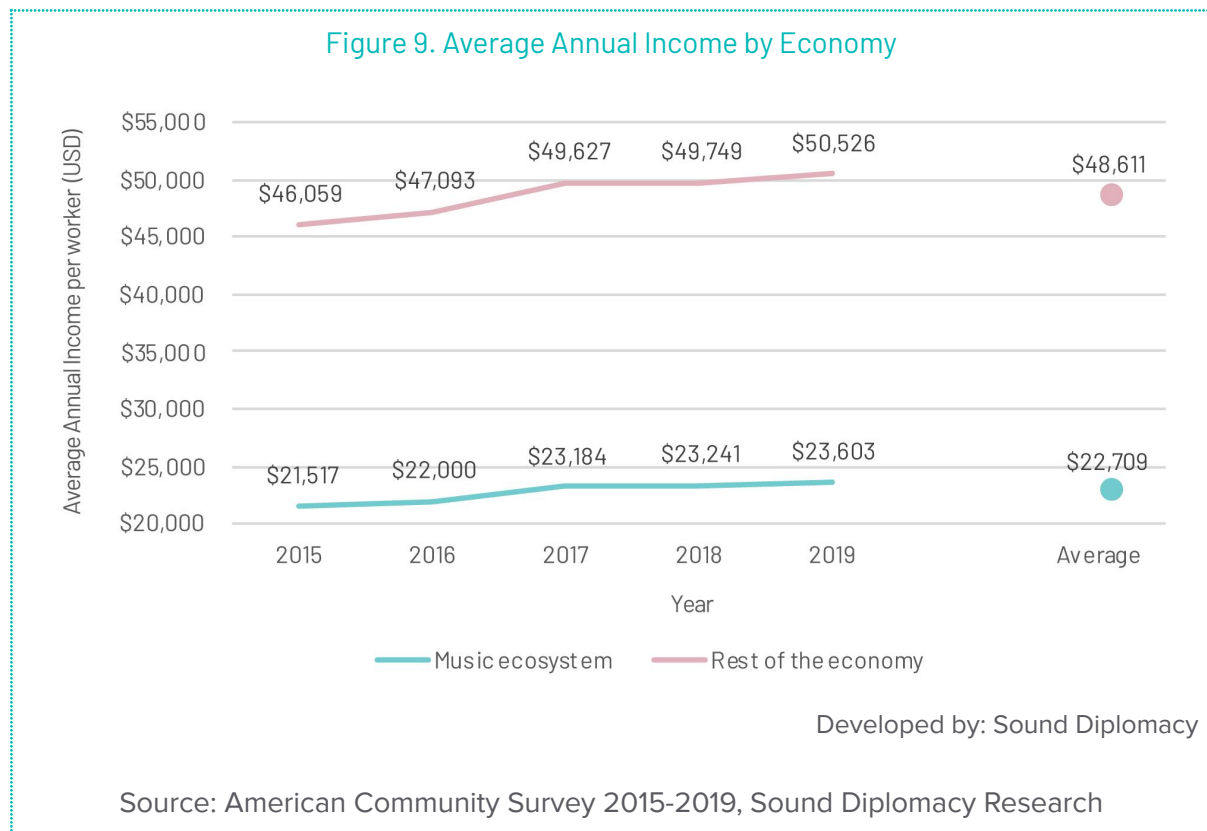
This type of work structure (self-employed) is more visible in the segment of ‘artistic activities’. Within this segment, the proportion of self-employed people in their own unincorporated business is 26.7%, compared to 11.7% within the supporting activities.

Figure 9 presents the annual average income per worker over time, comparing the music ecosystem to the rest of the economy. Both economies show a substantial difference in their average income, with the rest of the economy earning \$25,902 more on average than the workers in the music ecosystem per year (114% more).<sup>85</sup> The vulnerability of the music

<sup>84</sup> In ACS the complete description is ‘private for-profit company or business of an individual, for wages, salary, or commissions’.

<sup>85</sup> The average annual income for the music ecosystem, obtained from the American Community Survey, had a high volatility, where the annual income from one year to another changed drastically (either increased or decreased significantly). The high volatility could be associated with the reduced sample in ACS for the specific

ecosystem, due to the high proportion of self-employment, is accentuated by the relatively low income of the workers. This creates a higher precariousness for the workers of the ecosystem.



Based on the same dataset from ACS, we calculated the average income for different subpopulations.<sup>86</sup>

Figure 10 shows the average wage for men and women in the music ecosystem and the rest of the economy in the area. Within the music ecosystem, on average women earn 11.5% more than men (\$28K vs \$25K), opposite to what occurs in the rest of the economy, with men earning 34% more than women (\$56K vs. \$41K respectively). On average, men have a lower income in the music ecosystem (\$25k) compared to the income of men in the rest of the economy (\$55k), where the latter earns 122% more than the former. The segment gap is less

geographic delimitation. For this reason, the annual growth of the music ecosystem was adjusted to the growth of the 'Rest of the economy'.

<sup>86</sup> In order to see whether the differences in income are statistically significant or not, we performed linear regressions per subpopulation and performed an adjusted Wald test (shown as  $p = x$  in the text).

steep for women, who earn 48% more in the total economy than women in the music ecosystem (\$41k vs. \$28k, respectively).<sup>87</sup>

It is important to note that there are no known statistics available for non-binary gender representations in the music ecosystem.

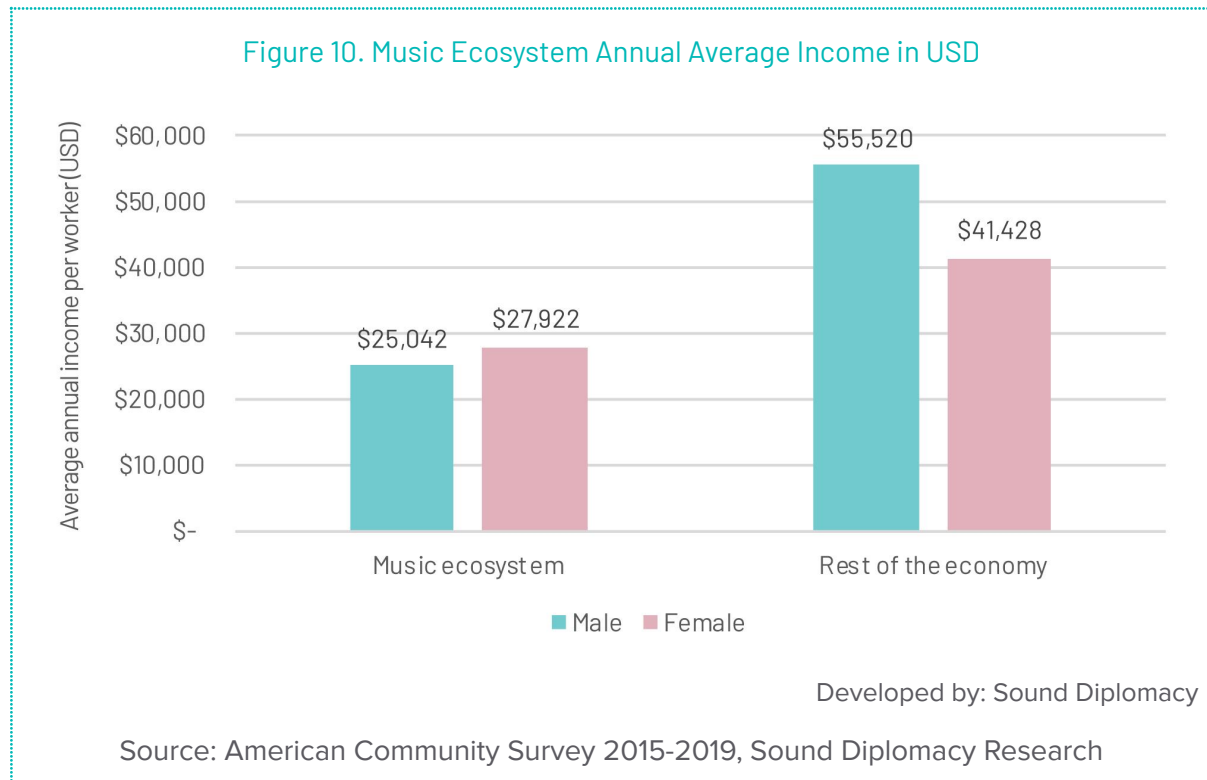


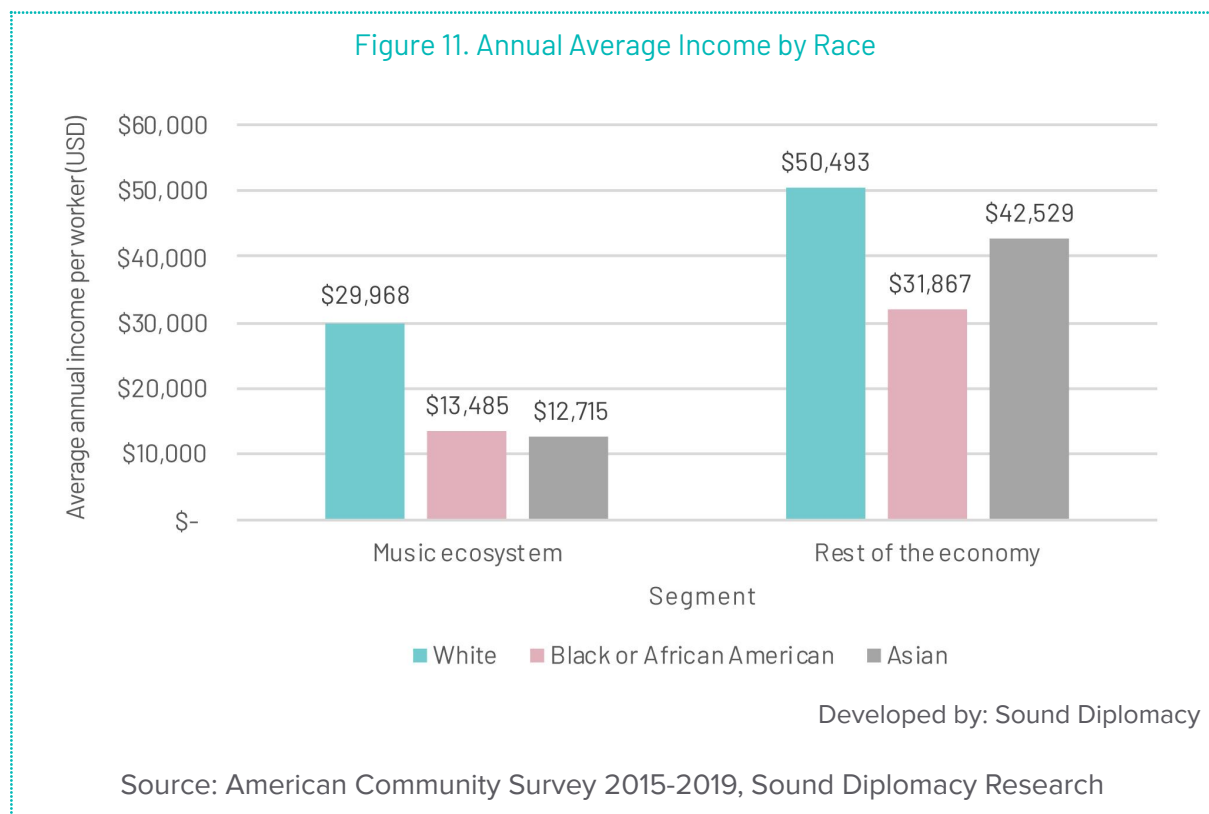
Figure 11 displays the average income by race in the area’s music ecosystem and the rest of the economy (White vs. Black or African American vs. Asians). In both cases, White workers earn more than Black and Asian workers. In the music ecosystem, White-identified workers earn 122% more than Black / African Americans and 136% more than Asian workers. In the rest of the economy White workers earn 58% more than Black / African Americans and 19% more than Asian workers.<sup>88</sup> The observation that Black/African American workers earn more than Asian workers while Asian workers hold more managerial roles is atypical when compared to

<sup>87</sup> Differences between men and women across segments are both significant (p-value = 0.0003 for male and p-value = 0.0003 for female).

<sup>88</sup> Differences of income between White workers and the rest of workers from the music ecosystem is not significant (p-value = 0.0978). However, the differences of income between white workers and the rest of workers from the rest of the economy is significant (p-value = 0.0000).

other comparable studies. The relatively small sample size of the ACS for this specific study could account for the variance.

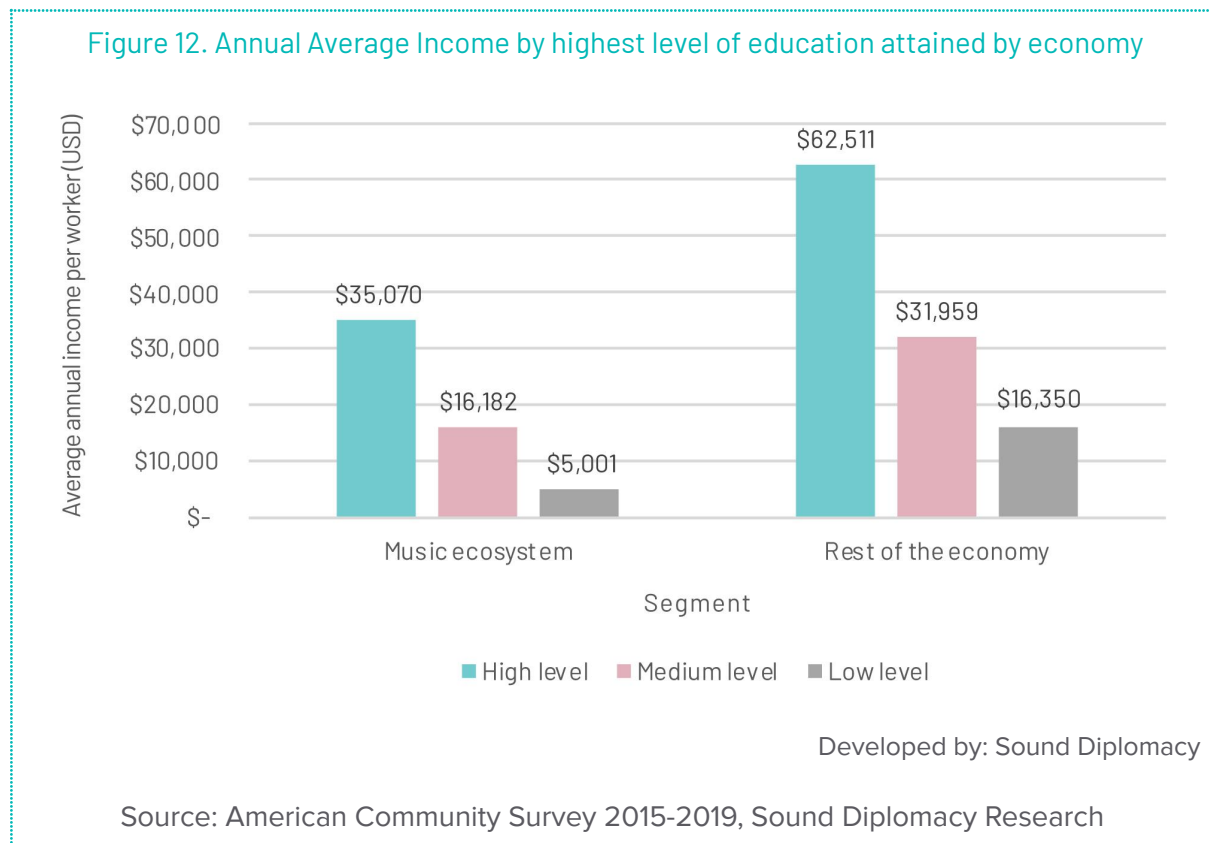
This gap can be further explained by the differences in access to higher-paid positions (ie. managerial). 92% of managerial positions in the rest of the economy are held by White workers, followed by 4%, held by Asians and 2% by Black / African Americans. Similarly, in the music ecosystem white workers concentrate 71% of managerial roles. The data on gender and race found here is atypical compared to studies in other cities. In Dane County Asian workers earn less than African American workers, but Asian workers hold more managerial positions. The data also shows women making more than men, while holding less managerial positions. The limited ACM sample size makes it difficult to draw a definitive conclusion as to why this may be the case. More work needs to be done to accurately reflect the positions and earnings of BIPOC in Dane County’s music ecosystem.



In Figure 12 it is visible that the average income is superior for workers that have a higher education level attained, both in the music ecosystem and in the rest of the economy. In the music ecosystem, highly educated workers earn 117% more than workers with medium level education and six times more (601%) than workers with basic education. In the rest of the

economy workers with higher levels of education earn 96% more than workers with medium level of education and 282% more than workers with basic education.<sup>89</sup>

This shows that the differences in income according to the level of education are more accentuated in the music ecosystem than in the rest of the economy. This could be linked to the income distribution across the workers: there is a higher concentration of workers with lower income ranges in the music ecosystem whereas in the rest of the economy, the workers have a more equitable distribution of income across lower, mid and higher ranges of income.



As a conclusion, the studied area displays an income gap between the music ecosystem and the rest of the economy, where on average the rest of the economy has higher annual income. The gap in income within the music ecosystem is more visible across workers with different types of education levels. The higher educated workers earn significantly more than the workers with medium or basic level of education. Moreover, the music ecosystem is highly informal, with self-employees making up most of the workforce in the area. This informality, as

<sup>89</sup> The differences of income between highly educated workers and the rest of workers both for the music ecosystem and the rest of the economy, are significant (p-value = 0.0000).

previously mentioned, leads to a higher vulnerability which is accentuated in the ‘artistic activities’ segment.

## 2.2.6 Indirect Impact

The indirect economic impact is calculated by looking at the changes in the values of output, employment and compensation driven by suppliers of the music ecosystem. So it represents the jobs and output generated by local businesses that supply goods and services to the Dane County music ecosystem. To calculate it, it is necessary to include the measurement of economic exchanges with suppliers that do not necessarily belong to the music ecosystem, such as advertising, video production, and even legal services, communication and transportation<sup>90</sup>.

In 2018, the indirect economic impact of the music ecosystem in Dane County reached an output of \$86 million and a GVA of \$53 million. The sum of the indirect earnings (compensation) reached \$30 million. At the same time, it is estimated that 660 jobs in Dane County were indirectly supported by the music ecosystem in 2018. Madison concentrates around 83% of the indirect effect generated by the music ecosystem in the County.

To give an idea of the size of the indirect effect of the music sector on the local economy, it was estimated that \$1,000 of output from the music sector is indirectly supporting \$206 of the output of other industries in the city.

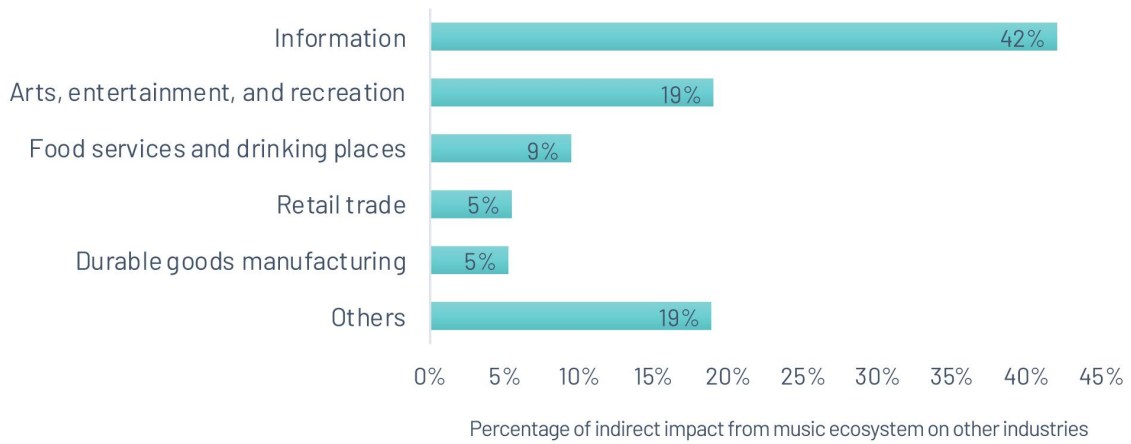
Figure 13 displays the output breakdowns of the industries impacted indirectly by the music ecosystem. It was estimated that 42% (\$36 million) of the indirect output effect of Dane’s music ecosystem impacted the Information sector,<sup>91</sup> 18.98% (\$16.3 million) impacted the Arts, Entertainment, and Recreation sector, 9.45% (\$8.10 million) impacted Food Services and Drinking Places, 5.46% (\$5.09 million) impacted the Retail Trade sector, among other industries.

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<sup>90</sup> This process is carried out using the Type I Multipliers, available in the BEA, RIMS II model for 2018.

<sup>91</sup> The main components of this sector are: the publishing industries, including software; motion picture and sound recording industries; broadcasting industries, telecommunications industries; web search portals, data processing industries, and the information services industries.

Figure 13. Indirect Impact Output Breakdown, 2018<sup>92</sup>



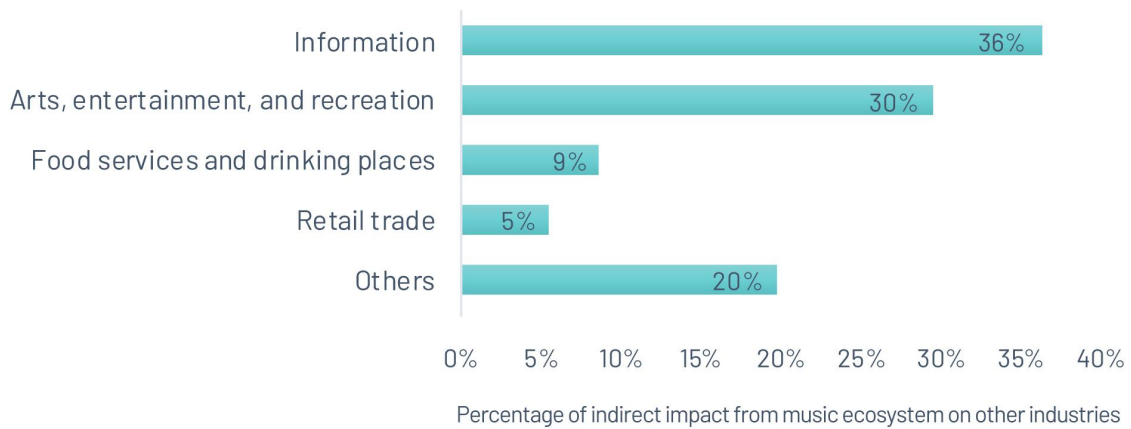
Developed by: Sound Diplomacy

Source: County Business Patterns 2018, BEA RIMS II, Sound Diplomacy Research

When assessing the breakdown of indirect employment, 36% (240 jobs) of the indirect jobs belonged to the Information sector, 30% (195 jobs) to the Arts, Entertainment, and Recreation sector, and 9% (58 jobs) to the Food and Services sector, among other sectors (see figure 14).

<sup>92</sup> Values are rounded up to the nearest whole number. Information represents 42.03%, Arts, entertainment, and recreation accounts for 18.98%, Food services and drinking places is 9.45%, Retail trade is 5.46%, Durable goods manufacturing is 5.24% and Others accounts for 18.84%.

Figure 14. Indirect Impact Employment Breakdown, 2017



Developed by: Sound Diplomacy

Source: County Business Patterns 2018, BEA RIMS II, Sound Diplomacy Research

## 2.2.7 Induced Impact

The induced economic impact is the economic value (output, compensation and employment) derived from “the spending of workers whose earnings are affected by a final-demand change, often called the household-spending effect.”<sup>93</sup> In other words, this impact is derived from the spending of workers whose wages are supported directly and indirectly by the Dane County music ecosystem. This includes, for example, the money they spent on services, food, entertainment, transportation, etc. The induced output of the music ecosystem in the region reached \$136 million, a GVA of \$83 million in 2018, and supported 1,170 jobs, with a compensation of \$44 million. The data shows that \$1,000 of the music ecosystem output is generating an induced effect of \$326 on different industries of the economy.

<sup>93</sup> RIMS II: An essential tool for regional developers and planners, page 53.



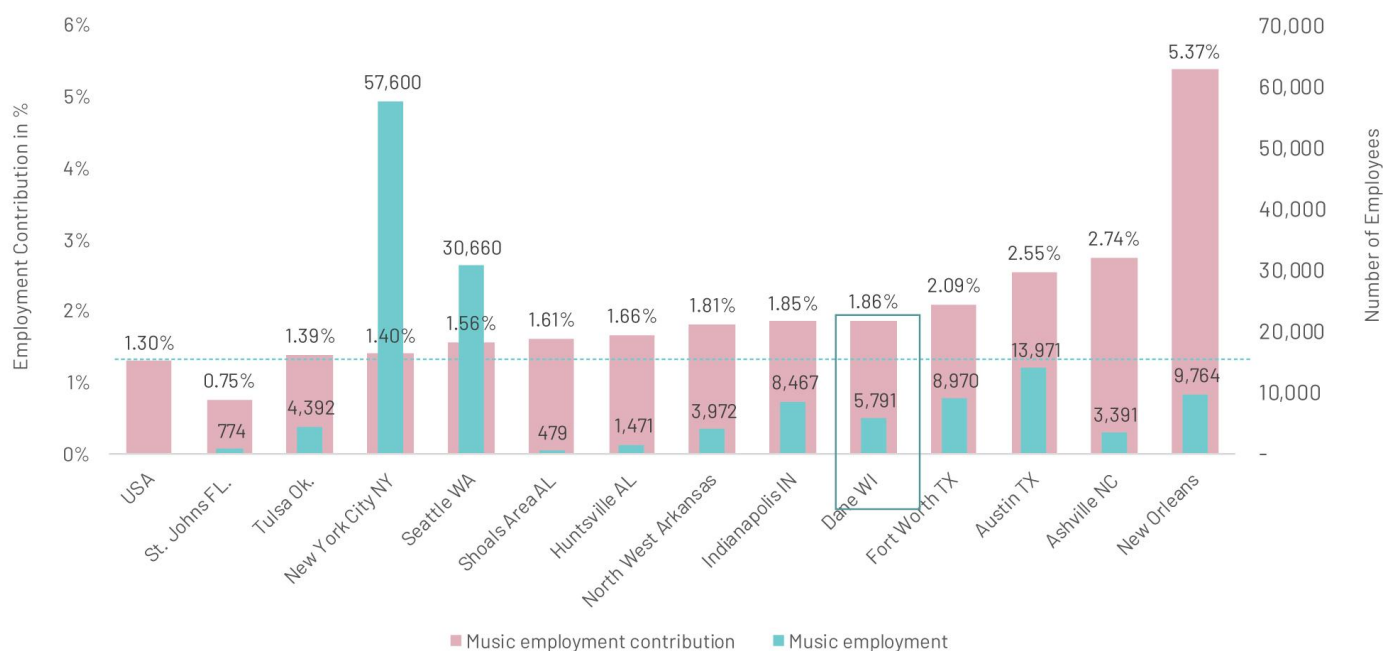
## 2.2.8 Madison In Comparison

### 2.2.8.1 Contribution to Local Employment

A variable that allows for comparing the development of the music ecosystem in different cities is the contribution of music employment to the local economy. This variable is represented in figure 15 for cities that also have music economic impact reports.<sup>94</sup>

In the case of Madison, the music sector supports 1.89% of the city's employment, more than the national average contribution of music to national employment (1.3%). Madison ranks below other places with a strong music industry tradition, such as Austin or New Orleans, where the music sector supports 2.55% and 5.37% of the local employment respectively.

Figure 15. Music Ecosystem Total Employment, US Cities



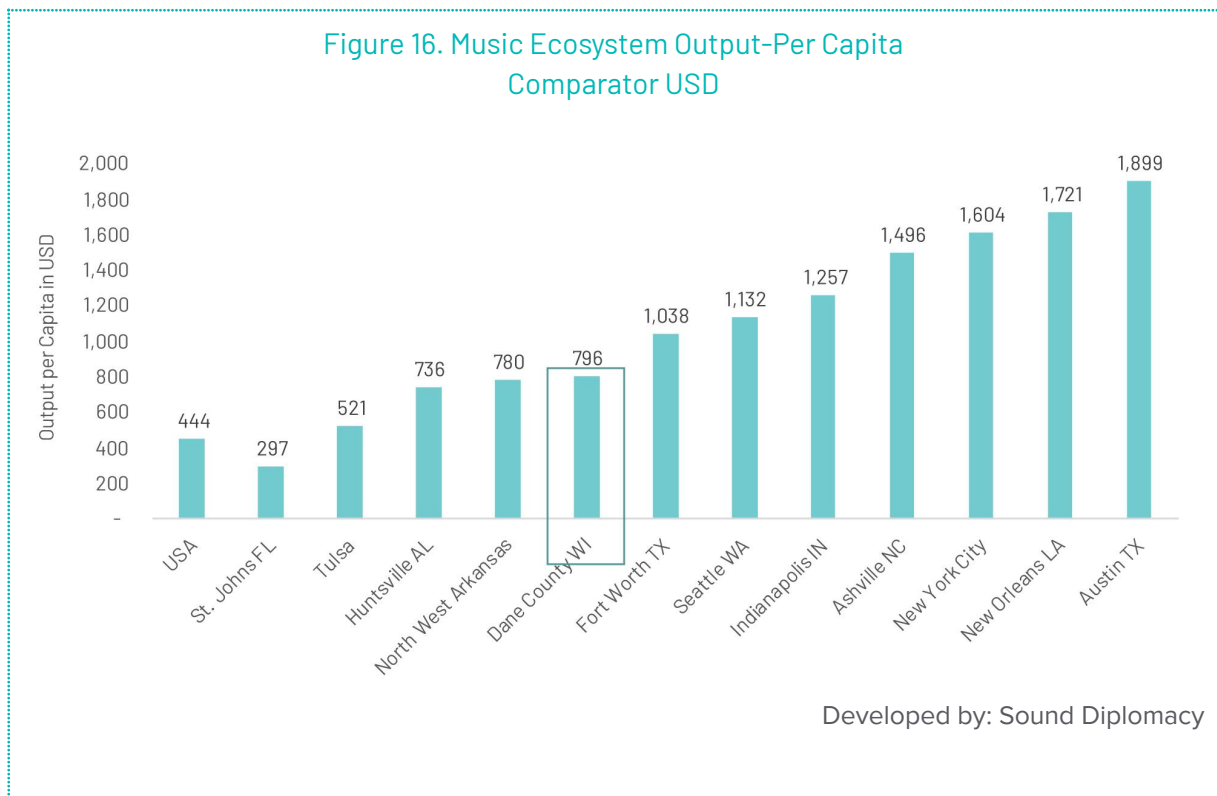
Developed by: Sound Diplomacy

<sup>94</sup> The figures in the graph come from different sources with different methodologies and different years as reference. We use them to compare the dimension of the music sector in different locations. Sources: TXP, Inc. (2016); Asheville Area Chamber of Commerce (2016); The Boston Consulting Group, Inc. (2017); Musicians' Association of Seattle (2015); and Siwek, Stephen E. (2018).

### 2.2.8.2 Music Output Per Capita

Another variable that allows for comparing the level of industrial development of local music ecosystems is the music output per capita since it represents the economic resources generated in relation to the size of the population of a city, county or region. This variable is calculated by dividing the output of the music sector by the total number of residents in each of the locations that also have music economic impact reports.

The music output per capita of the United States is \$444, while in Madison this figure reaches approximately \$796. In cities such as Austin, New Orleans and New York, which have high flows of music tourism and strongly consolidated industries, this figure is \$1,899, \$1,721 and \$1,604, respectively (see figure 16).

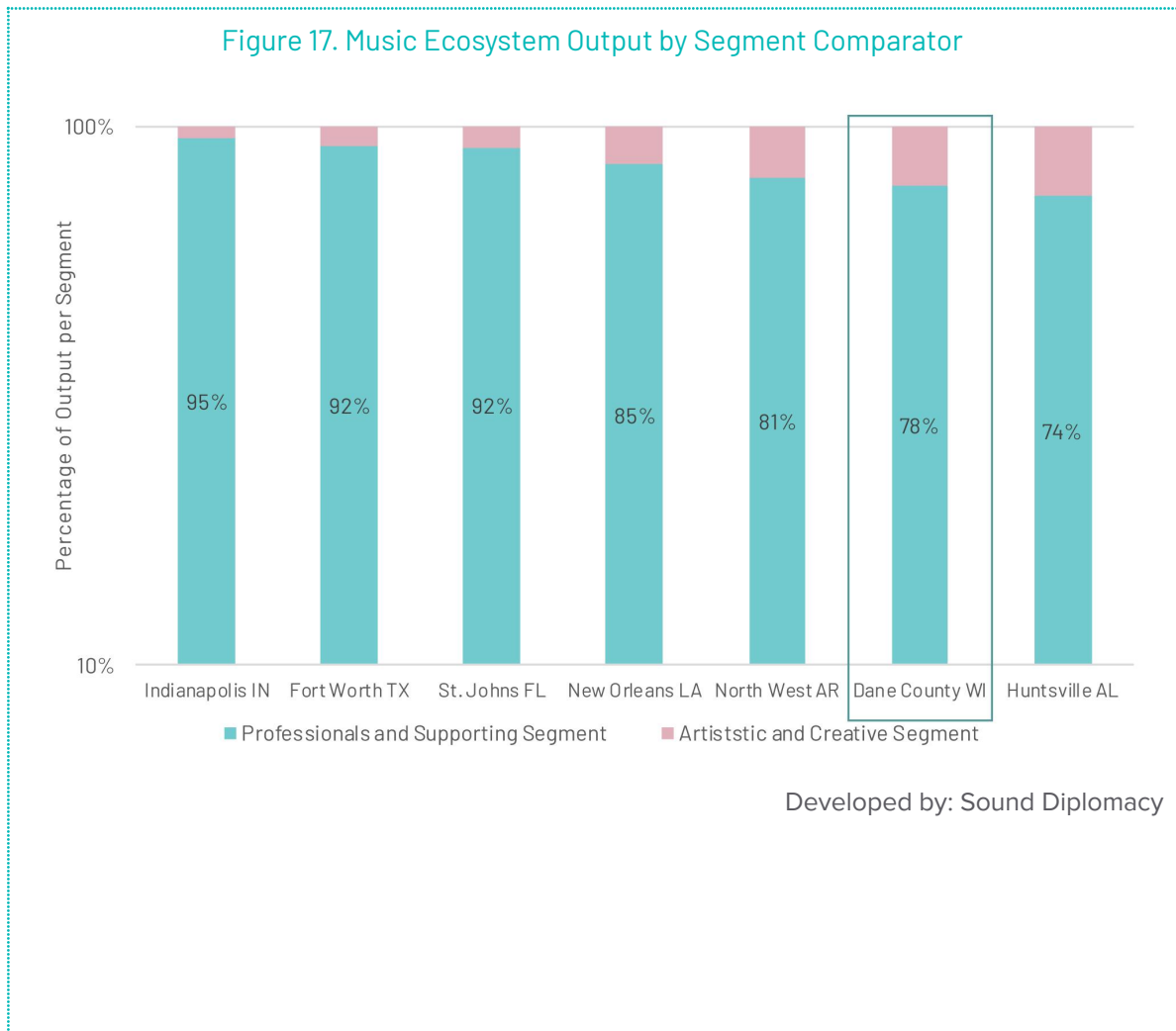


### 3.2.7.3 Music Ecosystem Output per Segment

When looking at the music ecosystem output contribution per segment of these local ecosystems, we found that the Artistic & Creative segment in Dane has a relatively higher

contribution to the overall music ecosystem than other cities previously studied by Sound Diplomacy.

In Madison, the contribution of the Artistic & Creative segment to the music ecosystem output is 22%, while in cities such as Huntsville AL or New Orleans LA this figure reaches 26% and 15%, respectively (see figure 17). This figure reflects a wide participation of artists and creatives in the County, compared to other cities or areas.



### 2.2.8.3 Music Ecosystem Establishments

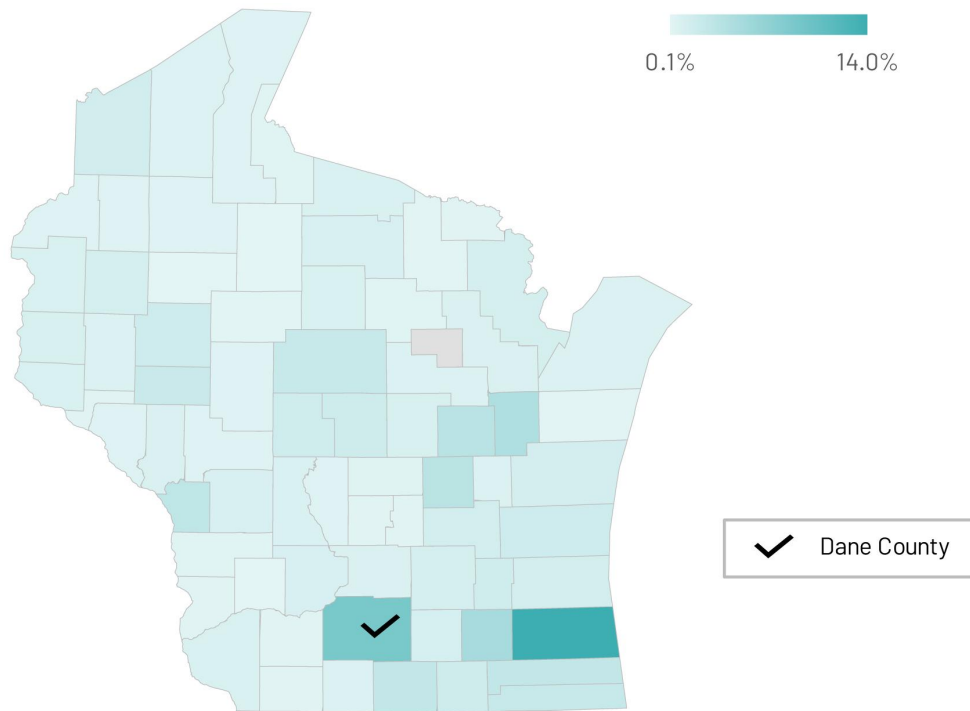
Map 1 shows the percentage of the total number of music ecosystem establishments in the state of Wisconsin, according to the County Business Pattern 2018.<sup>95</sup> The darker the color of the area, the higher the percentage of establishments in the specific County, within the total establishments in the state. For the gray colored counties there is no data available.

Out of the 71 counties in Wisconsin, with available data, Dane County ranks number 2, having 10.5% of the total music ecosystem establishments in the state. The number one county is Milwaukee County, with 14% of the music ecosystem establishments in the State. The counties that follow Dane are Waukesha County (6.3%), Brown County (4.5%) and Outagamie County (3.3%). From the top 3, we can see a high concentration of establishments in the counties in the southern part of the state, making this the state's biggest music cluster.

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<sup>95</sup> County Business Pattern is an official source of information, however it does not include some establishments that might be classified in the incorrect NAICS (standard to classify economic business activity). To offset the gap, Sound Diplomacy performed a mapping of establishments.

Map 1. Percentage of the Total Music Ecosystem establishments in Wisconsin, per County, 2018<sup>96</sup>



Developed by: Sound Diplomacy

Source: County Business Patterns 2018, Sound Diplomacy Research

It is also important to understand such distribution by relativizing it with the population per county. In many cases, a bigger state in size (population) could be expected to have more establishments than a smaller state. However, this doesn't provide insights on the availability of such establishments per individual, meaning, how many establishments are in the county, per person. The more establishments per person, the more availability. This availability can be measured by calculating the number of establishments that are in the county, per inhabitant.<sup>97</sup>

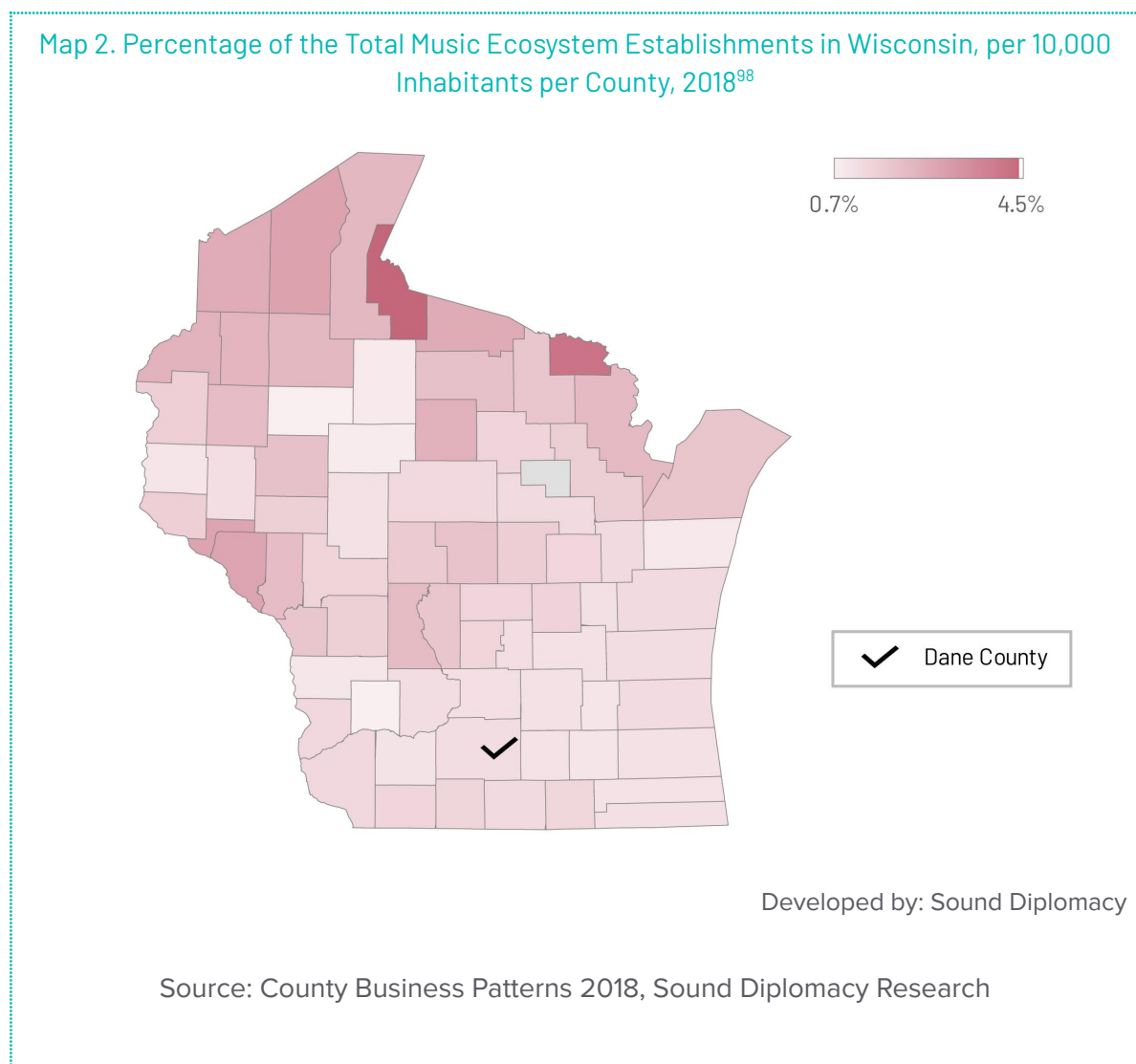
When looking at the total number of establishments per 10,000 county inhabitants, the distribution of establishments in the music ecosystem shows a different cluster. Instead of

<sup>96</sup> Source: County Business Patterns (CBP), 2018

<sup>97</sup> In this case, the availability is measured per 10,000 inhabitants.

being located in the south, it is visible that the north of the county has more availability per inhabitant. Using this indicator, Dane County is no longer among the top five counties, being now in the 27th position and concentrating only 1.3% of the establishments in Wisconsin per 10,000 inhabitants. In this case, Vilas County is the lead, concentrating 4.5% of the establishments in the state, per 10,000 inhabitants. Others in the top 5 are Door County (4.5%), Sawyer County (3.7%), Iron County (3.2%) and Bayfield County (3%). See Map 2.

None of the counties in Wisconsin appear in both rankings from Map 1 and Map 2. This shows that Dane County, while concentrating a high percentage of music ecosystem establishments within Wisconsin, has room for growth that can mirror the supply of other counties in the north of the state.



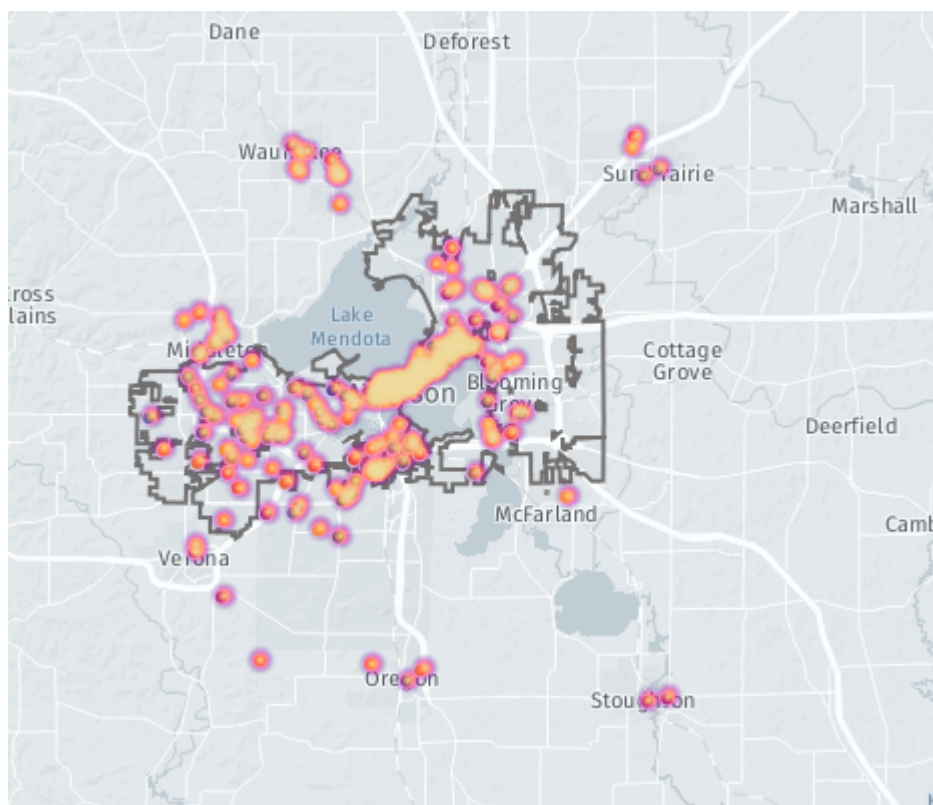
<sup>98</sup> Source: County Business Patterns (CBP), 2018

## 2.3 Music Asset Mapping

The mapping was produced using a database provided by The Greater Madison Music City Project and georeferenced with Sound Diplomacy's proprietary mapping tool. Moreover, the music assets were cross-referenced with the Aldermanic Districts, in the City of Madison and the rest of the territory of Dane County.

### 2.3.1 Interactive Music Asset Map

The categories listed below have been mapped on this [Interactive Map](#) tool developed specifically for Madison. On this zoomable tool, users can see a heat map of assets, Aldermanic District boundaries, city and county boundaries, and click on individual assets to see more information about each one. Each asset category is color-coded and can be singled-out or aggregated for a wider view.



The interactive map can be filtered by asset category, clicking on the category name in the menu on the right. If you want to filter categories that do not appear on that menu (grouped as

“other”), please click on "search in 14 categories" and then type the name of the category you want to filter, it is also possible to filter several categories simultaneously.

The interactive map contains three types of heat maps and each of them can be activated on the check box:

- Cluster Heat Map: This is a visual aid that shows the clusters or groups of assets across the map.
- Aldermanic District Heat Map: Shows the concentration of assets by Aldermanic District, the darker the blue, the higher the concentration of assets in the Aldermanic District.
- Aldermanic District Density Map: Shows the concentration of assets per square Miles of each Aldermanic District. This allows us to compare the density in the districts regardless of their size, the darker the red, the higher the concentration of assets in the Aldermanic District based on its size.

The interactive map also contains a Zoning Map, in which the areas of Madison can be delimited according to its land usage groups.<sup>99</sup>

- Group 1: The zoning districts in Group 1 include all zoning districts classified as Residential, and the Agricultural (A), Urban Agricultural (UA), Campus Institutional (CI) and Conservancy (CN) districts.
- Group 2: This group includes the neighborhood-serving commercial uses, pedestrian-oriented corridors, smaller-scale development and park and recreation areas.
- Group 3: The zoning districts include higher-volume motor vehicle transportation corridors, larger-scale development, and primarily auto-oriented commercial and employment uses.
- Group 4: Zoning Districts not listed in Groups 1, 2 or 3 are addressed as Districts of Special Control for Purposes of Signs by Madison Code of Ordinances.

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<sup>99</sup> City of Madison (n.d.) "Madison, Wisconsin - Code of Ordinances / Chapter 31 - Sign Control Ordinance". Online at [https://library.municode.com/wi/madison/codes/code\\_of\\_ordinances?nodeId=COORMAWIVOIIICH20--31\\_CH31SIC\\_OOR](https://library.municode.com/wi/madison/codes/code_of_ordinances?nodeId=COORMAWIVOIIICH20--31_CH31SIC_OOR) accessed 30-06-2022



## 2.3.2 Music Asset Definitions

### Venues

- Arenas - large capacity venues (over 2,000 seats) that primarily host sports and live music
- Art venues with music - galleries, museums and other 'art' spaces that occasionally host live music
- Bars, cafés, restaurants with music - establishments where live music is performed regularly although their prime function is the sale of food and beverages
- Dedicated live music venues - establishments where live music performance is the main focus and with dedicated live music programming
- Multi-purpose venues - venues for hire, performing art theaters, corporate event spaces, smaller sports facilities that host music at least two times a year
- Nightclubs - nightlife establishments with regular DJ nights and occasional live music performances

### Music Business

- Artist development, live production - organizations that present and/or produce artistic performances and events
- Music PR & marketing - registered, tax-paying businesses working in music marketing and social media
- Consulting, other music businesses, publishing, law - individual music companies ranging from accounting or content creation, to photography, event production, sync, publishing and licensing
- Dance companies and other music businesses
- Music associations and nonprofits - associations of artists and/or music industry, music nonprofits and charities, based out of Dane County
- Booking & promotion - registered, tax-paying businesses working in music talent booking and event promotion
- Record labels - music labels with physical presence in Dane County

Festivals - ticketed or free to attend special events and concert series focusing on, or featuring live music programs and happening over one or multiple days

Orchestras & Choirs - professional and community bands and orchestras, professional and community choirs and singing groups, including church choirs

Music Education - public and private music schools

Radio stations - public, community and commercial music radio stations

Record and equipment stores - music instruments, equipment and record stores, including rentals

Publication & news paper - publications, magazines and periodicals specialized in music based out of Dane County

Recording studios & rehearsal rooms - registered, music and audio studios offering music recording, mastering and rehearsal services

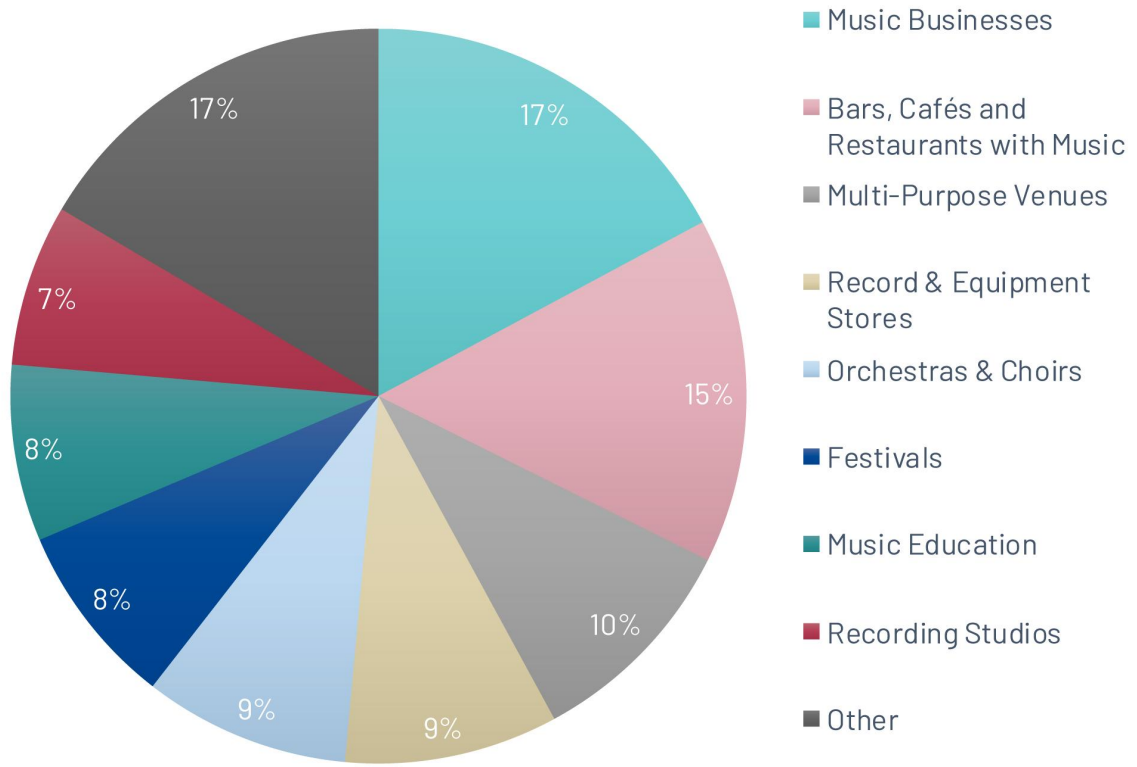
### 2.3.3 Overview of Music Assets in Dane County and City of Madison

According to the mapping and geo-referencing exercise, there are 309 music assets in Dane County. Of these assets, 236 (76%) are located in the City of Madison, which consists of 20 Aldermanic districts and the Town of Madison. The remaining 24% are located outside of the City of Madison but are in Dane County. Music business is the category with the highest number of observations within Dane County with 53 (17%) assets mapped. There are 34 of these establishments located in the City of Madison. The second category with the most presence in the county is Bars, Cafés and Restaurants with Music, that reaches 47 (15%) assets, with 38 located in the City of Madison. Of the assets mapped, 80% are concentrated in the eight categories listed in figure 18.<sup>100</sup>

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<sup>100</sup> Other: Includes Music Radio Stations, Publications & Newspapers, Dedicated Live Music Venues, Night Clubs, Arenas, Art Venues with Music.

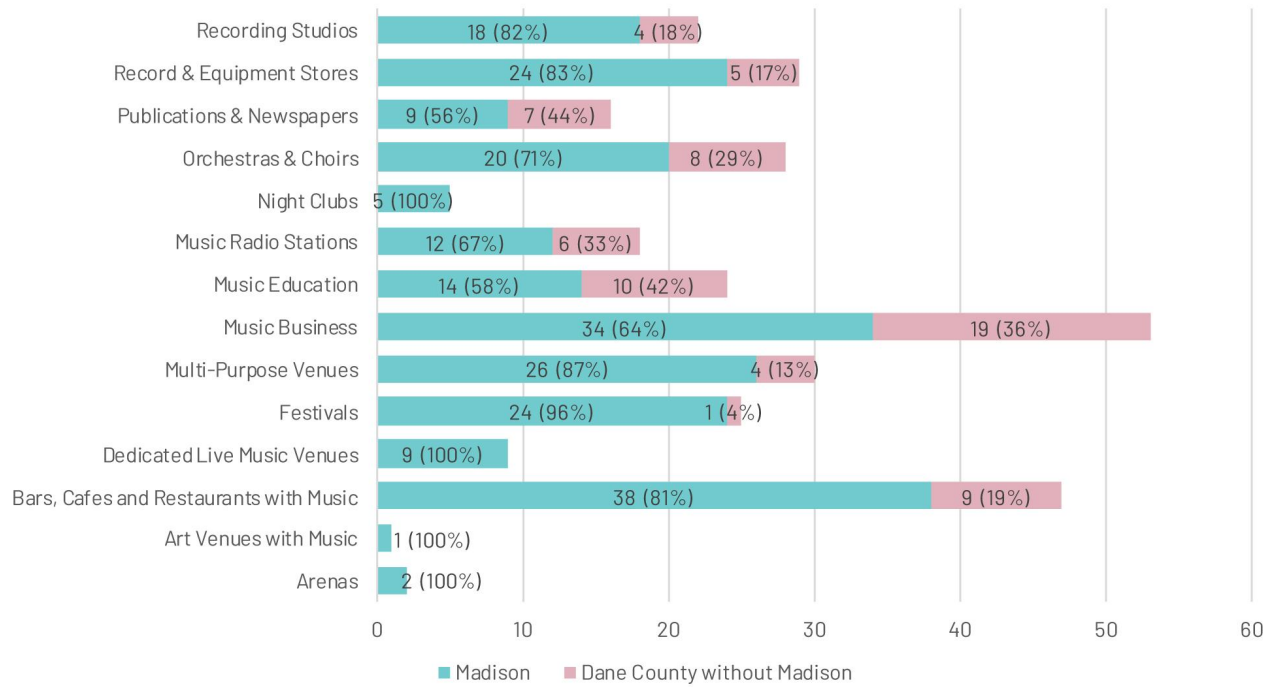
Figure 18. Distribution of Music Assets by Category in Dane County



Developed by: Sound Diplomacy

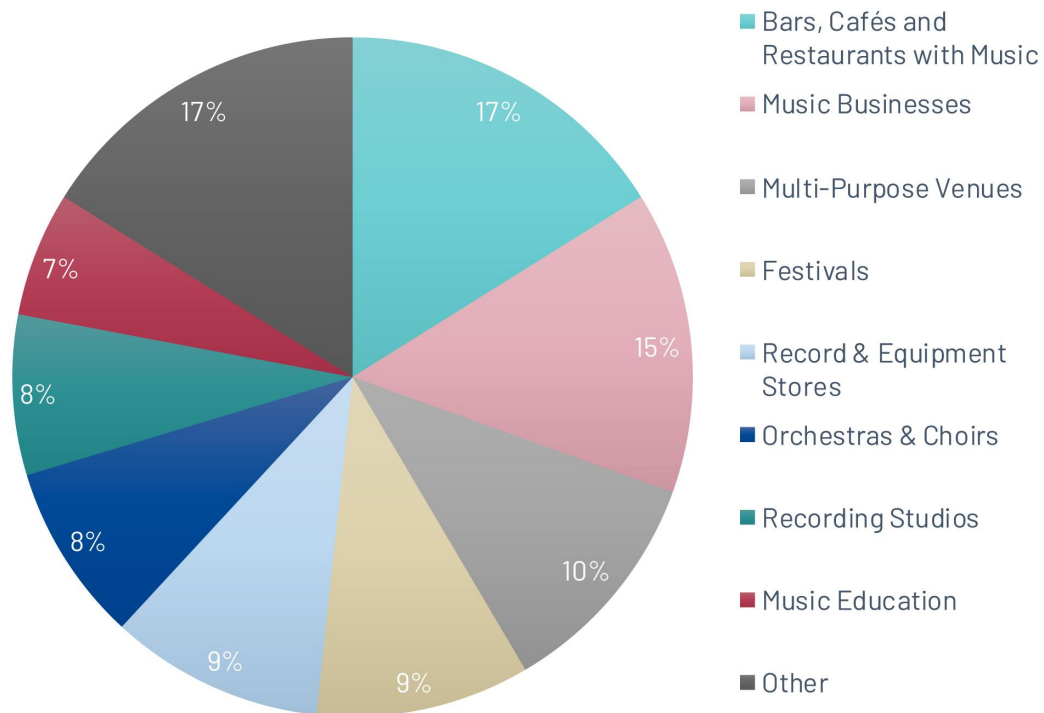
Figure 19. shows the concentration of the music assets in Dane County and the City of Madison. In all categories, Madison has the highest number of assets in the County. However, the “Music Education” and “Publications & Newspapers” assets are distributed more evenly amongst Dane County and the City of Madison.

Figure 19. Overview of Music Assets in Dane County and City of Madison



Developed by: Sound Diplomacy

Figure 20. Distribution of Music Assets by Category in Madison



Developed by: Sound Diplomacy

When focusing on the City of Madison, it is found that the distribution of assets is similar to the one of Dane County, with the same categories accounting for 80% of the assets. However, the top eight categories<sup>101</sup> have a more uniform distribution than the county as a whole and the top category changed from Music Business to Bars Cafés and Restaurants with Music, representing 17% in both cases (see Figure 20).

<sup>101</sup> Other: Includes Music Radio Stations, Publications & Newspapers, Dedicated Live Music Venues, Night Clubs, Arenas, Art Venues with Music.

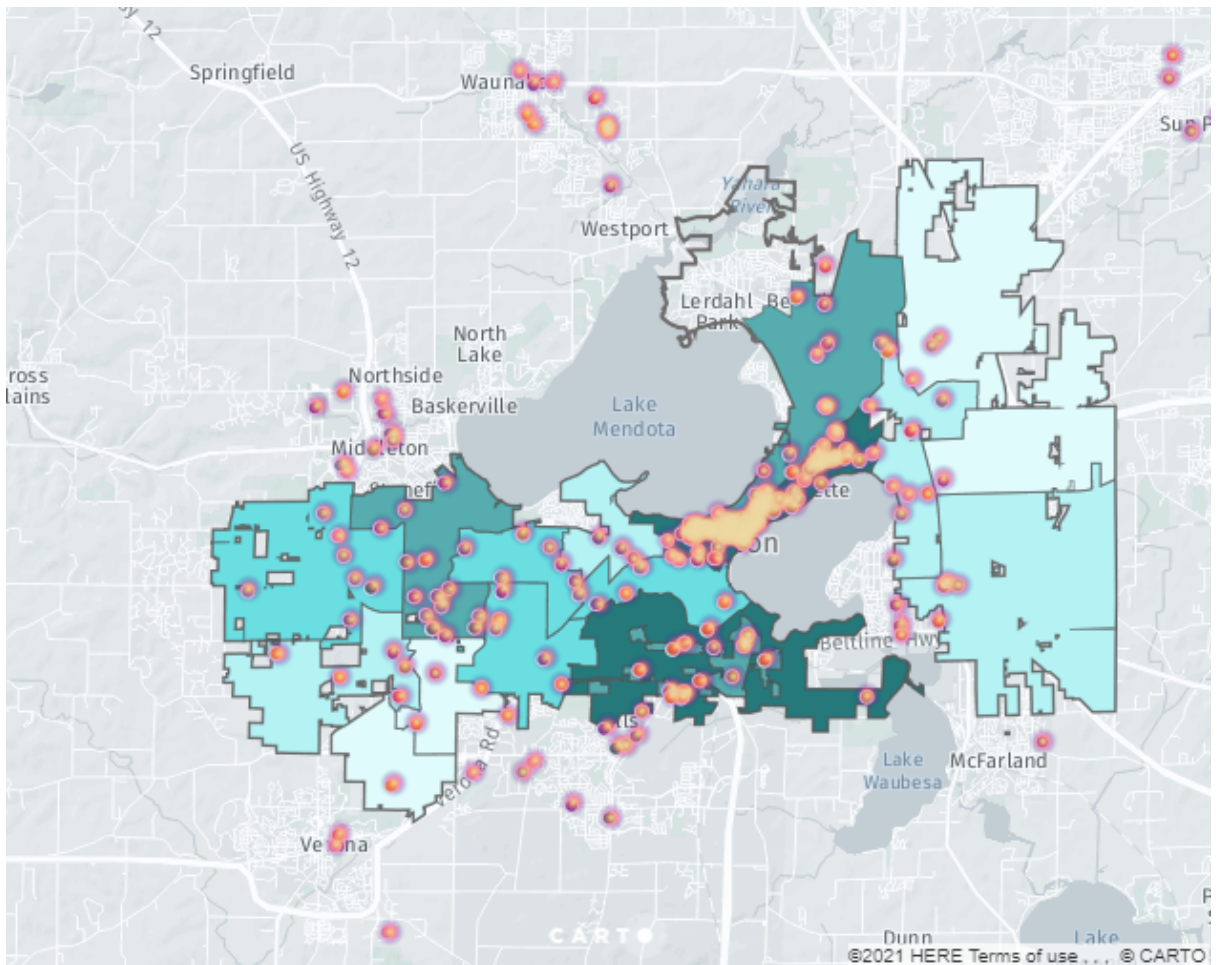
### 2.3.4 Spatial Distribution and Clusters of Music Assets in the City of Madison

According to our geolocation exercise, it was found that the spatial distribution of the music assets is the following (see Map 3, and [Interactive Map](#)):

- Of all music assets located in the City of Madison, 80% are concentrated in nine Aldermanic districts (out of 20 Aldermanic districts)
- Only two of the nine Aldermanic districts (Districts 4 and 6) concentrate 41% of the total assets in Madison. District 4 covers the Mifflin West, Bassett, and First Settlement areas, while District 6 includes the Marquette, Elmside and Schenk-Atwood neighborhoods)
- District 8 (which includes the State Street and the South Campus area) is the third highest district in concentration of music assets in Madison with 21 assets (8.9%) and it is adjacent to District 4

Below you will find a brief analysis of the categories that have visible patterns of concentration and have some type of spatial concentration.

Map 3. Spatial Distribution of Music Assets in Madison



Developed by: Sound Diplomacy

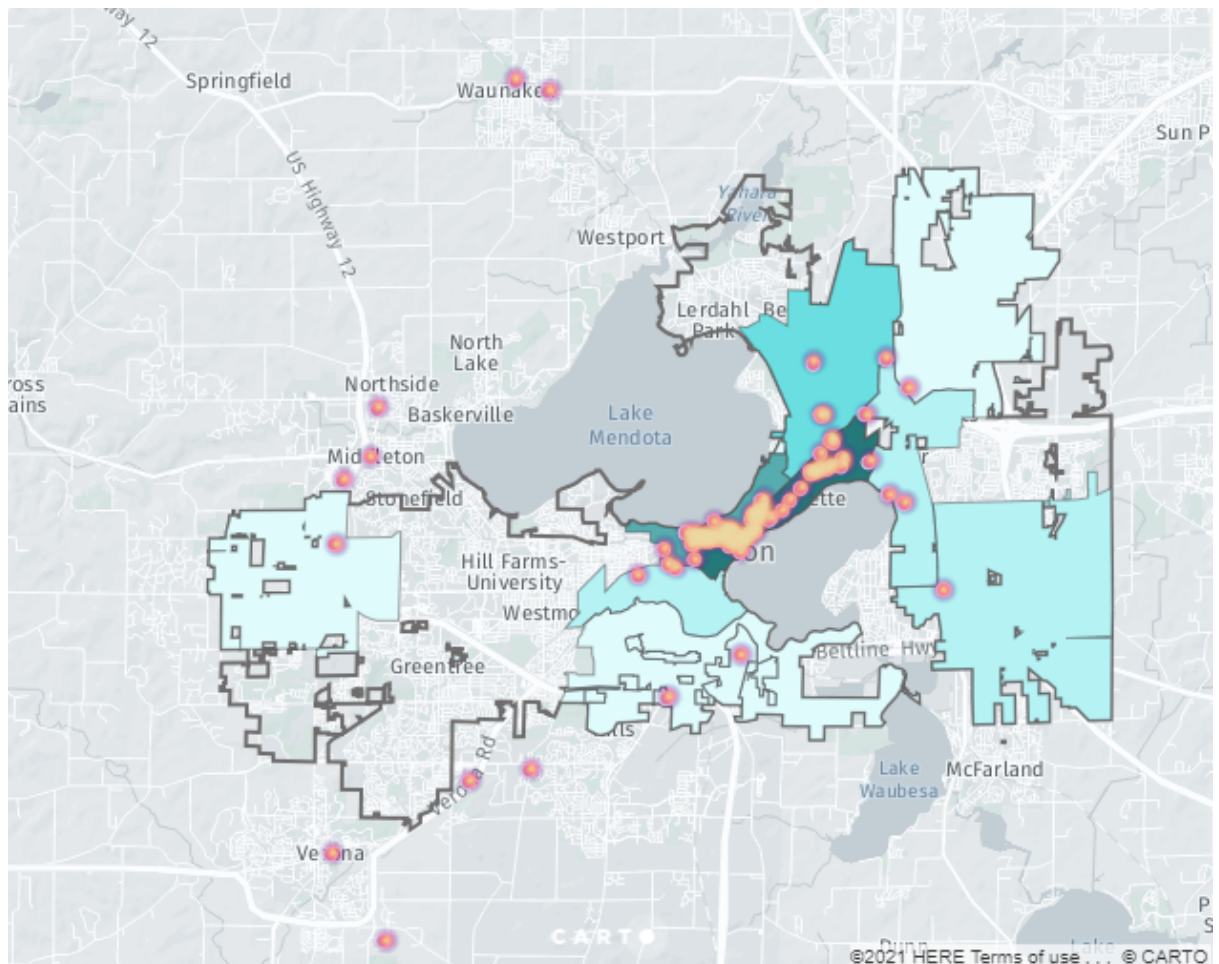
## Venues

When assessing the macro category of venues,<sup>102</sup> a total of 94 venues were mapped in Dane County, of which 81 are located in the City of Madison. It is observed that Districts 4 and 6 concentrate a total of 51 venues (54% in Dane County and 62% in the City of Madison). The

<sup>102</sup> Venues macro category: Arenas, Art Venues with Music, Bars, Cafés and Restaurants with Music, Dedicated Live Music Venues, Multi-Purpose Venues Night Clubs.

venue categories with the highest representation in these districts are Bars, Cafés and Restaurants with Music and Multipurpose Venues (see Map 4).

Map 4. Spatial Distribution of Venues in Madison



Developed by: Sound Diplomacy

### Music Businesses

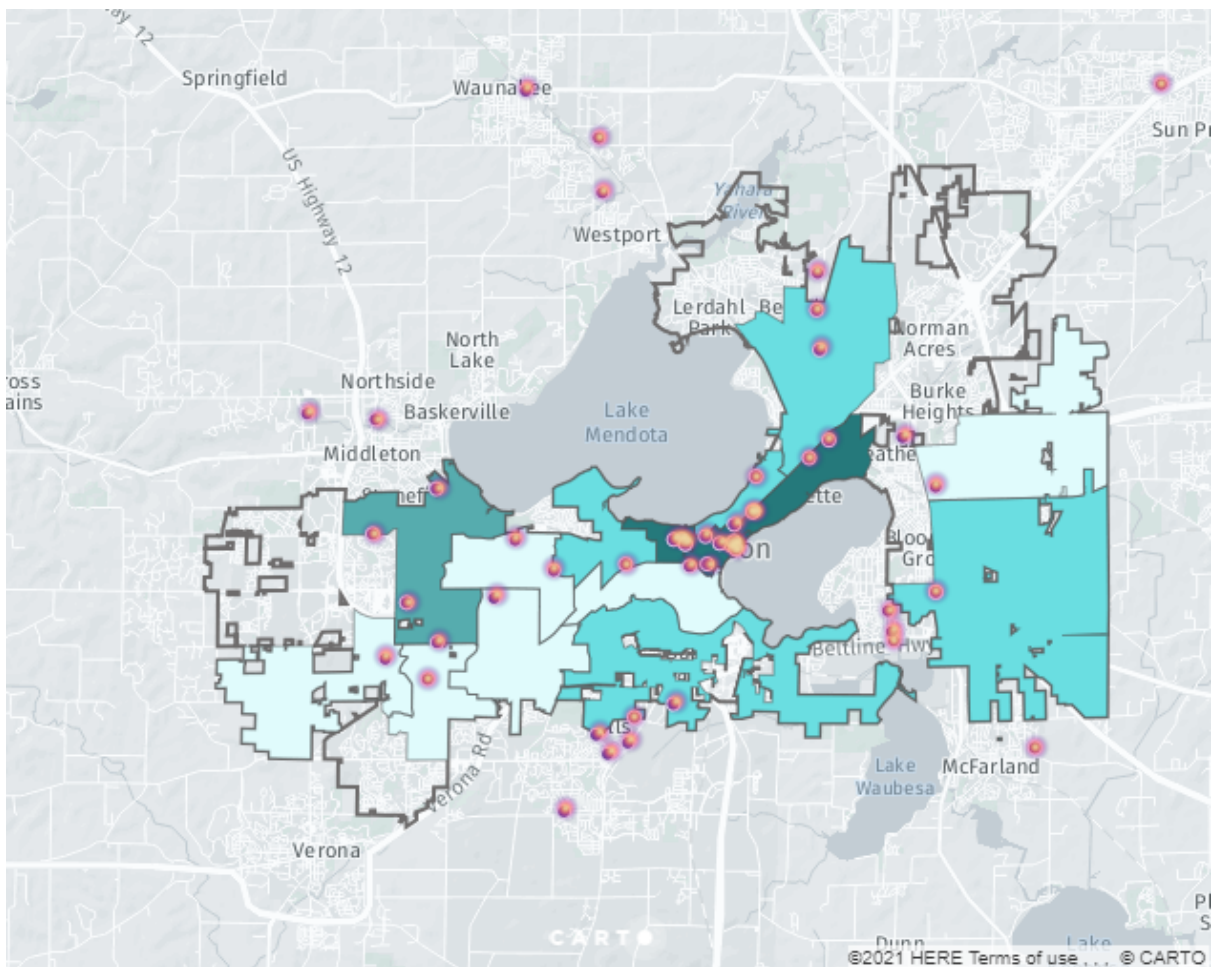
A total of 53 Music Businesses were mapped in Dane County, of which 34 are concentrated in the City of Madison. The spatial distribution of the Music Businesses within the City of Madison is concentrated in Districts 4, 6 and 8. In these districts a single cluster is identified,



which is made up of: Dance Companies, Publishing and Law, Music Non-Profit Organizations and Music PR (see Map 5).

However, Music Business is one of the categories with the greatest presence throughout the territory since it has at least one asset in every district (except for Districts 9, 15, 17, and the Town of Madison).

Map 5. Spatial Distribution of Music Businesses in Madison

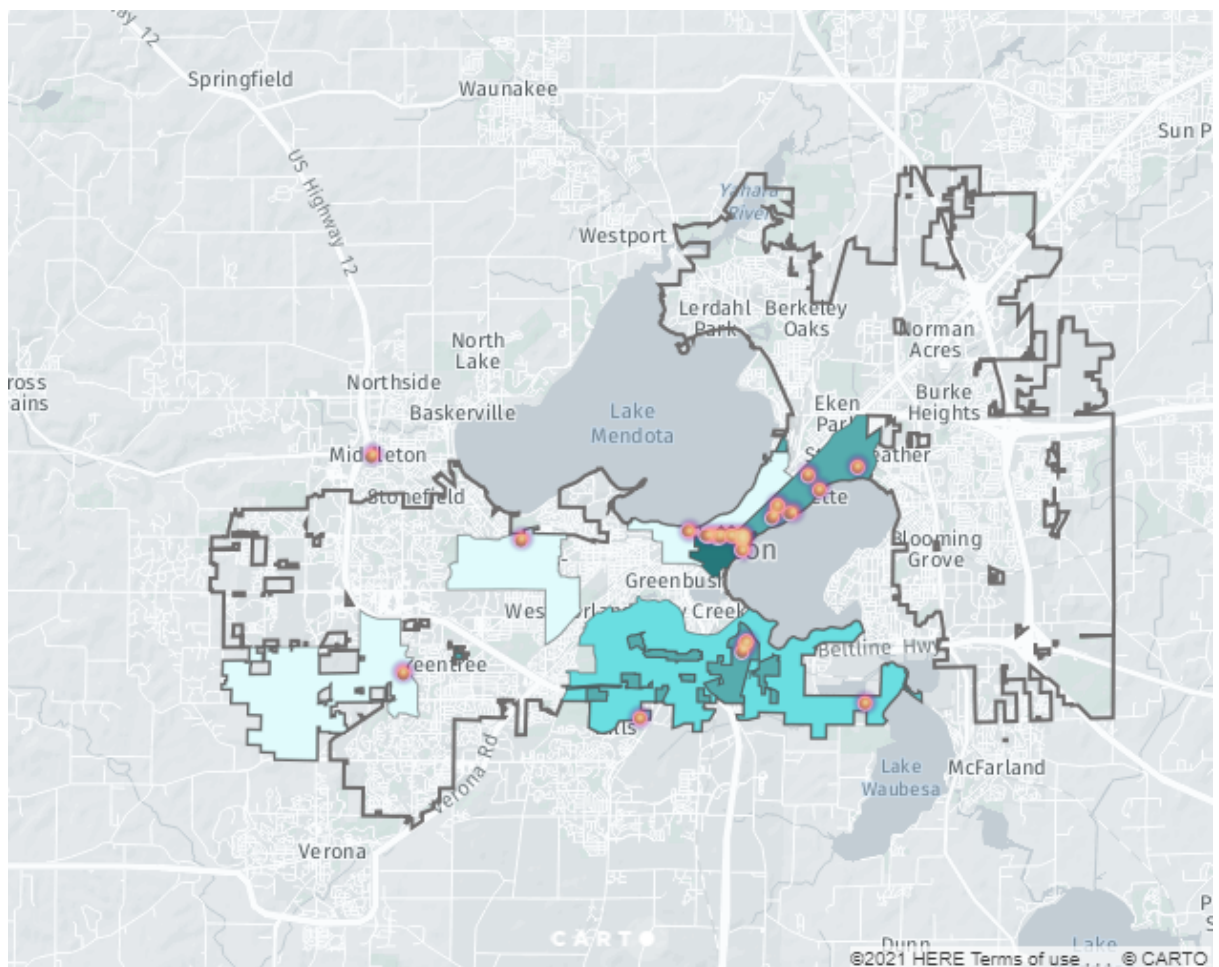


Developed by: Sound Diplomacy

## Festivals

In Dane County there are 25 festivals a year, all of which are concentrated in the City of Madison except for one, which is celebrated in the City of Middleton (Good Neighbor Festival). In addition, three clusters of festivals were identified in the City of Madison, specifically in the Districts 4, 6, and Madison Town which have 8, 7 and 3 festivals respectively out of a total of 24 festivals. Though this study is non-exhaustive and does not represent all festival locations or performances, the Greater Madison Music Project recognizes that festivals play a significant role in the music ecosystem.

Map 6. Spatial Distribution of Music Festivals in Madison



Developed by: Sound Diplomacy

## Zoning

When assessing the location of the assets according to the zoning groups, it is observed that most of them are located in Group 2 (orange) and Group 3 (red)<sup>103</sup>, which are the categories that allow commercial land use and high traffic. In contrast, there is a low concentration of assets in Group 1, which is primarily residential.

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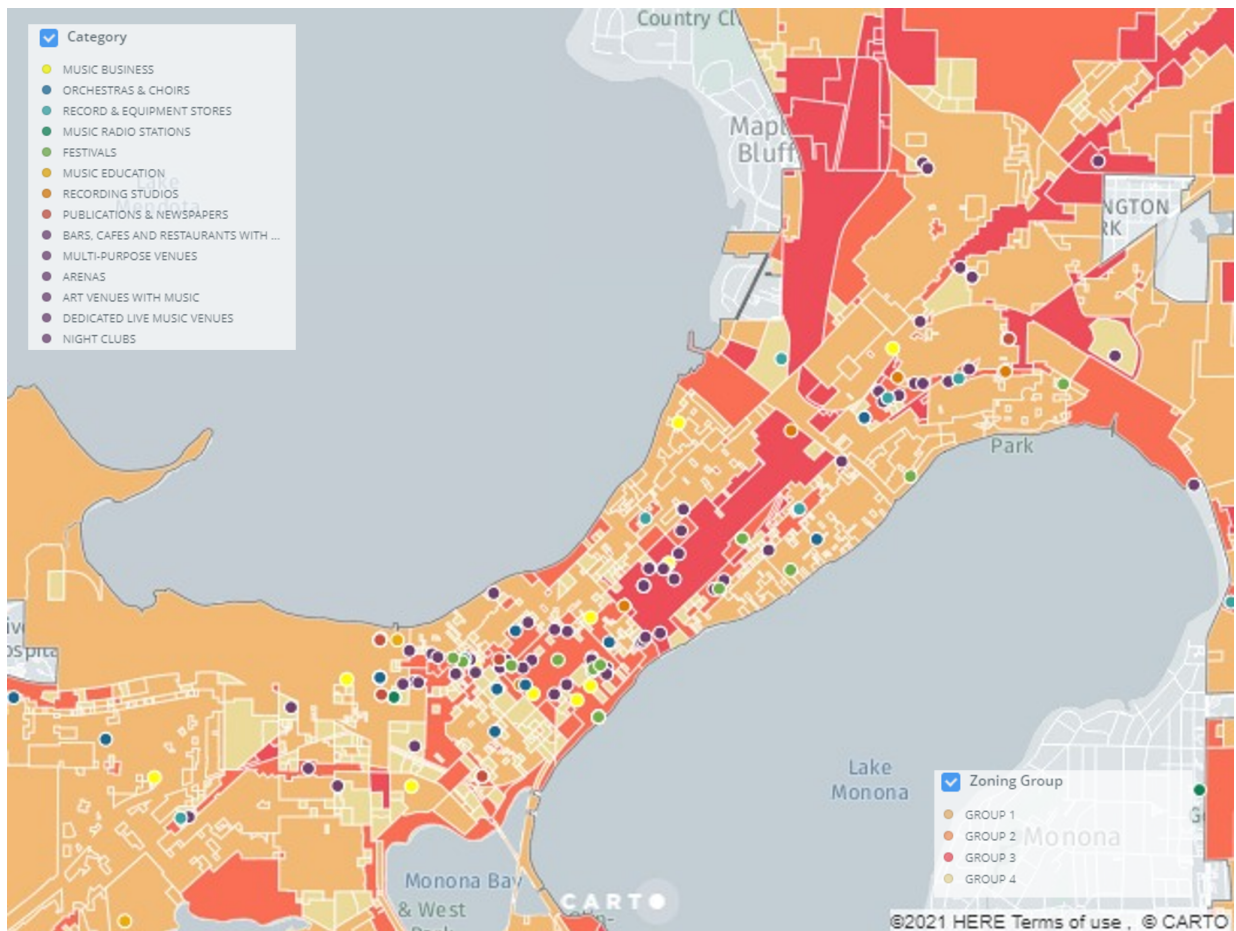
<sup>103</sup> Group 1: The zoning districts in Group 1 include all zoning districts classified as Residential, and the Agricultural (A), Urban Agricultural (UA), Campus Institutional (CI) and Conservancy (CN) districts.

Group 2: This group includes the neighborhood-serving commercial uses, pedestrian-oriented corridors, smaller-scale development and park and recreation areas.

Group 3: The zoning districts include higher-volume motor vehicle transportation corridors, larger-scale development, and primarily auto-oriented commercial and employment uses.

Group 4: Zoning Districts not listed in Groups 1, 2 or 3 are addressed as Districts of Special Control for Purposes of Signs by Madison Code of Ordinances.

Map 7. Spatial Distribution of Music Assets in Madison by Zoning Groups



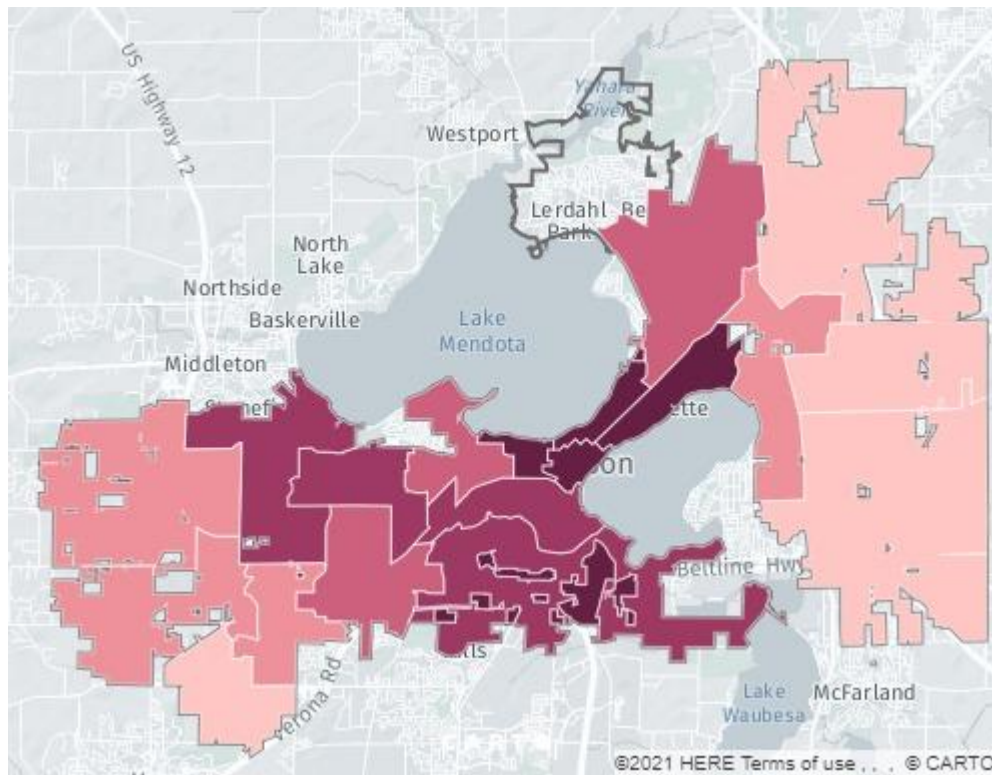
Developed by: Sound Diplomacy

#### District Density (Assets by District size)

As a complementary analysis, the density of assets per square mile was evaluated in each District. It was found that in addition to districts 4, 6 and 8 that concentrate around 50% of the Madison assets, District 2 and the Town of Madison gain relevance when we evaluate them according to their size and the amount of assets they contain, with 14 and 8 assets respectively.



Map 8. District Density (Assets by District size)



Developed by: Sound Diplomacy

### 2.3.5 Mapping Findings

It is noteworthy that within the macro category of venues (with a total of 94), the category with the most observations is that of Bars, Cafés and Restaurants with Music with 50% (47) observations, followed by Multipurpose Venues with 31.9 % (30) while Dedicated Live Music Venues add up to 9.6% (9). This implies that the live music in Dane County falls primarily in venues not exclusively designed for live music.

In general terms, the existence of three clusters within the City of Madison is observed. The first is located in Districts 6, 4, and 8, which is the corridor between the two lakes, with a total of 118 music assets that represents 50% of the total in the City of Madison. The second is

located in District 14, which has 17 assets concentrating 7.2% of the total assets, and finally District 19 that has 16 assets that represent 6.78% of the total.

### 2.3.6 Excluded Observations

The Music Asset Mapping uses the database provided by The Greater Madison Music City Project but excludes observations without a provided address and closed venues.

Observations without addresses belong partially or totally to the following categories:

- Independent Artists, Performing Groups: 361 observations excluded without an address, out of 361<sup>104</sup>
- Orchestras & Choirs: 2 observations excluded without an address, out of 30
- Publications & Newspapers: 4 observations excluded without an address, out of 20
- Closed venues: 12 observations excluded

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<sup>104</sup> None of the observations from the category 'Independent Artists, Performing Groups' had an identifiable address.

## 2.4 SWOT Analysis

The table below represents a combination of findings from roundtable discussions held by the Greater Madison Music City Project and regulatory research, mapping and economic impact assessments completed by Sound Diplomacy. It is meant to give a general overview of the key strengths, weaknesses, opportunities, and threats that will contribute to the strategy and recommendations.

### STRENGTHS

- The Greater Madison Music City project is working hard to better understand the artists' perspective on the current state of Madison's music scene and is acting upon responses to create a better environment for musicians
- Many music events are organized all year, including free events
- There is an ample amount of talent in Madison, with a great diversity of genres
- Madison has many schools, colleges and nonprofit organizations that offer youth-oriented arts and music education programs as well as professional development programs
- Madison's BID has a concentration of shopping, dining and entertainment experiences
- Madison Arts Commission and Dane Arts offer multiple annual grants programs
- The Dane County Office of Energy & Climate Change has a Climate Action Plan which contains an Arts, Design and Culture sustainability category
- The City Clerk's Office has a website dedicated to licenses and permits as well as a portal for online application submission
- Music tourism and marketing are supported by Destination Madison which has a calendar of arts and cultural events and PBS Wisconsin which features local independent artists
- Room tax provided \$45,000 in funding for the Greater Madison Music City project
- The City has begun work implementing the recommendations of the Equity in Music and Entertainment Report
- Dane County Regional Airport is only six miles northeast of downtown Madison making it easy to get into town via taxi or bus
- There is a trend of early childhood experiences with music through school or family music exposure, which means potential future talent
- New large venues such as Youth Arts Center make space for people to keep growing as musicians from youths to adults
- There is interest in protecting and revitalizing existing local spaces like The Barrymore, Crystal Corner, Harmony Bar, and Mickies on Willy St.

- The UW has several venues like the Union Terrace, Memorial Union, The Set at Union South, various theaters, etc.
- In the music ecosystem, highly educated workers earn 117% more than workers with medium level education and six times more (601%) than workers with basic education
- Madison's music ecosystem showed great adaptability in the Professional & Supporting segment during COVID-19

## WEAKNESSES

- There are not enough opportunities for local talent to be seen and expanded upon; There is a significant lack of performance opportunities and venue spaces to play or practice, for local and all-level musicians
- There is a lack of venues, bars and clubs that support the great variety of music genres that its musicians provide, Hip Hop being one of the area's most marginalized genres
- While free shows are a way to develop audiences, they can cause professional rate problems; it is difficult to make a living off music as a full-time independent artist because rates and pay are not regulated
- There is a lack of variety in K-12 music education programs
- The City's official Health & Safety web page does not contain entertainment-specific information, regulations or guidelines e.g. rules around leaving nightclubs/any kind of process in place for people's safety
- There is no official entertainment or cultural district designated
- There is no Agent of Change policy in place
- There is no cultural office
- The City's Sustainability Office does not have any programs or resources specifically related to music, culture or NTE and the Sustainability Plan focuses on visual arts over performance art or music
- There is no official busking policy in place
- There is no official music or cultural tourism plan
- There are not enough places for musicians to play, collaborate, hang out and practice
- There is a lack of commercial and marketing work to promote artists and events
- There is a lack of audience development programs that reflect Madison's rich music scene
- Artists lack access to funding for artist work, programs, and venues
- Venues are racially divided by audience and performers
- White workers earn significantly more than Black and Asian workers



- There is an income gap between the music ecosystem and the rest of the economy
- The music ecosystem is highly informal with self-employees making up most of the workforce in the area; the informality of the music ecosystem leads to a higher rate of vulnerability
- There is an indication that artists & creatives with a Hispanic or Latino/a/x background have a lower percentage of their income derived from artistic or creative sources
- Hispanic or Latino background creatives & artists are primarily located in the lowest income range
- The live music in Dane County falls primarily in venues not exclusively designed for live music
- Frank Productions and Live Nations have shaped the scene to be a National top-down experience so local artists no longer have many venue performance options
- Due to COVID-19, the Creative & Artistic segment of Madison's music ecosystem experienced a loss of 49.4% of all income, which could result in a permanent decrease of people working in the segment

## OPPORTUNITIES

- The music ecosystem can collaborate with the local ski industry to create more performance opportunities for artists
- Madison can work with regional markets in Chicago and Des Moines to develop an export program that provides more exposure for local artists
- A festival similar to Appleton, Wisconsin's Mile of Music can be created in Madison in order to showcase local musicians

## THREATS

- Madison's musicians are getting most of their income outside of Madison, and generally don't come back once they leave the city
- Madison is in direct competition with nearby cities like Chicago that have a thriving music and entertainment scene and a larger market
- Other midwestern cities like Des Moines, Iowa have more diverse musical offerings and a more supportive regulatory infrastructure

## 3. Strategic Plan

### 3.1 Zoning and Planning

While Madison does not have a dedicated Cultural Office as part of local government, Madison does have one full time staff position, Arts Program Administrator, housed in the Planning Division who oversees and supports arts initiatives. The Arts Program Administrator oversees installation of public art exhibits and staff the Madison Arts Commission, which oversees a grant program for music and art projects led by individuals and organizations. However, this role is severely limited because it shares resources with the entire planning division and has limited employee support. The Greater Madison Music City project (GMMC), a community-led, collective impact initiative, advocates on behalf of local musicians and music businesses, particularly in regards to racial equity and access, and as a result of advocacy by the Arts Program Administrator and GMMC, the City of Madison Neighborhood Planning division has been given a 20% staffing assignment to work on Greater Madison Music City projects. A formal Cultural Office or officer within the local government could work hand in hand with GMMC to further change within the ecosystem.

According to roundtable participants, not only is there a limited number of small-mid-sized venues, those that exist often limit opportunity for participation across broad demographics. Additionally, there is no hub for artists and fans of color who live in the area to gather and collaborate. Regulatory research revealed that while downtown Madison's Central BID self-identifies as the city's entertainment district, with a concentration of shopping, dining and entertainment experiences including art galleries, museums, libraries, arts centers and the University of Wisconsin, there is no dedicated entertainment district.

It is illegal for sound amplification in all areas of the city except between 12 p.m. - 1:30 p.m. and 5 p.m. - 7 p.m. or with a special event permit, downtown performance permit or private noise amplification permit. The Agent of Change policy is not in place in Madison.

The following recommendations identify areas of opportunity that should be addressed to ensure that the music ecosystem in Madison is supported and improved by dedicated zoning and planning initiatives.

## Recommendation 1: Establish a Cultural Office

Timeline: Short-term (0-12 months)

A formal Cultural Office within local government will be the key to unlocking impactful and long-lasting policy changes and initiatives to serve the ecosystem and can work hand in hand with the Greater Madison Music City Project. The Office should cultivate relationships amongst the cultural and creative industries and develop an equitable environment where all participants in the cultural ecosystem can thrive.

### Goals:

- Bridge the gap between the public and private sectors within the cultural and creative industries
- Provide the music sector with easier access to any resources and support from the City and guidance on how to navigate the City's bureaucratic processes
- Advocate for the cultural ecosystem, and build relationships that are mutually beneficial
- Oversee and reinforce the implementation of this music strategy and other culture-related strategies moving forward
- Work towards the revision of local policies to make them more friendly to the cultural ecosystem
- Cultivate and promote a more equitable and inclusive environment for artists and professionals
- Promote local music and musicians across the city, county, state, and region

### How to implement it:

- The first step to developing a Cultural Office is hiring a Cultural Officer whose job is to manage the office and implement strategies as they emerge across the various cultural sectors
- The position of the Cultural Officer should be promoted within key city departments throughout the Greater Madison area (including the Mayor's Office, Planning Departments, Tourism Departments and Chambers of Commerce) and externally within supportive businesses and organizations, like the GMMC, to maximize reach
- Job specifications for the Cultural Officer should include the following:
  - Title: Greater Madison Cultural Officer
  - Placement: Either the Community Development or Economic Development Office
  - Time commitment: Full-time

- Term: initially one year, but extendable
- Accountable to: the director of the Community Development or Economic Development Office
- Skill specification should include the following:
  - Passion and track record for engaging and creating diverse and inclusive opportunities and communities
  - Proven leadership ability, public profile and convening power
  - Experience working in a political environment
  - Experience working in or engaging with the cultural ecosystem
  - Knowledge of the local, state and national policies, licenses and regulatory frameworks that apply to the cultural and creative sectors
- Once hired, the Cultural Officer should work to enforce this strategy

## HIRING A MUSIC OFFICER FOR THE HSV MAYOR'S MUSIC INITIATIVE - HUNTSVILLE, AL<sup>105</sup>

**What Is It:** “How could the City known for its stellar rocket propulsion propel itself to the forefront of the music universe?” is the question that launched Huntsville’s Music Initiative, spearheaded by the Mayor’s Office, to improve the City’s quality of life by providing more diverse cultural offerings. As the first North American city to “embark on a comprehensive, data-driven journey to strategically amplify its music economy,” the Music Initiative’s primary goal is to curate the conditions for a dynamic musical environment.

**Who is responsible:** Huntsville Mayor’s Office

**What has it done:** The Mayor’s Office implemented a first of its kind Music Board to represent the varied interests of Huntsville’s music ecosystem. The Board was officially appointed in January 2020. Following their appointment, the Board got started on the next action which was to hire a Music Officer to serve as a resource

<sup>105</sup> City of Huntsville (2021) “Music Initiative.” Online at <https://www.huntsvilleal.gov/government/mayors-office/mayors-initiatives/music-initiative/#:~:text=As%20Huntsville's%20Music%20Officer%2C%20Matt,planning%20initiatives%20and%20economic%20opportunities> accessed 02-05-2022

for the local music scene. Specifications for the Music Officer included the following:

<sup>106</sup>

- Bachelor's degree in Music, Communications, Marketing, Public Relations, or related field from a college or university accredited by a regional accrediting agency
- Thorough knowledge of the theories and practices of the music industry to expand its presence within and beyond the City of Huntsville and thorough knowledge of the overall process and environment for making the necessary connections between government and the music industry
- Ability to establish a rapport with the music sector to foster an environment for growth
- Ability to establish and maintain effective working relationships with industry and business representatives, public officials, community leaders and organizations, department heads and other city employees
- Possess the personality and interpersonal skills appropriate for fostering compromises and resolution of conflict. Requires regular and prompt attendance plus the ability to work well with others and work well as a team

The City's inaugural Music Officer was hired in 2022.

**Lesson for Madison:** Creating an initiative with the expressed goal of creating an economically viable music sector through collaboration, promotion, and creation of opportunities could help the Greater Madison area develop into a model for the upper-midwestern region. However, ensuring that the initiative has a leader who is familiar with the work and passionate about promoting an equitable environment is key to achieving these goals.

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<sup>106</sup> City of Huntsville (n.d.) "Huntsville Music Officer." Online at <https://www.governmentjobs.com/careers/huntsville/jobs/3149564/huntsville-music-officer-grade-17?pagetype=jobOpportunitiesJobs> accessed 02-05-2022

## Recommendation 2: Incorporate the Agent of Change Policy to Protect Live Music Venues

Timeline: Short-term (0-12 months)

Agent of Change is not currently in place in Madison. The Agent of Change principle is a protective policy used in cities around the world to hold new developments accountable for sound attenuation. Once implemented it should be regularly assessed to better serve the necessities of cultural operators in expanding development areas.

### Goals:

- Ensure the sustainability of the City's vibrant music scene
- Reduce the number of fines to music establishments due to noise complaints
- Establish policy guidelines for noise attenuation, both by events and music spaces using amplified music and by developers building near existing sources of loud noise
- Attract new music businesses (and connected industries) to the area as a result of greater policy support for the sector

### How to implement it:

- The Policy should be implemented by the City's Planning and Building Inspection divisions and the Greater Madison Music City Project
- The Policy should establish clear expectations on noise limits, measurements and attenuation strategies for coexistence of music places, businesses, residents and visitors
- The policy should include an Agent of Change principle affecting a 100 feet radius of existing live music performance venues and other spaces where music amplification is regularly expected, such as recording studios, churches and music school
- An automatic trigger when a new planning permit application is lodged to initiate the sound attenuation assessment. If a venue is built next to an existing development the venue will be responsible for noise attenuation and the existing premises will be protected through Agent of Change
- New developments may either soundproof themselves, soundproof the source of potential noise/nuisance or take no measures, but they must be made aware that the City will not close the existing venue down due to their noise complaints

- New residents or businesses should be asked to sign a memorandum of understanding when moving into a property involved in an Agent of Change jurisdiction
  - This should also apply to multipurpose spaces that also act as music venues; this can be accomplished through a disclaimer or agreement with neighbors

## AGENT OF CHANGE - SAN FRANCISCO, CA

**What Is It:** San Francisco's Agent of Change Law<sup>107</sup> (Chapter 116 of the San Francisco Administrative Code) was approved in December 2015 and requires venues to maintain the sound levels they operate at within the limit of their entertainment permit in order to remain under legal protection. It is the responsibility of the property developer to inform any new residents of the existing sound in the area. San Francisco also protects music venues from hotel and motel sound complaints within 300 feet of the venue.

**Who is responsible:** The City of San Francisco

**What has it done:** Through implementing an Agent of Change Law and revising existing licenses and regulations, San Francisco is now promoted as a 'music friendly' city. Venues often struggle with applications where authorities do not understand the process or have a desire to help. By streamlining these processes and being more transparent, it has allowed San Francisco to better serve the needs of the community.

**Lesson for Madison:** Similar to San Francisco, implementing an Agent of Change law or policy in Madison could help solidify the area's music-friendly brand while easing the path for existing and prospective venue owners. Overall, it can help create a better atmosphere for venues and residential properties to co-exist.

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<sup>107</sup> City and County of San Francisco (2015) San Francisco Administrative Code, Chapter 116: Compatibility and Protection for Residential Uses and Places of Entertainment. Online at <https://sfgov.org/entertainment/sites/default/files/FileCenter/Documents/2790-Chapter116.pdf> accessed 15-4-2019

## Recommendation 3: Develop New Entertainment, Cultural, and Creative Districts

Timeline: Long-term (3+ years)

While the BID liaises between district businesses and property owners, the City of Madison, lacks an official entertainment or cultural district. Creating a cultural district initiative which can illustrate the value of spaces outside of downtown could help build a more inclusive atmosphere while also providing other neighborhoods and areas with access to resources to promote their music scene(s).

### Goals:

- Relieve the main BID area by developing new spaces that can be used by local independent music ecosystem professionals to develop new projects
- Allow local music ecosystem professionals to develop new projects sustainably
- Expand and diversify the cultural offering and increase tourist draw
- Set equitable and progressive standards for music events in terms of noise and zoning
- Protect music activity amidst increased population density
- Increase the amount of rehearsal spaces available to local musicians

### How to implement it:

- The City should assess whether there are spaces outside of the high activity areas, either unused or already in use, that could be further developed for cultural and music activity; the mapping assessment may be useful in determining this
- City planners and developers should work together to ensure that culture is central to all redevelopment work. Social inclusion, mental health, affordable and accessible housing, and education must remain fundamental to all future planning
- Local communities should be involved in consultations so that community-led creative planning takes place. This would ensure Madison's diversity and aspirations are truly encapsulated
- All planning that occurs should ensure that no communities are displaced in the process



## LOUISIANA CULTURAL DISTRICTS - USA<sup>108</sup>

**What Is It:** The Louisiana Cultural Districts initiative launched in 2007 with the goal of sparking “community vitalization based on cultural activity through tax incentives, technical assistance, and resources.”<sup>109</sup> The program:

- Allows local government to designate a Cultural District to revitalize a community by creating a hub of cultural activity
- Allows income and corporate franchise tax credits for eligible expenses for rehabilitation of owner-occupied or revenue-generating historic structures in a Cultural District
- Provides an exemption from sales and use taxes for proceeds received from the sale of original, one-of-a-kind works of art from locations established within the Cultural District
- Requires local governments who designate such districts to report on impact to their community annually

**Who is responsible:** Louisiana Office of Cultural Development

**What has it done:** As of July 2019, 106 cultural districts have been named in 67 towns and 38 parishes. 31% of Louisiana’s population lives in designated cultural districts and those areas account for 48% of the state’s cultural jobs. An estimated 337 commercial renovation projects and 696 residential projects began in 2019 in cultural districts across the state. A total of 2,323 cultural events with nearly two million people in existence were held in 2019. Cultural districts reported a total of 389 new businesses in 2019, 98 of which were art and cultural businesses. Total revenue reported in the districts amounts to \$3.4 billion.<sup>110</sup>

**Lesson for Madison:** Establishing cultural districts is a way to highlight the unique qualities prevalent in different areas around the state while providing tangible resources to allow for their sustainability. As evidenced in the case study above,

<sup>108</sup> Louisiana Office of Cultural Development (2022) “Louisiana Cultural Districts.” Online at <https://www.crt.state.la.us/cultural-development/arts/cultural-districts/index> accessed 03-05-2022

<sup>109</sup> Ibid.,

<sup>110</sup> Louisiana Office of Cultural Development (2019) “Annual Report 2019.” Online at [https://www.crt.state.la.us/Assets/OCD/arts/culturedistricts/annualreports/2019AR\\_ExecSummary.pdf](https://www.crt.state.la.us/Assets/OCD/arts/culturedistricts/annualreports/2019AR_ExecSummary.pdf) accessed 03-05-2022

cultural districts also bring in substantial revenue by attracting new businesses and cultural events.

## Recommendation 4: Review and Revise Sound Ordinance Policies

**Timeline:** Short-term (0-12 months)

The City should look to revise the noise ordinance regulations in order to specify the policies in music-related venues and increase noise allowances in the proposed cultural districts. Combined with the implementation of the Agent of Change policies which would make newer developments responsible for their noise attenuation (see [recommendation 2](#)), revising and specifying noise ordinances would make it easier for businesses to operate knowing they are adhering to the regulations.

### Goals:

- Ease the burden on venues especially clubs and live music venues by reducing regulation confusion
- Expand employment opportunities for local artists and revenue growth for local venues by having higher noise thresholds

### How to implement it:

- The City should implement a one year pilot program on increasing noise levels in entertainment districts with regular stakeholder feedback discussions from residents, businesses, venues and musicians
- Venues should regularly submit sound monitoring reports in order to ensure that proper protocols are being put in place and followed
- There should be a hotline, potentially managed by the Board of Noise Control Appeals, for residents in the area to report whether or not the noise limits are being followed
- A guide for venues on monitoring and reducing noise should be created and distributed, as well as made accessible online

## RED RIVER HOURS PILOT PROGRAM - AUSTIN, TX

**What Is It:** The Red River Extended Hours Pilot Program was a one-year initiative by the City of Austin that assessed the impact of extending the sound curfew by one hour on Thursday, Friday and Saturday nights for five outdoor music venues in the Red River entertainment area.

The City of Austin held nine neighborhood meetings and three stakeholder meetings with representatives from venues and residents during the pilot program, which took place between May 2017 and April 2018. City staff also set up a hotline for residents in the area concerned about noise. Venues committed to submitting strict sound monitoring throughout the process, and sound monitors were installed to measure noise levels inside the participating venues, as well as at hotels and homes in the area.<sup>111</sup>

**Who is responsible:** The City of Austin

**What has it done:** The pilot ended with satisfactory results: the program evaluation showed the extension resulted in a consistent increase across all venues in bar sales, ticket sales, salaries paid to staff, number of local acts booked, and fees paid to local acts, all while having no significant impact on nearby neighborhoods and reducing the number of noise complaints registered.<sup>112</sup>

The successful pilot was passed into an ordinance in 2018, and the participating Red River venues now benefit from extended curfews of midnight on Thursdays and 1 a.m. on Fridays and Saturdays. Stakeholder meetings take place four times per year to ensure compliance with sound regulations, discuss ways to enhance the program and ensure the quality of life for nearby residents is not negatively impacted.<sup>113</sup>

**Lesson for Madison:** Developing a pilot program that extends sound curfews for music venues during weekend nights could positively impact the music ecosystem by allowing business to operate longer and encouraging cooperation between local

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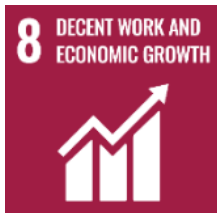
<sup>111</sup> Deborah Sengupta Stith (2018) "Venue Owners Say Red River Curfew Extension could Bring Big Benefits to Austin Music." accessed 05-05-2022

<sup>112</sup> Ibid.

<sup>113</sup> Christopher Neely (2018) "Austin City Council Extends Music Curfew Pilot Program at Red River Cultural District." Online at <https://communityimpact.com/austin/central-austin/city-county/2017/10/19/austin-city-council-votes-continue-extend-music-curfew-pilot-program-red-river-cultural-district/> accessed 05-05-2022

residents and music venues. It may also be a good idea to either institute a hotline or quarterly roundtables in order to get community input on how the program is going, whether it is successful or not, and what adjustments can be made.

#### SUSTAINABLE DEVELOPMENT GOAL/S AND TARGET/S:



**Target 8.3:** Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services

**Target 8.5:** By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value



**Target 11.4:** Strengthen efforts to protect and safeguard the world's cultural and natural heritage

## 3.2 Licensing and Regulations

There is no official busking policy in place in Madison. Street performers who do not use public electricity for amplification are not required to be licensed and are generally allowed to play whenever and wherever as long as they do not receive complaints, obstruct the right of way or sell anything without a street vendor license. For musicians who do use an amplifier, it is legal to use amplification in most of the city between midday to 1:30 p.m. and 5 p.m. to 7 p.m. To play at State Street and one corner of the Capitol Square, buskers must apply for a one-time-only 'Downtown Performance Space' permit for \$15 and can only play in five

designated performance spaces at certain times.<sup>114</sup> These downtown performance spots are highly coveted and competitive, especially during downtown events.<sup>115</sup> Creating a busking code and revising the downtown performance permit would help create a better musical and performance culture in Madison.

The City's official Health & Safety web page does not contain music-specific information, regulations or guidelines e.g. rules around leaving nightclubs/any kind of process in place for people's safety (street ambassadors, etc). One way to create a streamlined approach to health and safety precautions is to create a best practice guide for music-related venues.

The Arts, Design and Culture category in the Dane County Climate Action Plan states that art, design and culture play vital roles in maintaining a high quality of life and therefore should be an integral part of creating sustainable solutions for achieving civic goals. The category's specific vision states that sustainability should be an integral part of Madison's art program and sustainable design efforts. As such, promoting sustainable practices specific to the music ecosystem should be prioritized.

## Recommendation 5: Implement a Busking Policy and Revise Downtown Performance Permit

**Timeline: Short-term (0-12 months)**

Revising the current Downtown Performance Permit stipulations and creating a busking code would help create a better musical and performance culture in Madison which will attract visitors and tourists and build Madison's brand as a music city.

### Goals:

- Activate the city's public spaces through active participation via live performances
- Galvanize audience engagement in the local arts and music scene
- Develop Madison's brand as a place for music, entertainment, and culture
- Increase publicity and income generation for musicians and performers

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<sup>114</sup> City of Madison (n.d.) "Downtown Performance Space Permit." Online at <https://www.cityofmadison.com/specialevents/Performance.cfm> accessed 05-05-2022

<sup>115</sup> Isthmus (2019) "Busker Blues." Online at <https://isthmus.com/news/news/bassist-josh-cohen-is-fighting-madisons-amplified-sound-rest/> accessed 05-05-2022

## How to Implement It:

- Revise the Downtown Performance Permit application or registration policy for buskers. This will help control the number of people busking in the City, and protect those who have gone through the appropriate processes to obtain them. A permit should be set at an affordable rate and available for short term (1 month) and long term (1 year), be easy to apply for, have a quick turnaround for approval, be available online to print out, and can be renewed easily. Buskers would be expected to keep their permits on view at all times during performances
- Prepare a fact sheet or busking code for performers to know their rights and responsibilities with information on noise and amplification rules, applications process, links to resources and permits, designated busking zones map, general rules and etiquette
- Noise ordinances should also be revived to allow busking to take place without it negatively impacting local businesses and neighbors
- Consult with local businesses, heritage sites and venues to create pitches outside their establishments
- Work with Destination Madison to include busking sites on online tourism material
- In the future, a city-wide event, festival or program for International Busking Day could be created to drive tourists and visitors to Madison

### ASHEVILLE STREET PERFORMANCE GUIDE-ASHEVILLE, NC

**What Is It:** Made by the Asheville Buskers Collective, this guide looks to give any busker or potential busker the dos and don'ts of busking in the city of Asheville.

The guide starts by mentioning the most important thing to consider in order to avoid trouble: what constitutes a noise disturbance. It also features busking etiquette - how long you can play in one spot, cleanliness, leaving enough space for pedestrians to go by, not playing repetitive songs and keeping the volume at a reasonable level.

It also features a paragraph stating the right of a busker to perform on public property, and the positive effect it has on the identity and atmosphere of the city.

It ends with a list of rules and laws that must be followed, which reiterates some of the ones mentioned in the etiquette list, and adds the following: not drinking alcoholic beverages or taking drugs, permitted times of 10 a.m. to 10 p.m., considerations on high impact areas, not using dangerous objects such as axes and

saws for performances, and not busking in a space designated for a community event.

**Who is responsible:** The City of Asheville and the Asheville Buskers Collective

**What has it done:** Asheville busking has become so popular that it is now incorporated into the City's brand and is recognized as a major tourist draw. By encouraging buskers to introduce themselves to surrounding businesses and other performers, the guide has broadened the busking community and helped cultivate neighborliness amongst creative artists and attractions. The Guide has also led to the cultivation of two high-traffic performing areas: the area around the Flat Iron sculpture on Wall Street at Battery Park Avenue and the Haywood Street sidewalk in front of Woolworth Walk. Prime locations and an active community have allowed Asheville to develop a thriving busking scene.<sup>116</sup>

**Lesson for Madison:** Creating a busking guide and cultivating community between businesses and buskers not only attracts tourists but also has the ability to solidify Madison as a thriving entertainment scene for visitors and consumers.

## Recommendation 6: Create a Best Practice Guide for Live Music Venues Detailing All Relevant Regulations, Policies, and Ordinances

**Timeline: Short-term (0-12 months)**

One way to create a streamlined approach to the licensing and regulations process is to create a best practice guide for music-related venues. The Guide can detail different policies, permits, and procedures as well as COVID-19 measures and recommended safety technologies. This is both a resource for current and new business owners looking for ways to optimize their operations. The Guide can act as an ever-evolving manual for those seeking information and clarification on certain practices and how they should best be implemented.

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<sup>116</sup> Polly McDaniel (2017) "Asheville Street Performers Brochure Provides Guidelines." Online at <https://www.ashevillenc.gov/news/ashevilles-street-performers-brochure-provides-guidelines/> accessed 05-05-2022

## Goals:

- Increase the perception of safety in Madison by making recommendations and suggestions which would create a more inviting environment
- Make the music industry more accessible to new businesses by providing resources that set them up to be successful

## How to implement it:

- The Guide can include information such as: event and liquor license procedures and costs, environmental considerations, sound ordinance and zoning information, and health and safety precautions
- The Guide should be made available online, but also should be physically handed to businesses owners to promote the resource
- The online version should be listed on the City's website as well as other relevant websites, like GMMC's, in a prominent position
- The Guide should be regularly updated to account for changing policies and procedures
- Regular assessments should be conducted to account for the efficacy of the Guide and what further information should be included

### NIGHT TIME ECONOMY GUIDE - NEW SOUTH WALES<sup>117</sup>

**What Is It:** New South Wales' (NSW) Night Time Economy Guide was created to assist prospective practitioners of the night time economy in successfully starting and running new businesses in the sector by detailing the processes and considerations that must be made prior to entering the industry. Relevant information includes:

- What the night time economy is and how it differs from other industries
- Relevant legislation information
- Core night time economy uses and corresponding land use
- A step-by-step guide through event and liquor permitting processes

<sup>117</sup> New South Wales Government (2018) "Guide for Establishing and Managing Night Time Economy Uses." Online at <https://www.planning.nsw.gov.au/-/media/Files/DPE/Manuals-and-guides/guide-for-establishing-and-managing-night-time-economy-uses-2019-01-24.pdf> accessed 15-02-2022



- Examples of council processes and policy which illustrate the nuances of navigating the approval process

**Who is responsible:** The New South Wales Government

**What has it done:** NSW has committed to keeping it updated in accordance with changes in processes, and in order to keep night time economy practitioners informed, they can sign up for email updates on the website. One recent change regards the passing of the 2020 Liquor Amendment Act which shifts current disciplinary and sanction procedures, provides cumulative impact assessments and regulates liquor deliveries. To inform night time economy practitioners of the changes, a fact sheet was created and sent to those on the email list. This information is also available on the NSW website.<sup>118</sup>

**Lesson for Madison:** Creating a best practice guide allows for simpler navigation of the processes and procedures necessary for developing and maintaining a successful music business. However, it is not simply enough to create the document but to consistently update it so that the information does not become dated and to prominently display it on the website so that practitioners can easily find needed information. The public should also be informed whenever a change is made.

## Recommendation 7: Develop a Sustainability Guide for Music Venues and Events

**Timeline:** Short-term (0-12 months)

Given the encouraging environment that already recognizes the arts, design, and culture as a vital part of the community and ecosystem, promoting sustainable practices for music venues can bring the City of Madison closer to the goal established by the Dane County Office of Energy and Climate Change.

### Goals:

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<sup>118</sup> New South Wales Government (2022) "Night Time Economy." Online at <https://www.planning.nsw.gov.au/Policy-and-Legislation/Night-Time-Economy> accessed 05-05-2022

- Encourage cross-sectoral collaboration between public, private, and nonprofit industries
- Broaden the reach of sustainable initiatives as well as increase positive outcomes of said initiatives
- Help the City develop more creative approaches to sustainable policy creation

#### How to implement it:

- The Guide should be made available online and physically distributed to local businesses and organizations
- Practices and initiatives in the Guide could include:
  - recycling and waste disposal instructions for music festivals
  - ways to prevent noise pollution through greater focus on attenuation
  - public transportation and carpooling guides for traveling artists
  - utilizing, to the extent possible, locally sourced products and services for events
- There could be a program that recognizes art businesses for their environmental considerations through rewards, badges, or public announcements

#### THE GREEN MUSIC INITIATIVE - BERLIN, GERMANY<sup>119</sup>

**What Is It?** The Green Music Initiative is a platform that promotes environmental sustainability in the music and entertainment industry by researching and developing CO2-reduction strategies specific to related sectors. It works with scientists, music stakeholders, sustainability organizations and artists across the world.

**Who Is Responsible?** It is a non-profit independent cross-sector think tank in Germany that works regularly with global consultants (Greenpeace,<sup>120</sup> Universal Music,<sup>121</sup> Berlin Music Week,<sup>122</sup> Club Commission,<sup>123</sup> Reeperbahn Festival<sup>124</sup>). It relies

<sup>119</sup> Berlin Music Commission (n.d.) "Green Music Initiative." Online at

<https://www.berlin-music-commission.de/en/mitglieder/green-music-initiative-2/> accessed 14-03-2022

<sup>120</sup> Clean Energy Wire (2018) Website. Online at <https://www.cleanenergywire.org/experts/greenpeace-germany> accessed 16-05-2022

<sup>121</sup> Universal Music Group (2022) Website. Online at <https://www.universalmusic.com/> accessed 16-05-2022

<sup>122</sup> Berlin Music Week (n.d.) Website. Online at <https://www.berlin-music-week.de/en/festival/> accessed 16-05-2022

<sup>123</sup> Clubcommission Berlin (n.d.) Website. Online at <https://www.clubcommission.de/> accessed 16-05-2022

<sup>124</sup> Reeperbahn Festival (2022) Website. Online at <https://www.reeperbahnfestival.com/en/frontpage> accessed 16-05-2022

on donations and funding for projects.

**What Has It Done?** It has worked with partners (Kulturprojekte Berlin, Popakademie Baden-Württemberg, Popakademie Mannheim) to develop projects and sustainability models for festivals, events, awards and venues. The team also created the first Green Touring Handbook and Green Touring Network.

**Lesson for Madison:** To promote a sustainable environment for music artists and businesses, enhancing collaboration and planning is necessary. The Green Music Initiative is a good example of how an organization can be a model for environmentally friendly policies within the music industry and lead the way towards sustainable innovation.

## SUSTAINABLE DEVELOPMENT GOAL/S AND TARGET/S:



**Target 8.3:** Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services

**Target 8.9:** By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products



**Target 11.3:** By 2030, enhance inclusive and sustainable urbanization and capacity for participatory, integrated and sustainable human settlement planning and management in all countries

### 3.3 Economic Development

Madison has a rich and unique musical heritage that must be preserved and promoted. Regulatory research showed that the City has plans and strategies that aim to protect the culture and heritage of Madison such as the Historic Preservation Plan adopted in 2020 and the Historic Preservation Ordinance that is currently being updated. The City of Madison Comprehensive Plan has strategies such as integrating public art throughout the city that reflects Madison’s cultural diversity and heritage. However, none of these strategies specialize in promoting Madison’s musical heritage.

According to roundtable participants, Madison has a large, diverse, high caliber of musicians, however much of Madison prefers national acts over local acts and promotes tourism this way. Madison needs to include its local talent in its tourism communication because they have great potential too.

The economic impact assessment showed that the music output per capita in Madison is approximately \$796, higher than the \$444 music output per capita of the United States. However, in cities such as Austin, New Orleans and New York, this figure is \$1,899, \$1,721 and \$1,604, respectively (see figure 16). One reason for the higher outputs is that these cities have high flows of music tourism. One effective way to promote music tourism is to design a cultural tourism plan, as Austin’s Economic Development Department did in 2015. Madison does not have a cultural tourism plan.

Destination Madison is greater Madison’s official destination marketing organization which has a regularly updated detailed calendar of creative and cultural events including concerts, gigs and club nights. However, according to stakeholders, Madison needs an easy, organized way to know all of the music-based events happening for visitors and residents, because there is a lack of commercial and marketing work to promote artists and events. There also needs to be more communication between venues and local bands to strategize show

opportunities as well as getting people to come see shows. This could be improved by ensuring the City works with Destination Madison (Formerly the Greater Madison Convention and Visitors Bureau - GMCVB) to increase their destination marketing of Madison's arts and culture by designing a specific cultural tourism plan as well as including art and music in their triennial strategic plans.

Stakeholder engagement showed that there is a need for fair compensation for musicians in Madison. Stakeholders stated that trying to be a performing musician full time is very difficult as pay is minimal. Musicians are not fairly paid and some are forced to play for free or even asked to pay to be able to perform in big venues. This diminishes the perceived value of the music industry and forces artists and other contributors to seek work outside of the industry where they can receive a more predictable income. Creating a fair pay policy and guide would be the first step to tackling this issue and making the live music industry more sustainable.

There is an ample amount of talent in Madison, with a great diversity of genres. However, there is a significant lack of promoting original music and ensuring adequate genre and cultural representation. According to stakeholders, Madison is missing locally owned, diverse venues that are available to all musicians and genres.

The Equity in Music and Entertainment Report, identified large racial disparities between black and white audiences and performers in Madison's music and entertainment scene. There is poor venue consistency in terms of hosting Hip Hop / Black culture related events, and a need for more BIPOC audience development to make Madison's music system more accessible and diverse.

The creation of a directory of music business and talent in Madison would help to develop a community and network for musicians and industry professionals. It would facilitate collaboration and help people find artists, venues, sponsorships, etc.

## Recommendation 8: Design a Music Tourism Plan and Diversify Madison's Tourism Economy <sup>125</sup>

**Timeline: Short-term (0-12 months)**

Developing a music tourism plan for Madison would position the music sector as a key economic component for the City. The music tourism plan, a section for music can include

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<sup>125</sup> This recommendation represents a culmination of input from both Sound Diplomacy and the City of Madison's Tourism Music Hub work group

strategies for building Greater Madison’s brand as a music city, increasing knowledge of the city’s musical heritage, and promoting local music. Should the City wish to reap the benefits of music tourism and a thriving music ecosystem, music needs to be integrated into all tourism marketing channels, as well as create strategic plans to successfully highlight its local industry.

### **Goals:**

- Increase visibility for events, opportunities, and musical genres that have been overlooked in the past
- Increase tourist revenue and taxable income by marketing to people who may not know that arts, culture, and entertainment are key aspects of the area
- Attract different demographics to Madison by showcasing the different experiences available
- Increase visibility and promotional efforts for businesses in Madison, which in turn increases traffic and profitability

### **How to implement it:**

- Musical aspects of a cultural tourism plan could include:
  - Ways to showcase Madison’s varied musical heritage across multiple styles and genres
    - this could be accomplished by placing markers around the City, highlighting key aspects of Madison’s music history at the airport for incoming travelers, or even developing an app which tracks the user’s location and gives audio information on the tour stops
  - Developing a Greater Madison Music City logo to be placed in public areas around the region to establish brand recognition
  - Promoting local music of all styles and genres on radio stations
  - Developing a music export program which actively seeks opportunities for local artists to network and perform outside of the city
- In the future relevant stakeholders<sup>126</sup> and local business owners could collaborate in order to develop tourist packages that include all interested entertainment areas and that provide discounts for visitors coming to engage one area to visit the others

### **Further Considerations:**

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<sup>126</sup> “Stakeholders” is a term used to identify local community members that participate in the music ecosystem, whether it be through business, performance, governance, advocacy, etc.

- The City of Madison developed recommendations for the cultivation of Greater Madison as a Tourism Music Hub
- In so doing, they hope to work toward three goals with correlating strategies and actions. These are as follows:
  - Goal 1. Develop and implement a plan with intentional strategies and set of actions to ensure music tourism is part of Greater Madison’s growth for years to come
    - Strategy: Make the Greater Madison area an even cooler place to live, work, and play to gain recognition of music’s value to attract tourism
      - Action 1a: Incorporate music into Madison’s marketing strategy in collaboration with Destination Madison and deliberately engage people of color and local artists
  - Goal 2. Become the first cultural music and art hub of the Midwest.
    - Strategy: Balance the concentration of cultural and entertainment venues between the downtown and other areas of the city by promoting cultural music events in diverse neighborhoods
      - Action 2a. Form partnerships among organizations in the tourism sector, local artists, music/festival organizers, and music producers for marketing campaigns to develop a music festival that identifies or creates the “brand” of our Tourism Music Hub scene (foster local musicians)
      - Action 2b. Develop a music calendar app to promote music events
  - Goal 3. Increase the Madison Region’s competitive cultural and tourism advantage in Wisconsin
    - Strategy: Keep the community informed about the importance and impact of the music economy as a major regional economic driver
      - Action 3a. Create a Music Commission to oversee equal opportunity practices in marketing campaigns to ensure music tourism is inclusive and attracts diverse companies, acts etc. (i.e., the sports commission, festivals, conferences, chamber of commerce)
      - Action 3b. Generate a venue inventory, list of organizations, festivals and performers to help develop a Market Assessment. This will require the help of Sound Diplomacy and the GMMC team
      - Action 3c. Promote professional development opportunities to festival and event organizers, and musicians
      - Action 3d. Apply for grant funding with the help of GMMC and the City of Madison

## ARTS AND CULTURE TOURISM STRATEGY, 2025 - SOUTH AUSTRALIA<sup>127</sup>

**What Is It:** The South Australia Arts and Tourism Strategy, 2025 is a plan developed through collaboration with the creative industries and the South Australian Tourism Commission to both recognize the value of the arts and incorporate it into the tourism sector in a substantial way. Recognizing the impact of the various art exhibits, events, and festivals, the South Australian Tourism Commission looked for ways to bolster the artistic community.

The Strategy also takes as its mission to recover tourist revenue, which suffered a significant drop in the wake of the COVID-19 pandemic from \$1.4 billion to \$700 million. The Commission views investment in the arts as a way to restore the industry fiscally by 2025. Other goals include:

- Strengthening arts and cultural tourism
- Promoting year-round arts engagement
- Empowering the sector to develop world-renowned tourism offerings
- Championing Aboriginal culture
- Measuring, amplifying, and valuing South Australia's artistic offerings
- Supporting the arts and cultural sector
- Supporting the South Australian visitor economy

**Who is responsible:** The South Australian Tourism Commission

**What has it done:** In 2021 domestic tourism still fell short of projections, but regional tourism saw exponential growth as South Australia embraced local holidays. Visitor expenditure also saw a major improvement from the prior year. Since the new Strategy allowed for more investment in the cultural sector, the Commission was able to plan for existing as well as future events.<sup>128</sup>

**Lesson for Madison:** Creating a cultural tourism strategy could put Madison on the path to cultivating more revenue from music-related businesses and recovering from the impact of COVID-19 on the sector. Like South Australia, specific cultural considerations could be made to develop new events surrounding Madison's varied

<sup>127</sup> Government of South Australia (2021a) "Arts and Cultural Tourism Strategy." Online at <https://tourism.sa.gov.au/strategies/strategies/arts-and-cultural-tourism-strategy-2025> accessed 19-01-2022

<sup>128</sup> Government of South Australia (2021a) "South Australia's Visitor Economy in 2021." Online at <https://tourism.sa.gov.au/news-articles/wishing-you-a-safe-prosperous-festive-season> accessed 19-01-2022



musical culture and the ways that this culture contributes to Madison's overall history and heritage.

## Recommendation 9: Advocate for a Fair Pay Policy for Musicians

**Timeline: Medium-term (1-2 years)**

Community stakeholders have revealed that musicians are not properly remunerated for their art and cannot survive solely on the income they receive from the music ecosystem. Holding multiple jobs ensures that they have insurance and resources to support their craft, rather than the craft supporting them. As such, there is a need for fair compensation for musicians that takes into account the service they provide and hours practiced, the process of preparation, size of the venue, audience count, the size of the band, event costs, and promotion. There is a need to establish trust between the artists and venues, and to create a standard and minimum payment that must be respected. Musicians want and deserve healthcare, childcare, and guaranteed income.

With this in mind, the GMMC should advocate for a Fair Pay Policy and subsequent guide for local artists, promoters and venues to create fair deals that help the creatives and the music ecosystem on a wider scale. It needs to be an arrangement where all sides (venues, promoters, artists, and administrators) agree to work together to strengthen the music sector. The more stable and sustainable the sector becomes, the more attractive the city will be. Through raised awareness, all members of the music industry will be accountable for creating fair pay opportunities and in turn, a more resilient community.

### Goals:

- Create more equitable work conditions for music artists and professionals, which contributes to the economic viability of the City
- View arts sectors and the music ecosystem as valuable assets to the City's economy
- Cultivate partnerships between venues, promoters, artists, and other business owners

### How to implement it:

- Since “fair pay” for artists can have a range of meanings when taking experience, practice time, and overall skill into consideration, it should be determined in consultation with the Madison Area Musicians’ Association, the GMMC, and local industry stakeholders.
  - In general, “fair pay” should account for the price of living in the Greater Madison area and the assumption that full-time musicians should be able to afford housing, transportation, food, healthcare as well as business-related expenses like rented rehearsal space and equipment repair
- Once a rate, or pay ladder, is determined, the City should work towards gaining the support commitments of venues, promoters, and organizations, artists
- Advice for artists in the Guide would need to include negotiation advice with venues, such as turning down performance opportunities that don’t provide fair remuneration (i.e a reasonable cut of ticket sales); how to work with venues to promote a gig; and tips on requesting detailed information from venues ahead of a gig, such as sound checks, dressing rooms, load-in details, and logistical arrangements
- Advice for venues should highlight best practices including how to cover diversity quotas in programming and how to guarantee the adequate collection and distribution of copyright revenues.
- Create a ‘Madison Venues Fair Pay Certificate and Badge’ to be awarded to venues that comply with the Fair Pay Guide. This can be displayed in the venue
- Talk to funding organizations to develop a points system for applications from festivals and venues to attach demonstrable proof that they comply with fair play requirements (ie. image of Madison Venue Fair Play Certificate)

## FAIR PLAY GUIDE AND FAIR PLAY VENUES DATABASE - UK

**What Is It?** The Fair Play venue scheme aims to “recognise good practice and stamp out the unfair treatment of musicians”. Venues can adhere to the scheme by supporting the fair treatment of musicians and opposing pay-to-play and unfair ticketing deals.<sup>129</sup>

The Fair Play guide contains advice for self-promoting artists in areas such as fair co-promotion deals, participating in competitions and showcase events and submitting applications to perform at festivals. Musicians can submit their positive experiences at venues to get the owners involved in the Fair Play scheme. After evaluation, the venues receive a sticker to display as a badge of their respect for artists.

<sup>129</sup> Musicians’ Union (2019) “Fair Play Venues”. Online at <https://www.musiciansunion.org.uk/Home/Advice/Playing-Live/Gigs-and-Live-Entertainments/Fair-Play-Venue-Database> accessed 05-05-2022

**Who Is Responsible?** The Musicians' Union advocates and promotes activism for musicians in the UK.

**What Has It Done?** The Musicians' Union website includes a database of Fair Play Venues that endorse the principles of the Fair Play Guide, publicly accessible online. As of 2019, the database contains over 130 venues across the UK that have adhered to the scheme.

The website has continued providing up-to-date advice for musicians on how to navigate life as professional artists. Some of their most recent blogs include one on [busking](#) written in 2021 and [how to navigate residencies](#) written in 2022.

**Lesson for Madison:** Creating a Fair Play Guide for venues strengthens the music ecosystem by creating equitable working conditions for musicians and music professionals and strengthening connections between music consumers and performers. Providing a system of recognition for venues that abide by the Guide's suggestions also serves to foster a welcoming and communal environment.

## Recommendation 10: Develop a Grant Program Specifically Geared Towards Diversifying the Music Ecosystem

**Timeline:** Medium-term (1-2 years)

There is enthusiasm for a broader spectrum of events, but the infrastructure necessary to support new businesses, artists, and organizations is not currently available. There needs to be room for all genres, especially Hip Hop, to shine rather than a spotlight being reserved for a select few. Stakeholders asserted that while Classical, Jazz, and Rock are in the top promoted genres, almost every other genre falls short of visibility and institutional support. There is little venue consistency in terms of hosting Hip Hop and Black culture-related events, and a need for a place for Black, Indigenous, and people of color (BIPOC) to perform. Madison is missing locally owned diverse venues, adequate genre and cultural representation, and venues that promote original music. This points to a need for a variety of venues, bars and clubs that support various genres. One way to achieve this is by allocating resources specifically geared towards supporting, promoting, and increasing visibility for new business owners and artists of differing styles, particularly those representing marginalized demographics and genres.

### Goals:

- Diversify cultural offerings in Madison by encouraging and incentivizing new businesses, artists, and cultural organizations
- Create opportunities for underrepresented businesses and business owners, artists, organizations, and genres
- Attract tourists and people of different demographics to Madison by expanding the realm of events and activities that they can participate in

#### How to implement it:

- The grant program should have quarterly submission deadlines in order for a broad range applicants to have access to the resources
- While many grant programs require organizations and businesses to match their financial contributions, it should be occluded in this case given the barriers that exist to the success of marginalized business owners
- Some examples for funding use include:
  - New equipment for live performance venues
  - Events that promote local artists and specifically artists of color
  - Acoustic upgrades to repurposed performance spaces
  - Performances that include “talk-backs” in order to educate audience members on various artistic forms and musical genres

#### GRANTS FOR NIGHT-TIME DIVERSIFICATION - SYDNEY, AUSTRALIA<sup>130</sup>

**What Is It:** The Australian capital has different grants and sponsorships to support qualifying for-profit and not for-profit organizations in several business development areas. One of their programs is a night-time diversification grant that supports local businesses in attracting customers in the evenings by trialing new events and activities. The baseline objective is to increase the diversity of traders and programming offered in Sydney between 6 p.m. and 10 p.m., aligning the vision and commitment of the City to support its night time economy.

This City-led grant has two funding rounds per year and provides up to AU\$30,000 cash in matched funding for each organization over the course of one or two years. The City of Sydney encourages businesses to be creative in their proposals, including ideas to attract customers such as collaborating with similar brands,

<sup>130</sup> City of Sydney (2019) “Night Time Diversification.” Online at <https://www.cityofsydney.nsw.gov.au/community/grants-and-sponsorships/business-grants/business-support-grants/night-time-diversification> accessed 19-01-2022

organizing networking and storytelling events or inviting designers for ‘How-to’ sessions.

Awarded businesses must collect information on different performance areas for verification purposes (e.g. the number of paid staff, number and/or value of partners or sponsors, percentage of increase in revenue from activities or photos/videos). This information is used to hold beneficiaries accountable for the grant, as well as to contribute to studies on Sydney’s night time economy in its different neighborhoods, from foot traffic analysis to economic impact analysis.

**Who is Responsible:** City of Sydney

**What Has It Done:** So far the grant has funded:<sup>131</sup>

- New staging and audio equipment at The Roosevelt in Potts Point
- Live music and performance nights featuring local artists at the Imperial Hotel in Erskineville
- Upgrades to mixing equipment, PA systems, and speakers at the Oxford Art Factory in Darlinghurst and The World Bar in Kings Cross
- Upgrades to audio equipment and in-house musical instruments at Hudson Ballroom in the city center
- Acoustic upgrades at the Knox Street Bar and Freda’s in Chippendale and Staves Brewery in Glebe
- A monthly program of music trivia, slam poetry and live music in the foyer of the City Recital Hall in the city center
- An after-midnight live music and dining program at Foundry 616 in Ultimo
- Fortnightly ‘paint and sip’ evenings and ‘beanbag and popcorn’ arthouse movie nights at The Tribe creative retail store in Darlinghurst
- Small-scale cabaret performances between theater seasons at the Eternity Playhouse in Darlinghurst
- Fortnightly ‘in conversation’ evenings with local authors at Ariel Bookshop in Darlinghurst
- New flooring, staging and lighting at the East Sydney Community and Arts Center in Darlinghurst

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<sup>131</sup> Live Music Office (2018) “Grants Give Sydney’s Nightlife a Major Boost.” Online at <https://livemusicoffice.com.au/grants-give-sydneys-nightlife-a-major-boost/> accessed 19-01-2022

**Lesson for Madison:** Providing funding for current businesses to diversify their offerings while working to give opportunities to new prospective businesses gives broader demographics reasons to engage in Madison's music economy. Sydney's Night Time Diversification Grant is an excellent example of how to empower the business community to be innovative with their offerings.

## Recommendation 11: Create a Directory of Music Businesses and Local Talent

**Timeline:** Short-term (0-12 months)

A directory highlighting businesses, talent, and organizations is an excellent way to build community throughout the music ecosystem. This directory needs to include contact information which is regularly updated with any new individuals, organizations, or stakeholders and keep track of the changes between the sectors.

### **Creating a directory of downtown businesses would support the following goals:**

- Cultivate a thriving music ecosystem through collaborative partnerships and strengthened relationships
- Ease the path of access for those wishing to participate in the music ecosystem by allowing them an easily accessible platform to find goods and services and promote themselves
- Create a welcoming atmosphere and community

### **How to implement it:**

- This directory should be free to access and list in, and it should be conveniently accessible online, ideally on the Cultural Office's website
- Each listing must include all contact details and basic business information, this could mean a link to their website and socials, a phone number, an e-mail address, etc.
- The directory should be regularly audited and updated by Cultural Office staff to include the most current information on the music community
- The directory can be split into different sections highlighting equipment, marketing, creative professionals, venues, etc.

- The directory should be promoted by the Cultural Office in order to encourage participation within the sector

## MUSICPORTLAND INDUSTRY DIRECTORY - PORTLAND, OR<sup>132</sup>

**What Is It:** The MusicPortland Industry Directory was established in February 2021 as a database of artists and music-related businesses and other industry professionals. Recognizing that word-of-mouth and in-person networking can only go so far, the database is a hub for Portland’s music ecosystem and a way for interested parties to make connections and get in contact with each other. The Directory sections will be released gradually; the first section launched highlights Instruments and Gear. This section includes contact information for local:

- Music manufacturers
- Instrument retailers
- Gear rental
- Instrument repair
- Music technology businesses

Future sections of the database will focus on production, professional and creative services, venues and festivals, and marketing, distribution, and licensing.

**Who is responsible:** MusicPortland is a grassroots trade association and advocacy group

**What has it done:** The first section of the database, focused on Instruments and Gear, launched in the first quarter of 2021. Since then 43 businesses have been added to the section. The section includes a wide variety of businesses including everything from audio recording monitor manufacturers to guitar repair and violin makers.

**Lesson for Madison:** Developing a database of music-related businesses and practitioners eases the barrier of entry for new practitioners while providing resources for current businesses to connect with each other. It also opens the door

<sup>132</sup> Music Portland (2021) “The MusicPortland Industry Directory is Now Live!” Online at <https://musicportland.org/news-updates/2021/2/24/the-musicportland-industry-directory-is-live> accessed 05-05-2022

for future networking opportunities and provides a central locale for music-related businesses to collaborate on events and business endeavors.

## SUSTAINABLE DEVELOPMENT GOAL/S AND TARGET/S:



**Target 8.3:** Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship, creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services

**Target 8.9:** By 2030, devise and implement policies to promote sustainable tourism that creates jobs and promotes local culture and products



**Target 9.1:** Develop quality, reliable, sustainable and resilient infrastructure, including regional and transborder infrastructure, to support economic development and human well-being, with a focus on affordable and equitable access for all

**Target 9.5:** Enhance scientific research, upgrade the technological capabilities of industrial sectors in all countries, in particular developing countries, including, by 2030, encouraging innovation and substantially increasing the number of research and development workers per 1 million people and public and private research and development spending





**Target 11.4:** Strengthen efforts to protect and safeguard the world's cultural and natural heritage

### 3.4 Education

Our findings indicate a need to ensure that all children have access to music in school or out of school, since many children in the Madison Metropolitan School District don't have the opportunity, access, or funding to engage in costly private lessons. Many young people of a certain socioeconomic status are not actualizing their potential as musicians because they can't afford further instruction. Some even stop participating in options available through school, such as band, because they are not trained in the necessary skills (e.g. music theory, aural skills, reading) to keep up with their peers. A city-wide music education initiative could work towards eliminating the barriers to music education.

The economic impact assessment indicates an urgent need for creating a specific leadership platform that focuses on talent development and retention in the music sector dedicated to underrepresented populations who are interested in becoming music professionals. The economic impact assessment shows that White workers earn more than Black and Asian workers. In the music ecosystem, White-identified workers earn 122% more than Black / African Americans and 136% more than Asian workers. In the rest of the economy, White workers earn 58% more than Black / African Americans and 19% more than Asian workers.<sup>133</sup>

The pay gap can be further explained by the differences in access to higher-paid positions (ie. managerial). Within the music ecosystem, most of the managers are White (70.8%), followed by 29.1% of Asian managers. However, based on the sampling from the American Community Survey (ACS), no managers in the music ecosystem that are Black/African American were identified, nor were workers from other races. Such distribution of managerial roles, according to race, is similar to the rest of the local economy, however, it is more diverse, with 92.2% of managers being White, 1.9% Black/African American, 3.9% Asian, and 1.7% from other races.

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<sup>133</sup> Differences of income between White workers and the rest of workers from the music ecosystem is not significant (p-value = 0.0978). However, the differences of income between white workers and the rest of workers from the rest of the economy is significant (p-value = 0.0000).

The City of Madison’s 2013 Performing Arts Study assessed the performing arts environment including existing and potential audiences. The Study concluded that expansion of demand may be possible, up to 35%, but “would require rethinking supply and examining potential for significantly new or different programs, venues and formats.”<sup>134</sup> Additionally, community stakeholders have shown that many people in the local community are unaware of the events occurring in Madison; this can be tied to a lack of commercial and marketing work to promote artists and events. There is a need to educate the community and communicate the value of having a diverse music ecosystem and a multitude of cultural offerings. This can be done by incorporating audience development into cultural arts planning.

The following recommendations identify education initiatives that should be addressed to ensure that the music ecosystem in Madison is sustainable and inclusive.

## Recommendation 12: Begin a City-Wide Music Education Initiative

**Timeline: Medium-term (1-2 years)**

Our findings indicate a need to ensure that all children have access to music in school or out of school, since many children in the Madison school district don’t have the opportunity, access, or funding to engage in costly private lessons. Many young people of a certain socioeconomic status are not actualizing their potential as musicians because they can’t afford further instruction. Some even stop participating in options available through school, such as band, because they are not trained in the necessary skills (e.g. music theory, aural skills, reading) to keep up with their peers.

Madison should work to implement a city-wide music education initiative that would be a public/private partnership between Madison Metropolitan School District, the Mayor of Madison, the GMMC and the Madison music community. An initiative that ensures that all public school students, K-12, have access to a varied music education curriculum that reflects the current music genres, new technologies and diverse student population would go a long way toward creating and sustaining an equitable music ecosystem. Partners of the project could include the GMMC, the Madison Arts Commission, and local colleges and universities.

### Goals:

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<sup>134</sup> City of Madison (2013) “Performing Arts Study.” Online at <https://madison.legistar.com/View.ashx?M=F&ID=2638759&GUID=235F9A76-D290-48A8-881E-A481D7E02E91> accessed 03-02-2022

- Support the next generation of musicians and songwriters by introducing them to vital skills early on in their development
- Develop music audiences and participants from childhood
- Improve cognitive abilities and creativity among children
- Support children from lower-income families who may not have access to music education

### How to implement it:

- An advisory council made of staff and stakeholders from the Madison Metropolitan School District, the Mayor's Office, the Cultural Office, and the GMMC should be convened in order to reach a consensus on the music standards, activities, and classes that all students have access to. These could include, but are not limited to:
  - General courses in choir, band, orchestra, wind, string ensemble groups, and music appreciation
    - These must also introduce students to genres like hip-hop, rock, folk, and jazz
  - Courses that focus on music of the African diaspora, Latinx culture, etc.
  - Courses that introduce students to songwriting, music technology, recording, production, and music business
- The consensus reached above should set the foundation for a District wide campaign to increase music education, and specifically the diversity of music education. In order to raise awareness, these ideas should be introduced at PTA meetings, school assemblies, in existing music classes, and school district meetings to further galvanize support
- Capacity building will need to take place in order to offer the breadth of courses necessary across the district. In order to procure funding, this should be a public/private partnership capable of receiving both school budgetary allocations as well as private donations
  - Local artists should be among the first considered for these positions and should be paid according to the determinations made in [recommendation 9](#)
- An online hub for teachers, organizers and professional artists should be created for them to communicate and share resources and information
  - Schools should be able to crowdfund more resources for their specific program offerings through the online hub

## MUSIC MAKES US - NASHVILLE, TN<sup>135</sup>

**What Is It:** This initiative is a public/private partnership with Metro Nashville Public Schools, the Mayor's Office and the Nashville music community. The program's main goal is to eliminate barriers to music education and increase student participation while adding a contemporary curriculum that embraces new technologies and reflects the diverse student population. Policy and Advocacy partners of the project include the SupportMusic Coalition, the National Association for Music Education, Americans for the Arts and Music For All.

**Who is responsible:** Metro Nashville Public Schools, the Mayor's Office, and the Nashville music community

**What has it done:** The program, which is both privately and publicly funded, offers music in all zoned K-12 Metro Nashville Public Schools. Elementary music is standards-based and provided during the school day to all students by certified music specialists. At the middle school level, music instruction is offered at all schools as an elective. High school music courses are co-curricular electives and may fulfill fine arts graduation requirements.

Courses vary by school and offer diverse programming such as Production/Recording, Mariachi, Hip-Hop, Bluegrass, Music Theory, Songwriting, Rock and World Percussion. This variety helps support the next generation of songwriters coming from the city by introducing them to vital skills early on in their education.

Partnerships and program selection are enabled via an Online Hub of professional artists and organizations that acts as a marketplace for students and teachers in the Metro Nashville Schools. Artists and professionals can publish their courses to the platform, providing details on the program, populations and fees, as well as contact information. The Online Hub not only promotes the music programs but also helps facilitate communication and scheduling and assists teachers with the cost of programs by providing subsidies. Schools may request funding assistance online for several programs at a time. The amounts awarded by Music Makes Us vary based on available funds and the cost of the selected programs.

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<sup>135</sup> Music Makes Us (2019) "Home". Online at <https://musicmakesus.mnps.org> accessed 05-05-2022

**Lesson for Madison:** Creating a city or city-wide music initiative ensures that youth are exposed to music-related careers at young ages and that music professionals and performers have other opportunities to gain experience and employment. Instead of music being a solo endeavor, as was reported by stakeholders, music initiatives help foster an interconnected environment where collaboration and mutual engagement take place.

## Recommendation 13: Implement Training Programs to Make Music Ecosystem Leadership More Inclusive of Marginalized and Underserved Populations

**Timeline:** Medium-term (1-2 years)

There is an urgent need for creating a specific leadership platform that focuses on talent development and retention in the music sector dedicated to underrepresented and underserved populations who are interested in becoming music professionals. This program could start small by offering free and accessible masterclasses or learning itineraries that are available online and can be replicated by a variety of community groups and organizations. However, the idea is for the program to expand and be able to provide a variety of resources like permitting workshops, new business grants and incentives, and innovative rent programs. This pathway to leadership should also consider fair pay measures as well as the necessity of developing a pipeline and training and resources to continue ushering others into leadership roles as needed. Having an inclusive atmosphere is important for developing a thriving and sustainable music ecosystem and ensuring that minoritized populations are seen in leadership roles is an important step toward this goal.

### Goals:

- Eliminate persistent racial disparities in access to jobs, leadership and engagement with the local and national music industry
- Attract broad demographics of people to Madison through increased diversification of workers and employment opportunities
- Create a sustainable environment for diversity to thrive in the music sector through equitable working conditions and access

## How to implement it:

- The training program should make masterclasses and short, sector-specific learning curriculums available online at free or low-cost in order to maintain accessibility; it should be updated throughout the year to promote continued education
  - Masterclasses and curriculums can highlight different topics like music artistry, music business, and arts administration
- Masterclasses and curriculums should be well-promoted across the area to various organizations, educational institutions, etc. in order to spread the word
- A certificate program could be developed from the classes, which gives participants of a certain number of classes on any specific topic some form of credential to take with them and build from
- In addition to free online training programs and curriculums, partnerships with local businesses and organizations to give aspiring artists and professionals more hands-on experience in the industry should be considered as resources for marginalized demographics to gain further training, resources, and space to develop the relevant skills to own and operate businesses or run organizations
- These partnerships and resources should be centralized and coordinated through a talent pipeline management strategy, led by the City (or an external organization), that connects members in the community with the right stakeholders to support their business activities and present them with upcoming opportunities
- In order to attract these businesses a certain amount of local outreach should be conducted; promotional events and workshops would be a good step toward welcoming businesses
- Incentivization methods for partnerships with current businesses should be considered, such as special certifications as mentioned in previous recommendations
- Fair pay should be a condition of any current businesses looking to hire newly trained business operators and staff from marginalized communities

## WOMEN'S FUND FOR MEDIA, MUSIC, AND THEATER - NEW YORK CITY<sup>136</sup>

**What Is It:** In 2018, New York City's Mayor's Office of Media and Entertainment (MOME) and the New York Foundation for the Arts (NYFA) created the NYC Women's Fund for Media, Music and Theater. The \$5 million grant programme was initially launched to financially support women-identifying individuals in the pursuit of various film, digital and theater projects.

The fund is awarded to any individual who identifies as a woman regardless of "actual or perceived sex, gender, gender identity or gender expression, sexual orientation, age, religion, creed, partnership status, marital status, disability, race, color, national origin, alienage, citizenship status, military status, or any other class protected by City, State, or Federal law".

**Who is responsible:** New York City's Mayor's Office of Media and Entertainment (MOME) and the New York Foundation for the Arts (NYFA)

**What has it done:** During the first year, a total of \$1.5 million was awarded to 63 film, digital and theater projects in the initial round.

The fund was expanded in 2019 to financially support women pursuing music too. Qualifying projects, which are eligible for awards of up to \$20,000, include independent EPs, albums, and videos with a significant female credit for production, engineering or musical lead.

**Lesson for Madison:** Creating a fund that enables marginalized demographics to develop music and entertainment businesses is a way to diversify Madison's cultural offerings, attract multiple demographics, and create a welcoming atmosphere for visitors and residents alike.

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<sup>136</sup> City of New York (2019) Applications Open for NYC Women's Fund for Media, Music and Theater. Online at <https://www1.nyc.gov/site/mome/news/07102019-nyc-womens-fund.page> accessed 25-01-2022

## Recommendation 14: Incorporate Audience Development into Cultural Arts Planning

Timeline: Medium-term (1-2 years)

The City of Madison’s 2013 Performing Arts Study assessed the performing arts environment including existing and potential audiences. The Study concluded that expansion of demand may be possible, up to 35%, but “would require rethinking supply and examining potential for significantly new or different programs, venues and formats.”<sup>137</sup> Additionally, community stakeholders have shown that many people in the local community are unaware of the events occurring in Madison; this can be tied to a lack of commercial and marketing work to promote artists and events. There is a need to educate the community and communicate the value of having a diverse music ecosystem and a multitude of cultural offerings.

Audience development is about growing your audience and creating a better relationship between the City’s arts and cultural ecosystem and its local and visitor patrons. In order to expand audiences, Madison should incorporate audience development into its cultural arts planning and take clear steps to purposely improve it. Audience development can be done in a number of different ways including marketing and promotion, reward and discount programs, culturally diverse events and collaboration with existing programs, etc.

### Goals:

- Increase consumption of cultural arts among locals
- Increase the number of visitors to cultural and arts events
- Improve audience confidence and diversify audience participation in the arts
- Promote and support the cultural arts ecosystem in Madison
- Attract diverse audiences of all ages to participate in the local cultural economy

### How to implement it:

- The GMMC, the Madison Arts Commission, and other relevant organizations should include audience development objectives in their strategic planning processes
  - Examples of objectives include: growing local and regional participation in the music sector, educating the local community about the importance of artistic performance and engagement, etc.

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<sup>137</sup> City of Madison (2013) “Performing Arts Study.” Online at <https://madison.legistar.com/View.ashx?M=F&ID=2638759&GUID=235F9A76-D290-48A8-881E-A481D7E02E91> accessed 03-02-2022



- Visit Madison and GMMC should work together to promote upcoming independent and grassroots venues and organizations to engage new audiences and increase awareness of what is happening in the city. Examples include:
  - An audience loyalty program would assemble different organizations and venues with the purpose of increasing audience engagement. It could be a paid membership program with different price tiers linked to advantages and exclusive offers
  - The City and relevant organizations could create audience discount/reward programs like a transportation reward that could offer ‘entertainment tokens’ to those who ride public transit to cultural events and venues. This could be done by tracking the account of the user via monthly passes or a mobile app

## NIGHT OUT AND YOUNG PROMOTERS SCHEME, WALES

**What Is It:** Night Out<sup>138</sup> is an Arts Council of Wales (ACW) scheme that helps local organizations to bring professional performances into community buildings at subsidized prices. This scheme helps hundreds of community groups across Wales to bring the arts to the heart of their communities by selecting and hosting professional performing arts events in non-traditional smaller scale venues (mostly village halls and community centers). Through the scheme small communities can access great art in a familiar, friendly space and artists can enjoy performing in small, informal spaces, with more intimate audiences. Night Out works throughout the year with local, national and international artists and covers a broad spectrum of the performing arts from theater and circus to music and puppetry.

**Who is responsible:** Arts Council of Wales (ACW)

**What has it done:** Community groups (known as Promoters) can choose from a huge range of great professional performers and book them into community or village halls and other non-traditional venues across the country. Working in conjunction with the local authorities of Wales, the Night Out team operates a guarantee against loss for events, where ACW pays the performer fee and the community promoter pays back ticket income made at the door. Usually, about 250-300



<sup>138</sup> Arts Council of Wales (2018) “The Night Out Scheme”. Online at <http://www.nightout.org.uk/performers-info/about-night-out.aspx> accessed 05-05-2022

companies/performers get booked through the scheme each year across all the art forms. ACW averages about 580 events a year, so many companies get only a couple of bookings through the scheme, though some can get longer tours.

Additionally, the award-winning Young Promoters Scheme works with groups of children and young people taking them through the process of becoming the promoters for an event in their community.<sup>139</sup>

**Lesson for Madison:** A programme like this gets the community involved, brings the economic and social benefit of the music industry to smaller centers and venues outside of the downtown area, can bring to life unused and underutilized spaces, and gives young people practice at organizing and promoting events.

#### SUSTAINABLE DEVELOPMENT GOAL/S AND TARGET/S:

|  |  |
|--|--|
|  <p>4 QUALITY EDUCATION</p>               | <p><b>Target 4.1:</b> By 2030, ensure that all girls and boys complete free, equitable and quality primary and secondary education leading to relevant and effective learning outcomes</p> <p><b>Target 4.4:</b> By 2030, substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship</p> <p><b>Target 4.5:</b> By 2030, eliminate gender disparities in education and ensure equal access to all levels of education and vocational training for the vulnerable, including persons with disabilities, indigenous peoples and children in vulnerable situation</p> |
|  <p>8 DECENT WORK AND ECONOMIC GROWTH</p> | <p><b>Target 8.3:</b> Promote development-oriented policies that support productive activities, decent job creation, entrepreneurship,</p>   |

<sup>139</sup> Arts Council of Wales (2018) “Young Promoters Scheme”. Online at <http://www.nightout.org.uk/night-out/night-out-young-promoters-scheme.aspx> accessed 05-05-2022

|   |   |
|---|---|
|   | <p>creativity and innovation, and encourage the formalization and growth of micro-, small- and medium-sized enterprises, including through access to financial services</p> <p><b>Target 8.5:</b> By 2030, achieve full and productive employment and decent work for all women and men, including for young people and persons with disabilities, and equal pay for work of equal value</p>  |
|    | <p><b>Target 10.2:</b> By 2030, empower and promote the social, economic and political inclusion of all, irrespective of age, sex, disability, race, ethnicity, origin, religion or economic or other status</p> <p><b>Target 10.3:</b> Ensure equal opportunity and reduce inequalities of outcome, including by eliminating discriminatory laws, policies and practices and promoting appropriate legislation, policies and action in this regard</p> <p><b>Target 10.4:</b> Adopt policies, especially fiscal, wage and social protection policies, and progressively achieve greater equality</p> |
|  | <p><b>Target 11.4:</b> Strengthen efforts to protect and safeguard the world's cultural and natural heritage</p>  |
|  | <p><b>Target 16.6:</b> Develop effective, accountable and transparent institutions at all levels</p> <p><b>Target 16.7:</b> Ensure responsive, inclusive, participatory and representative decision-making at all levels</p>  |

## 4. Implementation Timeline

|  | Year 1 | Year 2 | Year 3 |
|--|--------|--------|--------|
| <b>Zoning and Planning</b>   |        |        |        |
| 1. Establish a Cultural Office   | ■      | ■      |        |
| 2. Incorporate the Agent of Change Policy to Protect Live Music Venues   | ■      | ■      |        |
| 3. Develop New Entertainment, Cultural, and Creative Districts   | ■      | ■      | ■      |
| 4. Review and Revise Sound Ordinance Policies  | ■      | ■      |        |
| <b>Licensing and Regulations</b>   |        |        |        |
| 5. Implement a Busking Policy and Revise Downtown Performance Permit   | ■      | ■      |        |
| 6. Create a Best Practice Guide for Live Music Venues Detailing All Relevant Regulations, Policies, and Ordinances | ■      | ■      |        |
| 7. Develop a Sustainability Guide for Music Venues and Events  | ■      | ■      |        |
| <b>Economic Development</b>  |        |        |        |
| 8. Design a Cultural Tourism Plan  | ■      | ■      |        |
| 9. Advocate for a Fair Pay Policy for Musicians  | ■      | ■      | ■      |
| 10. Develop a Grant Program Specifically Geared Towards Diversifying the Music Ecosystem                           | ■      | ■      | ■      |
| 11. Create a Directory for Music Businesses and Local Talent   | ■      | ■      |        |
| <b>Music Education</b>   |        |        |        |

|  |  |  |  |  |  |  |
|--|--|--|--|--|--|--|
| 12. Begin a City-Wide Music Education Initiative   |  |  |  |  |  |  |
| 13. Implement Training Programs and Incentives to Make Music Ecosystem Leadership More Inclusive of Marginalized and Underserved Populations |  |  |  |  |  |  |
| 14. Incorporate Audience Development into Cultural Arts Planning   |  |  |  |  |  |  |

|                          |  |
|--------------------------|--|
| Short-term (0-12 months) |  |
| Medium-term (1-2 years)  |  |
| Long-term (2+ years)     |  |

## 5. Conclusion

The City of Madison is passionate about creating an environment where artists and other music professionals can thrive and, further, where there is an equitable distribution of resources and opportunities for the entire music ecosystem. Through initiatives to correct historical injustices, including discrimination against genres that are associated with people of color, and expanded educational opportunities, the City has made incredible strides; however, there is still much work to be done.

While grassroots initiatives like Greater Madison Music City (GMMC) are working to rebuild the City of Madison's music ecosystem on a foundation of passion and equity, the tangible infrastructure and support mechanisms necessary for the system to grow are missing. Funding repositories change year to year, permitting processes are not as efficient as other comparable cities, and noise regulations are broad and do not have policies, like Agent of Change, in place to protect venues and live events from complaints.

Despite lacking a formal cultural office or council, the Greater Madison Music City Project is laying the groundwork for serving as the connective tissue for the sector and advocates for the above policies as well as others that provide the conditions for a better, more inclusive ecosystem. Still, a formal office or music officer within local government will be the key in unlocking impactful and long-lasting policy changes and initiatives to serve the ecosystem and can work hand in hand with the Greater Madison Music City Project and other stakeholders.

The City of Madison has all the tools and support it needs to create a productive and generative environment for its many talented and innovative creatives. Building up the City's regulatory infrastructure and doubling down on equitable conditions for marginalized communities who bring vibrancy to the sector will help the City get to the next level.

## 6. Detailed Methodology

### 6.1 Work Group Roundtable and SWOT Assessment Led by the Greater Madison Music City Project

To complement the work completed by Sound Diplomacy, The Greater Madison Music City Project conducted four work group discussions to complete a SWOT analysis to help inform our data. These work groups were divided into the following categories:

- Tourism and Music Hub
- Equity and Artist Relations
- Partnerships and Business Connections
- Economic Impact

### 6.2 Mapping

Sound Diplomacy delivered a mapping template for The Greater Madison Music City Project to use to perform their own local asset mapping. The mapping identified music-related assets in Dane County, with a special focus on the City of Madison. The results helped inform the economic impact assessment.

### 6.3 Economic Impact Assessment

- The economic impact analysis is macroeconomic research, which is based mainly on official secondary sources and statistics, complemented by primary research conducted by Sound Diplomacy. It provides a reliable measure of the economic importance of the music ecosystem in Dane County's economy on three different scales: direct, indirect, and induced impact.
- The results contained in this report correspond with data from 2018 and previous years. This is because most of the official data sources used have a three-year delay.

For instance, during the research process, the most updated version available for the County Business Patterns and RIMS II multipliers was data from 2018.

| ECONOMIC IMPACT                 | DEFINITION  |
|---------------------------------|---|
| <b>Direct Economic Impact</b>   | The direct impact is the economic activity directly connected to the music ecosystem, such as musicians, agents and venues.   |
| <b>Indirect Economic Impact</b> | The indirect impact is supportive activity of the suppliers of the music ecosystem and is related to local businesses that provide goods and services, such as advertising, transportation and legal affairs. |
| <b>Induced Economic Impact</b>  | Induced impact is created when the workers of the whole music ecosystem spend their wages on food, transportation, entertainment, etc. in their daily life.   |

Table 1. Economic impact definitions  
Diplomacy

Developed by: Sound

The variables evaluated as part of the Economic Impact Assessment are: music ecosystem output, employment, gross value added (GVA), workers' compensation or wages, and the average income of music ecosystem workers.

| VARIABLE  | DEFINITION   |
|---|--|
| <b>The music ecosystem output<sup>140</sup></b>   | All produced goods and services of the music ecosystem in Dane County. For example, concert ticket sales, recording studios services, etc.   |
| <b>Music ecosystem employment<sup>141</sup></b>   | The number of active jobs in the production of music ecosystem goods and services.   |
| <b>Music ecosystem compensation<sup>142</sup></b> | Remuneration (including wages and salaries, as well as benefits such as employer contributions to pension and health funds) payable to employees in return for their music ecosystem work during a given year. |

<sup>140</sup> Bureau of Economic Analysis (2017)

<sup>141</sup> Ibid.

<sup>142</sup> Ibid.

|   |   |
|---|---|
| <b>Gross value added (GVA)<sup>143</sup></b>                    | The music ecosystem output minus music ecosystem intermediate consumption (the costs of all inputs – for example, equipment rented by a live music promoter). |
| <b>The annual average income of the music ecosystem workers</b> | Describes the average income of the music ecosystem workers based on several variables such as sex, age, race, etc.   |

Table 2. Variables definitions

Developed by: Sound Diplomacy

## Classifications

In order to define and frame the music ecosystem according to the official data available we use two standard classifications:

### **The Classification of Economic Activities of the North American Industrial Code 2017**

**(NAICS)** is the standard used by federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. It was used to calculate the economic activity in Dane County that is attributable to the definition of the music ecosystem (see [Appendix 1.1](#)).

**The 2018 Standard Occupational Classification (SOC) system** is a federal statistical standard used by government agencies to classify workers into occupational categories for the purpose of collecting, calculating, or disseminating data. It was used to calculate the average income of the music ecosystem workers in Dane County.

## Geographical Scope

The geographic scope of this assessment is limited to Dane County and specifies the contribution of Madison, Wisconsin to the county's music ecosystem.

## Data Sources

Six main data sources have been used to conduct the economic impact analysis in Dane County:

| DATA SOURCE | DETAILS |
|-------------|---------|
|-------------|---------|

<sup>143</sup> Ibid.



|  |  |
|--|--|
| <b>County Business Patterns: 2018</b>                                | This source allows the calculation of the number of establishments and employees in Dane’s music ecosystem by detailed industry. It also allows calculating the share of music ecosystem establishments within the state of Wisconsin.   |
| <b>BEA Regional Economic Accounts GDP by State 2001 - 2018</b>       | This source provides GDP data according to the big industries at the state and metropolitan levels.  |
| <b>Regional Input-Output Modeling System (RIMS II)<sup>144</sup></b> | RIMS II provides both Type I and Type II regional input-output multipliers to estimate the indirect and induced economic impact of the NAICS economic activities at the county level.<br><br>Type I multipliers account for the direct and indirect impacts based on the economic dynamics of the music ecosystem supply chain. Type II multipliers account for both indirect and induced impacts based on the purchases made by employees of the music ecosystem. |
| <b>The American Community Survey 2015 - 2019</b>                     | This source allows for identifying the average income of the different workers in the economic activities associated with the music ecosystem.   |
| <b>Quarterly Census of Employment 2001-2019</b>                      | This source provides the employment information per North American Industry Classification System, NAICS activity. From the latter, the details used are for the activities associated with the music Ecosystem. <sup>145</sup>  |
| <b>Sound Diplomacy primary data</b>                                  | This data, collected through roundtables, surveys, and the mapping of agents, enables us to identify missing data and data that does not necessarily correspond to the music ecosystem but that was found in the official databases.   |

Table 3. Data sources  
Diplomacy

Developed by: Sound

## 6.4 Regulatory Assessment and Comparative Analysis

The regulatory assessment and comparative analysis section is a compilation of the qualitative research that Sound Diplomacy has completed for the Greater Madison Music City Project. The document includes:

- An overview of the policies and regulations analyzed in Des Moines’s music ecosystem and how they compare to other cities benchmarked in the report

<sup>144</sup> See definitions in [Appendix 1.2](#)

<sup>145</sup> See [Appendix 1.1](#)

- A Regulatory Ecosystem section analyzing the administrative and governing environment affecting the music sector in Des Moines
- For benchmarking purposes, the report also includes best practices found in other US and international cities and a comparison of them with the Greater Madison area

## 6.5 Strategic Plan

Stakeholder engagement, mapping and economic impact assessment, and the regulatory assessment result in a strategic plan. The Plan takes the form of recommendations with goals, implementation strategies, and case study examples. It also includes timeline suggestions for how long each recommendation may take to implement.

The recommendations have been grouped into the following strategic areas:

1. Zoning and Planning
2. Licensing and Regulations
3. Economic Development
4. Education

The Plan will be critical to growing and strengthening the role of music in Madison, and supporting the recovery of the music industry and local economy. Following implementation of the plan, Madison should continue to measure the impact of the music ecosystem and the results of the implemented actions for further improvements.

## 7. Bibliography

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## 8. Appendices List

Each appendix has been put into a separate document, for the list of these please see below.

**Appendix 1. Economic Impact Assessment**

**Appendix 2. Regulatory Assessment and Literature Review**