



Victoria Music Ecosystem Study

Final Report, January 2021

Victoria Music Advisory Committee

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Victoria Music Ecosystem Study

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1. Introduction

ABOUT THE PROJECT

First off, thank you for all your trust, collaboration and drive as we worked on this music strategy together and in partnership with the Victoria Music Steering Committee and Music BC. We're proud to share this work with you as a first step in further realization of the plan. When we started this work, we had no indication of a pending worldwide pandemic that would force the global music industry to pause, adjust and realize new ways to survive. As with everything over the last 18 months, we've had to think differently about how to treat music, in all its forms and functions due to COVID-19. But in Victoria, with this data and research, coupled with the regulatory assessment, comparative analysis, economic impact and recommendations, we know, through your leadership, Victoria's music ecosystem can be built back better and thrive. In this work we've realised how diverse, robust and resilient the Victoria music ecosystem is, and this is what has informed each recommendation, through each conversation we've had with you.

So thank you again for this opportunity and we look forward to what's next.

Shain Shapiro, PhD
Founder & Group CEO
Sound Diplomacy

Activation of a Music Vision

Every city around the world is a music city. From street performances, to elevator music and company playlists, we are living in a music city regardless of where we are. What makes a city become known as a music place is the ways in which music is prioritized, organized and activated. Activating the power of a music ecosystem requires a strategy, much like a city has a plan for reducing waste and improving recyclables. To do so, a music city also requires an infrastructure to operate in, which already exists. Where it matters most, however, is how music is curated and integrated into the already existing functions of a city. How is it being treated? Cared for? Protected? When we begin to ask these questions, we begin to recognize the many facets that encompass a music ecosystem. It is also the first step to identifying what structures exist, and which gaps must be filled.

For Victoria, music is already ingrained into its civic heritage and identity. From Nelly Furtado to Hot Hot Heat, the narrative of Victoria's musical history is one of diversity and talent of the highest quality. This narrative reinforces the uniqueness that is Victorian culture. Prior to the global industry freeze brought on by the COVID-19 pandemic, the city continued to reinvest their time into creating more opportunities and advantages for their artists. The global music industry is growing rapidly, perhaps faster than ever before, and despite the hardships

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affecting the live industry, music continues to be consumed at a remarkable rate as artists and music professionals adapt to the parameters of safe entertainment. As such, this study worked to develop progressive opportunities to be inherited in the city, ensuring that Victoria's music ecosystem has a clear pathway to recovery while actively preparing to resume moving forward in the future, harnessing the legacies it has created. From music therapy and technology courses, to collaboration with regional cities, Victoria is on course to become a leader in music city practices. However, the longevity of the industry is dependent upon recovery, adaptability and a desire to learn.

Where the ecosystem now needs the most support is through business assistance systems, crisis relief, and increased opportunities within culturally diverse groups, particularly highlighting the contributions and needs of Indigenous groups. Through benchmarking and literature reviews, the recommendations grounded in this study work to activate these aspects of Victoria's music vision. In addition, the asset mapping and music survey phases identified the music business operations and outputs associated with Victoria's music industry. Doing so helped pinpoint where Victoria must focus their attention in developing soft infrastructures, while also selecting which music-friendly policies suit the climate of the local music community.

Victoria's music community should be celebrated, not only for what has already been accomplished, but for the dedication to building an even stronger future. Moving forward, it is critical that the recommendations in this report are read through a holistic view. Each area of the music sector is much more likely to grow when being developed in conjunction with one another and with the intent of serving the greater good of the community. These actions will be tedious, and they will require extreme care, but they will be worth it.

METHODOLOGY

The scope of this project was to provide an in-depth assessment of Victoria's music ecosystem, which encompassed benchmarking, economic analysis, literature reviews and a comprehensive in-field visit. This set the foundation for personalized interviews and survey analysis, allowing for a deeper understanding of Victoria's music ecosystem. In summary, the music ecosystem in Victoria analysed in this report includes:

- Governance and regulatory functions that are related to music (funding, transportation, education, licensing) on both a provincial and municipal level
- The music industry (recorded, live, production, creation, marketing)
- Hospitality and tourism industries
- Music export programs
- Creative industry actors
- Night-time economy activities

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The process for this study was as follows:

Step 1 - Music Vision and Regulatory Assessment: This included desk research, literature reviews and a regulatory assessment. We also compared the findings to best practices from all over the world from which Victoria can learn.

Step 2 - Stakeholder Engagement: 1,498 respondents participated in an online survey between March and April 2020. 396 were musicians, 968 music fans and 134 music industry professionals. We also conducted 16 roundtables and 20 online and in-person interviews, with over 100 music industry and policy representatives engaged throughout the process.

Step 3 - Quantitative Research: We combined our mapping findings with data from additional sources, such as the Canada Culture Satellite Account, to deliver an economic impact assessment of Greater Victoria's music ecosystem.

Step 4 - Analysis of Key Findings and Strategic Opportunities: This includes an analysis of strengths and challenges in eight strategic opportunity areas: governance and leadership, diversity and equity, audience development, music education, artist and industry development, spaces and places, and music tourism. Each area features key actions and case studies to take forward.

Step 5 - Oversight and understanding of Crisis Relief Measures: Given the global pandemic situation, we have prepared and included an additional component under each strategic area titled *Crisis Relief Measures*.

2. Key Findings

Included below is an overview of some of the key findings from this study. These key findings are further assessed throughout the report. Each of these findings are related to one or more of the ten action areas outlined in the report. Please note that these figures and feedback points were obtained prior to the impact of COVID-19 on the live music sector, and are indicative of a fully-operational music industry. They should be utilized to benchmark goals and outcomes beyond crisis recovery action items. Conclusions and details drawn from this study were also identified through a survey, roundtable discussions and interviews, as well as an economic impact analysis and an asset mapping phase.

- Victoria's Music Ecosystem has a **total GDP** of \$521m
- **3,629 jobs** are directly supported by the Victoria Music Ecosystem
- 30% of artists earn their living almost **exclusively from music**
- There are **17 music festivals and concert series** in Victoria
- 75% of artists do **not have professional support teams** (manager, label, booking agent...)
- Before COVID-19, there were over **110 venues** showcasing music across the capital region
- 68% of local artists rely on **live music income**, 33% have **recorded music sales** and 22% have income from **royalties**
- The British Columbia music economy grew **19.8%** between 2010-2017, credited to a 14% growth in live music and 28% growth in sound recording
- 1.8% of Victoria's **total workforce** works in music
- 38% of the surveyed professionals say that less than 25% of their income is derived from music activities, whereas 46% of those surveyed have an additional source of income performing professional activities in a non music field

STRENGTHS

- Victoria City Council and Mayor are seen as forward-thinking, with a desire to support music and culture.
- Victoria has innovative music education – the University of Victoria’s computer music program is unique and has seen graduates go into music tech jobs with Bandcamp, SoundCloud and Silicon Valley.
- There is an abundance of offerings related to funding programs for musicians and businesses, on all levels of government.
- For a city its size, there is a tremendous amount of music talent in Victoria: it is a place that attracts people with its natural beauty and quality of life.
- There are exemplary progressive music practices in relation to music therapy and music technology, whether through academic or professional practice.
- There are strong traditional music education offerings, from private instrument or vocal lessons to music ensembles in schools.
- Festivals and other outdoor live music events are part of the lure of the city for tourists and new residents and form the identity of Victoria.

WEAKNESSES

- Liquor licensing processes are inadequate and confusing.
- There are few ride-sharing services and very few late-night dining options in Victoria, and many businesses have cut hours.
- There needs to be better education on rate-setting to improve fair pay for music makers across the board, similar to the standards set for visual artists by CARFAC.
- There is a lack of a centralized source of information on music events in Victoria that is easy to access for both event producers/artists and consumers/fans.
- There is not enough ‘soft’ music industry infrastructure, like entertainment lawyers or certified accountants with experience in royalties and industry-specific financial management.
- Victoria’s venue ladder is lacking in mid-sized venues and accessible and welcoming spaces for underrepresented groups (all-ages, differently-abled patrons, LGBTQ+ community, Indigenous musicians).

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- Access to permits in local parks, amongst other music spaces, can be hard to obtain, limiting the opportunities for artists to celebrate cultural diversity or further enhance the social value of the city.
- Participation and representation of diversified groups and marginalized communities are lacking within the music ecosystem as a whole.

OPPORTUNITIES

- Dormant and underutilized spaces can be used to host music events, cultural celebrations and entertainment events.
- BC Transit's pilot program, which saw a limited number of routes running later (until 2:30 a.m.), can be expanded to support a thriving night-time economy.
- Create music and cultural spaces/hubs that promote Indigenous peoples and those who identify with diverse populations.
- Better equip Victoria's musicians to submit for grants, through workshops or classes on how to incorporate, obtain business licenses and apply.
- Engagement with groups like the First Nations Council and the Intercultural Association of Greater Victoria, integrating members into music programming and events.
- Complete Victoria's strong music education foundation by adding specified music industry education (music business, management, marketing and public relations, copyright) to prepare musicians, artists and budding industry professionals for careers in music.
- Utilize the natural attractions and rich musical heritage to promote Victoria as a music city.

THREATS

- The geographical isolation of Victoria can negatively impact music tourism and music touring between Vancouver, mainland Canada, Seattle and other US cities. The cost of ferry travel is a particularly critical concern for touring artists.
- The city's strong live music scene could suffer the serious impacts of the current COVID-19 situation, with mid-to long-lasting effects on audience behaviour.

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- Without more access for young people to live music, there is no pipeline for future artists and industry professionals.
- The retention of students graduating from the University of Victoria is not strong, largely due to the expense of living in Victoria, leading students and music-students to relocate.
- The recording infrastructure that exists in Victoria is primarily home studios, which are not licensed businesses.

“Victoria is exceptionally rich in local talent. So many have launched from here to far away places, and some have also returned or stayed and greatly enrich our lives.”

Survey Respondent

3. Economic Impact Summary¹

The economic impact looks at these **features of the music economy**:

- **Direct impact:** Created directly by the activities of the music ecosystem, such as production and recording.
- **Indirect impact:** The jobs and output generated by local businesses that supply goods and services to Victoria’s music ecosystem (e.g. security for venues, internet services).
- **Induced impact:** The economic value that results from music ecosystem workers spending their wages and income in Victoria.

Music ecosystem domains included in the economic impact analysis:

- **Live Music Performance:** Based on the Canadian Culture Satellite Account, the Live Performance domain and includes “opera, dance companies and dancers, musical theatre, orchestras, music groups and artists, music festivals”² and nightclubs and venues.³
- **Sound Recording**⁴: It includes all activities related to the creation of recorded music, such as music composition, music publishing and distribution, including digital music downloads and uploads.
- **Supporting and Radio Broadcasting**⁵: Created to include activities not part of the previous two. It groups radio broadcasting, music education and public funding (music grants), together with sound recording equipment and music instruments stores.

The **geographic scope** of this assessment is limited to the Greater Victoria metropolitan area within the province of British Columbia. Additionally, to enrich the comparative analysis, the rest of the province was taken into account within the assessment as a regional unit.

Global Economic Context

- In 2019, the global recorded music market grew by 11.4% to reach \$21.5 billion, an increase of \$2.2 billion from 2018.⁶

¹ Throughout this section of the report Victoria is used as a synonym for the Greater Victoria capital region. Due to the economic impact methodology employed, an analysis on a municipal level (City of Victoria) is not possible to perform.

² (a) Canadian Conceptual Framework for Culture Statistics, 2011, P. 41. For the purposes of this research, this domain excludes the performing arts activities that are not related to the music sector.

³ This subdomain is not included in the methodology of the Culture Satellite Account of Canada; it groups venues and nightclubs whose main input is music, either recorded or live.

⁴ (b) Canadian Conceptual Framework for Culture Statistics, 2011, P. 42

⁵ This domain includes activities of “Governance, Funding and Professional Support” and Audiovisual and Interactive media’ domains defined in the methodology of the Culture Satellite Account.

⁶ Midia Research (2020)

- Music streaming totals 56% of all global revenue, while the artists' share amounts to 4.1%.⁷
- In 2018, Canada was the ninth biggest recorded music market, valued at \$572 million.

Of course, these figures are indicative of the music industry as it operates under normal conditions. The impact of COVID-19 is ongoing and thus no final calculations have been made, but the following figures provide some insight into the state of major global music markets in 2020, leading into 2021.

- By December 2020, the Canadian independent music sector had lost CAD \$233 million in revenue and 2,000 FTE (full-time equivalent jobs) due to COVID-19.⁸ Its live industry lost 79% of its revenue.
- Although no official figures have been released, a November 2020 report from the UK predicted live music industry revenues to drop 85% by the end of the year, and industry professionals to lose 65-80% of their incomes depending on how much of their total income was derived from industry activity.⁹
- The recorded music industry has remained strong despite the pandemic, thanks to an increase in paid streaming. The U.S. recorded music saw a 9.2% growth in 2020.¹⁰

British Columbia Music Economic Impact

When evaluating the economic impact of the music ecosystem in the province, it was estimated that British Columbia's music sector generated a total output (direct, indirect and induced effect) of \$4.51 billion and a total Gross Domestic Product (GDP) of \$2.37 billion in 2017. It created and supported a total of 27,680 jobs. Those employees received total compensation of \$1.31 billion. The contribution of the music ecosystem to employment in British Columbia was 1.12% of the total employment in the province. For comparison, in the provinces of Nova Scotia and Alberta, these figures reached 1.47% and 0.93%, respectively.

Table 1. British Columbia. Direct, Indirect, Induced and Total economic impact

⁷ ibid

⁸ Nordicity (2020) "The Impact of COVID-19 on Canadian Independent Music". Online at https://cimamusic.ca/uploads/ck/files/cima_impact_of_covid_on_indie_music_final_2020_12_07.pdf accessed 10-3-2021

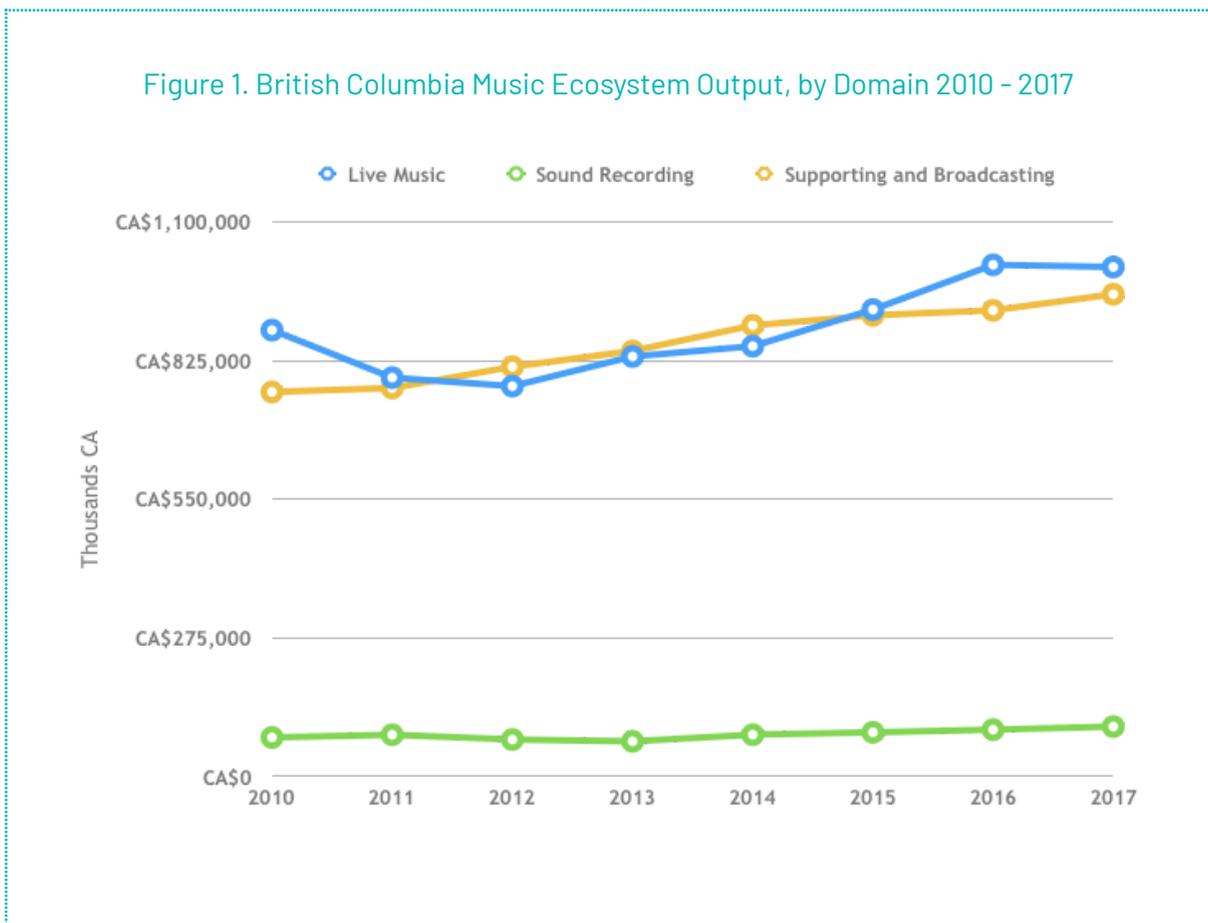
⁹ Savage, Mark (2020) "Musicians will lose two-thirds of their income in 2020". Online at <https://www.bbc.com/news/entertainment-arts-54966060> accessed 10-3-2021

¹⁰ Cooke, Chris (2021) "US record industry saw 9.2% revenue growth during COVID year". Online at <https://completemusicupdate.com/article/us-record-industry-saw-9-2-revenue-growth-during-covid-year/> accessed 10-3-2021

TYPE OF IMPACT	EMPLOYMENT (NUMBER OF JOBS)	GDP MILLION \$	OUTPUT MILLION \$	WAGES MILLION \$
Direct	13,637	1,015.63	2,067.04	635.77
Indirect	8,841	729.48	1,465.52	464.44
Induced	5,202	628.07	979.14	210.88
Total Impact	27,680	2,373.18	4,511.71	1,311.09

Source: Sound Diplomacy research, Statistics Canada 2017

According to the assessed data based on Canada’s Culture Satellite Account, the Direct Output of British Columbia’s music ecosystem grew by 19.75% between 2010 and 2017. Within the sector, the Live Music domain showed the slowest growth (14%), while the Sound Recording domain grew by 28% and the Supporting and Broadcasting domain by 25% (Figure 1.).



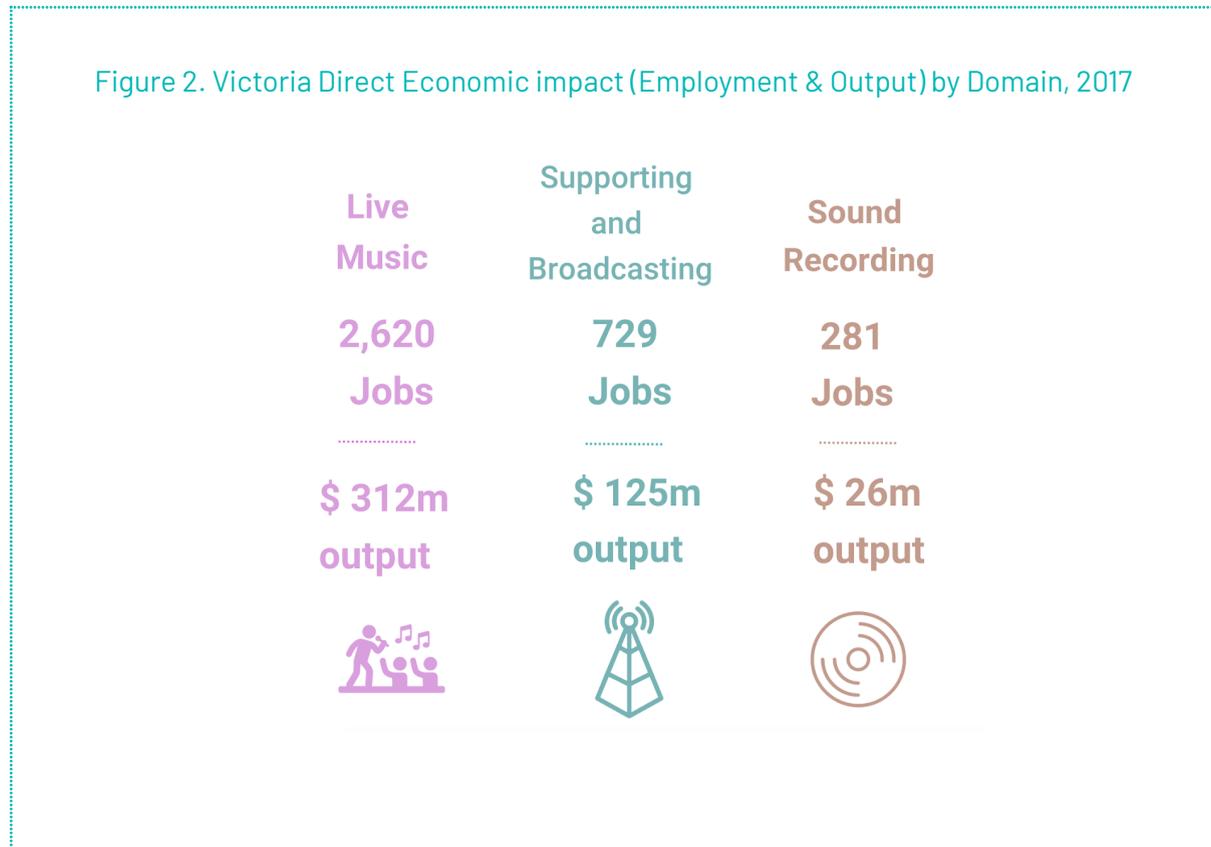
Source: Sound Diplomacy research, Statistics Canada 2017

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Victoria Music Economic Impact

In 2017 the three domains of the music ecosystem, as defined above, created 3,630 direct jobs in Victoria. They were responsible for a direct Gross Domestic Product (GDP) of \$223.61 million and a direct output of \$463.21 million.



When including the indirect and induced economic effects, the Victoria music ecosystem generated a total output of \$996.79 million and a GDP of \$521.16 million to the local economy in 2017. The total number of jobs generated and supported by the music sector in Victoria was 6,735 which accounted for 1.75% of employment in the metropolitan area.

Table 2. Victoria Direct, Indirect, Induced and Total economic impact

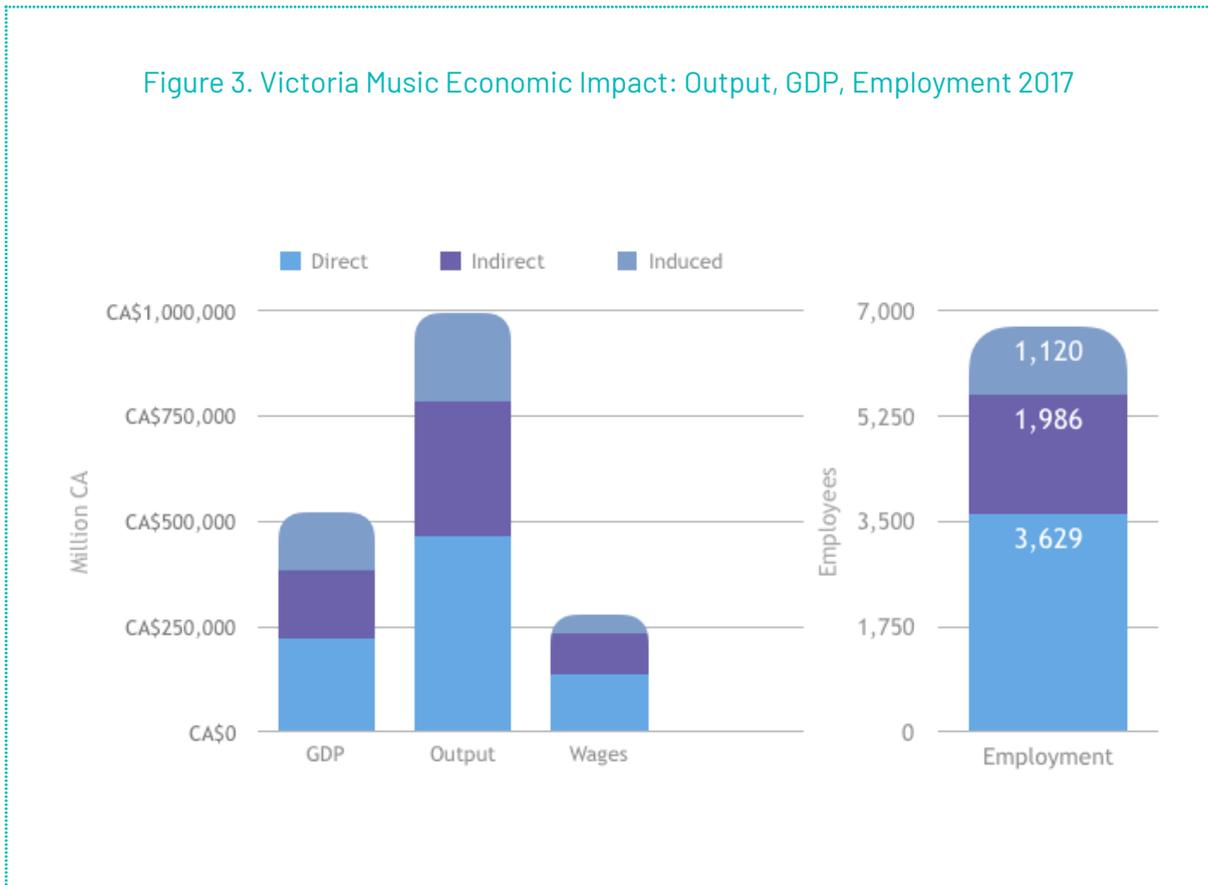
TYPE OF IMPACT	EMPLOYMENT (NUMBER OF JOBS)	GDP MILLION \$	OUTPUT MILLION \$	WAGES MILLION \$
Direct	3,629	223.61	463.21	135.65

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Indirect	1,986	160.01	322.64	98.27
Induced	1,120	137.54	210.95	45.36
Total Impact	6,735	521.16	996.79	279.28

Figure 3. Victoria Music Economic Impact: Output, GDP, Employment 2017



Source: Sound Diplomacy research, Statistics Canada 2017

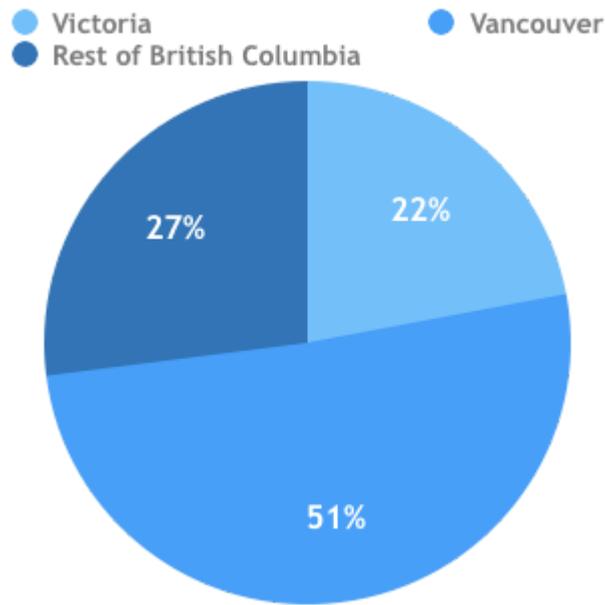
Prior to COVID-19, the majority of the economic value in Victoria’s music ecosystem was created by the Supporting and Broadcasting domain, which created 64% of the GDP of the sector. The Live Music and Sound Recording domains contributed 31% and 5% of the sector’s GDP, respectively. Post-pandemic figures have yet to be calculated.

Looking at the regional landscape, Victoria produced 22% of British Columbia’s music ecosystem GDP, while Vancouver and the rest of the province accounted for 51% and 27%, respectively.

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Figure 4. British Columbia Music Ecosystem GDP by region, 2017

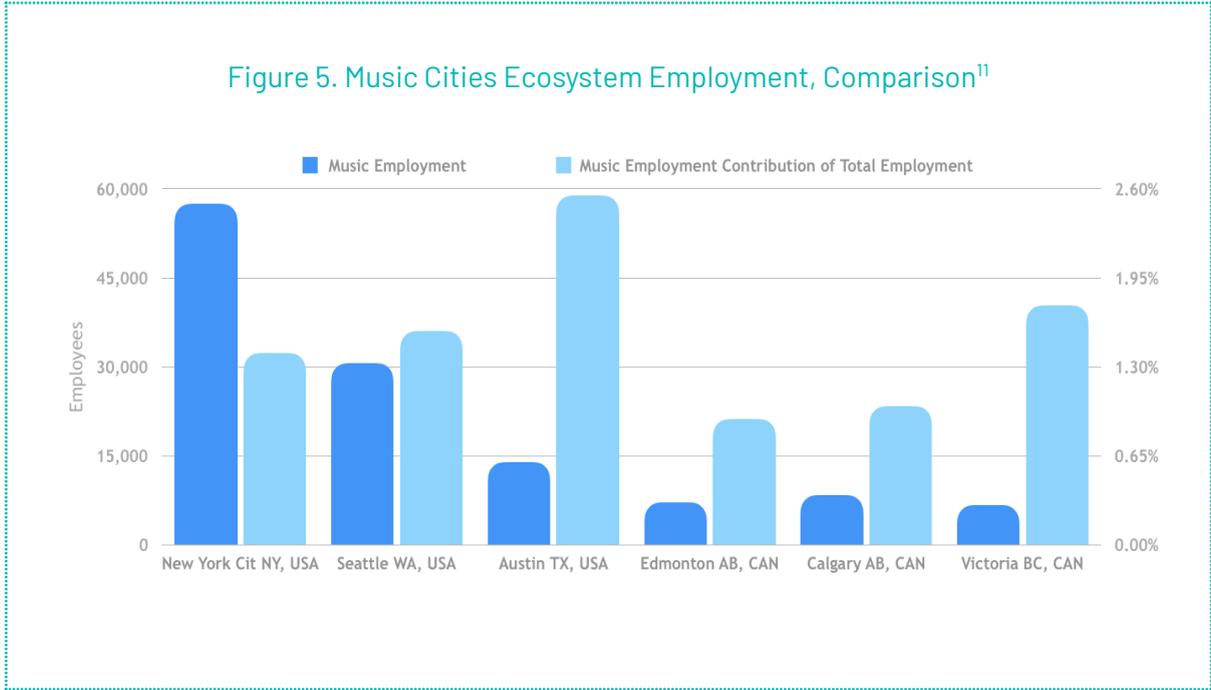


Source: Sound Diplomacy research, Statistics Canada 2017

Music Cities Comparison

Employment in the music ecosystem is one of the factors that allows for the comparison of music economies across geographies. In the case of Victoria, the music sector generated and supported 1.75% of employment in the capital region prior to changes caused by COVID-19. Compared to other, much larger, cities and metro regions in Canada, the total number of jobs is not significantly different, but the contribution ratio of Victoria's music jobs is considerably higher. We see that in Greater Edmonton and Calgary, the music ecosystem jobs barely reached 0.92% and 1.01% of the cities' total employment, respectively.

Figure 5. Music Cities Ecosystem Employment, Comparison¹¹



¹¹ Cities selected for comparison were done so to represent a range of outputs found in North America. Each city represents a different music city functionality. Some of which retain international recognition for withholding successful music ecosystems.

4. Regulatory Assessment Snapshot

Overview of Local Regulations and Policies

TOPIC	IN PLACE?	VICTORIA'S POLICY	BEST CASE
Night Transport	X	Victoria does have extended public-transit hours. However, as the night-time economy develops, a 24-hour transit service will be essential.	Philadelphia has 24-hour bus lines.
Parking	X	N/A	Austin, Seattle and Nashville all have artist loading and unloading zones.
Agent of Change	X	N/A	The UK, San Francisco and the Australian state of Victoria have forms of the Agent of Change principle.
Tax Incentives	✓	City of Victoria Permissive Tax Exemption available to non-profit arts facilities. However, outside of the Federal Tax Exemption for artists, there are no incentives directly available for artists and musicians.	The Louisiana Sound Recording Programme provides 18% tax credit for sound recording projects in the state.
Funding	✓	There are multiple grants and funding opportunities on provincial, federal and regional levels, but none aimed at marginalized or Indigenous groups.	Denver Music Advancement Fund funds projects guided by principles of diversity, equity, inclusiveness and accessibility and which provide fair pay for artists.
Event Permitting	X	N/A	Seattle, Huntsville and Chicago have instituted

			online permitting systems & seamless processes.
All-ages Permitting	X	N/A	San Diego and Seattle have permitting procedures to support all-ages concerts
Noise Laws	X	N/A	Toronto is currently reviewing its noise by-laws, the results of which can be seen as a path forward for Halifax and other municipalities.
Entertainment District	✓	External to the downtown core, there are clearly defined entertainment districts or policies.	Austin has 6, which can be utilized as a best practice for the province.
Music Tourism Policy	X	N/A	North Carolina's Come Hear NC program or Mississippi's Birthplace of Music Program are comprehensive best practices.
Music Office/Committee	✓	The Victoria Music Advisory Committee is dedicated to sector growth.	Texas Music Office's Music Friendly Communities Program is a model that can be applied in Victoria.
Fair Play Scheme	X	N/A	Musicians Union UK's Fair Play scheme could be applied to all event centres and venues.
Night-Time Economy Support	✓	Victoria currently has a Late Night Advisory Committee and the Downtown Late Night Task Force. However, a particular focus should be	London's Night Czar is one example. Pittsburgh, Fort Lauderdale, Iowa City and Amsterdam are all smaller cities that also have Night

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		placed on night-time bar and venue safety practices, as well as economic outputs.	Time Economy managers, Night Mayors and other such representatives.
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5. Music Asset Mapping

“Please make music more visible! We need the full ecosystem mapped for local talent and recognized as an essential part of our economy.”

Survey Respondent

The music ecosystem asset list and map was compiled as follows:

- Our proprietary mapping software utilized publicly available API data from Google, Songkick, and other sources to scan the overarching music ecosystem across Greater Victoria.
- This was cross-referenced through the industry survey, roundtables, one-on-one interviews and the existing Arts Victoria Culture Map,¹² to further identify spaces, places and companies across Greater Victoria. In addition, the results were verified manually to ensure that mapped assets are still in use today.
- While the mapping is intended to provide a living snapshot of Victoria’s music ecosystem, the full impact of COVID-19 is yet unknown. This mapping data will require regular updating to remain current, particularly as businesses continue to close at a faster rate due to the ongoing pandemic.

Key Takeaways

Victoria’s appreciation and passion for music is visible in the number and variety of music assets mapped. The capital region is home to a competitive number of music schools, private teachers, tertiary music education programs, choirs and orchestras. The music non-profit sector is particularly well-developed too: we mapped 27 such organizations. The music education assets per capita place the region well ahead of other Canadian metro regions, such as Vancouver (see Table 3).

Victoria has a diverse and multi-talented music community, which is visible in the high number of professional and community choirs, bands and orchestras, as well as in the variety of festivals and concert series, and spaces where music is performed. At the same time, Victoria and especially its downtown are seeing increased real-estate development activity, which poses affordability and sustainability issues for music businesses. Victoria’s dedicated live music spaces are in danger, with some having closed since the study began. Many more could experience the same fate if proper support is not put in place.

¹² Culture Map: <https://artsvictoria.ca/map>, Venue Finder Database: https://artsvictoria.ca/venue_finder

Figure 6. Overview of music assets in Greater Victoria

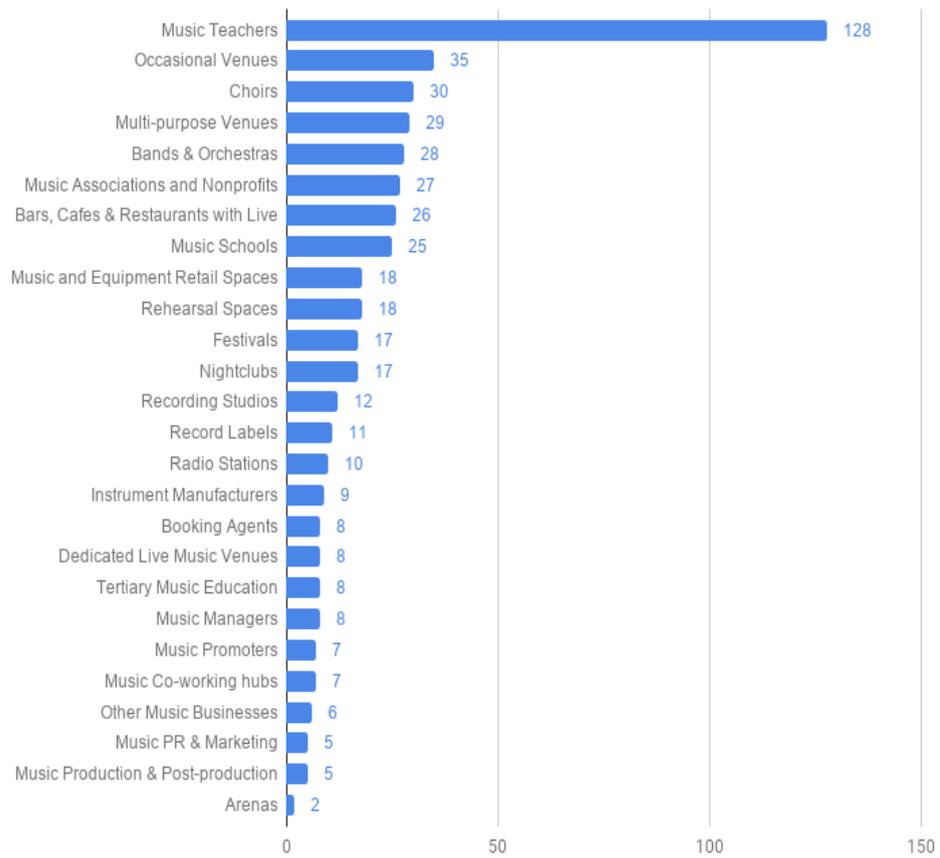
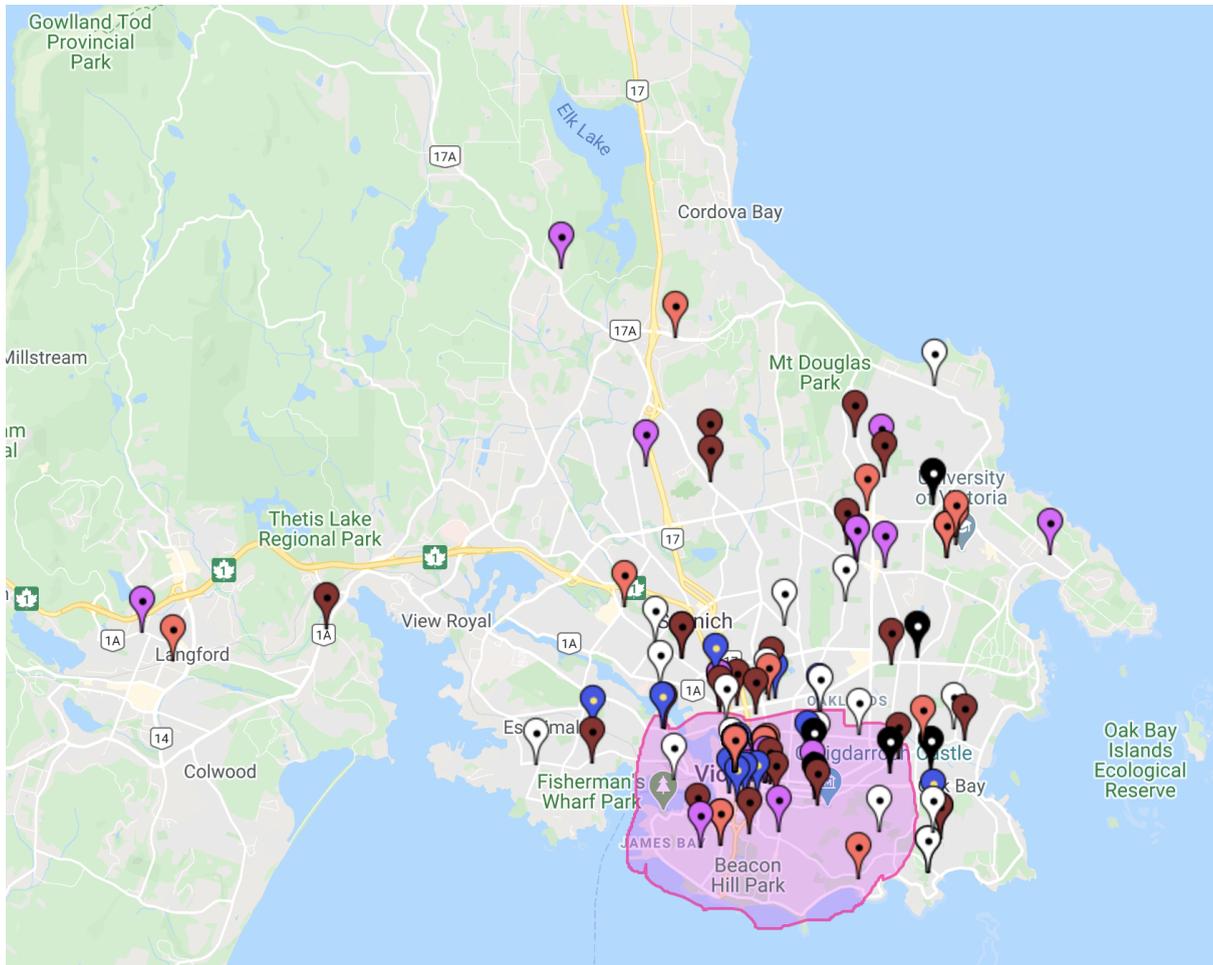


Figure 7. Map view of music assets in Greater Victoria and City of Victoria



As of June 2020, our extended mapping of Greater Victoria identified the following music assets. Please note that these figures are subject to a greater rate of change since the mapping was completed, due to the rapid impact of the ongoing COVID-19 pandemic.

MUSIC EDUCATION

- 128 Private Music Teachers
- 30 Professional & Community Choirs
- 28 Orchestras & Community Bands
- 27 Music Associations and Nonprofits

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- 25 Music Schools
- 8 Tertiary Music Education Institutions

MUSIC PLACES

- 35 Venues occasionally hosting live music (incl. parks, open air grounds and community centres), 15 of which are within the City of Victoria
- 29 Multi-purpose venues (incl. performing arts theatres, concert halls and venues for hire), 9 of which are in the city
- 26 Bars, cafés and restaurants with live music performances (ticketed and free), of which 13 are located within the City of Victoria
- 17 Nightclubs with regular music programming, 10 of which are in Victoria proper
- 8 Purpose-built music venues, 5 of which are in Victoria proper
- 2 Multi-use arenas, one of which is located in Victoria

FESTIVALS

- 17 Festivals with music programming and concert series, 11 of them taking place within the City of Victoria

RADIO

- 10 Radio stations based in Greater Victoria, one of them in Victoria proper

MUSIC INDUSTRY

- 18 Music Retail and Rental businesses (including record stores and backline rentals), 8 of which are in Victoria
- 18 Rehearsal Spaces (including studios available for rehearsal), 3 within the city
- 12 Recording Studios, 3 of which are in Victoria proper
- 11 Concert and Event producers, 5 of which are in Victoria proper
- 11 Record Labels, 3 of which are based within the city
- 9 Instrument Manufacturers
- 8 Music Managers
- 8 Booking Agents
- 7 Music Promoters
- 7 Music Hubs & Co-working spaces
- 5 Music PR & Marketing businesses
- 5 Music Production & Post-production businesses
- 6 Other music businesses (e.g. design, publishing, media, etc.)

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Using existing mapping data from other Canadian cities, we developed a per capita comparison for Greater Victoria, alongside Vancouver Metro Area, Greater Calgary and Halifax Regional Municipality. Our results show that Greater Victoria is leading across many of the mapped asset categories, and particularly so in terms of music education assets. Halifax, however, has a stronger offering in terms of music industry and live music festivals (2020’s live music shutdown excluded).

Table 3. Number of assets per capita in Greater Victoria (100,000 pc) and comparison cities/areas¹³

ASSET	ASSET PER CAPITA GV ¹⁴	Asset pC Vancouver Metro Area ¹⁵	Asset pC Halifax Regional Municipality ¹⁶	Asset pC Greater Calgary ¹⁷
Music Education Assets ¹⁸	59.5	12.8	26.3	21.5
Music Venues	32.1	6.4	19.1	15.4
Music Festivals	4.6	1.7	5	2.6
Recording Studios	3.3	2.1	6.4	1.2
Record Labels	3	0.6	3.5	0.5

¹³ Please note that the asset per capita comparison per capita is intended for internal use only. We can not publish this data officially until the respective cities have published their reports. Unless stated otherwise, data source has been Sound Diplomacy’s own mapping research and data scraping tool.

¹⁴ Unless stated otherwise, data source has been Sound Diplomacy’s own mapping research and data scraping tool.

¹⁵ Population: 2,463,431

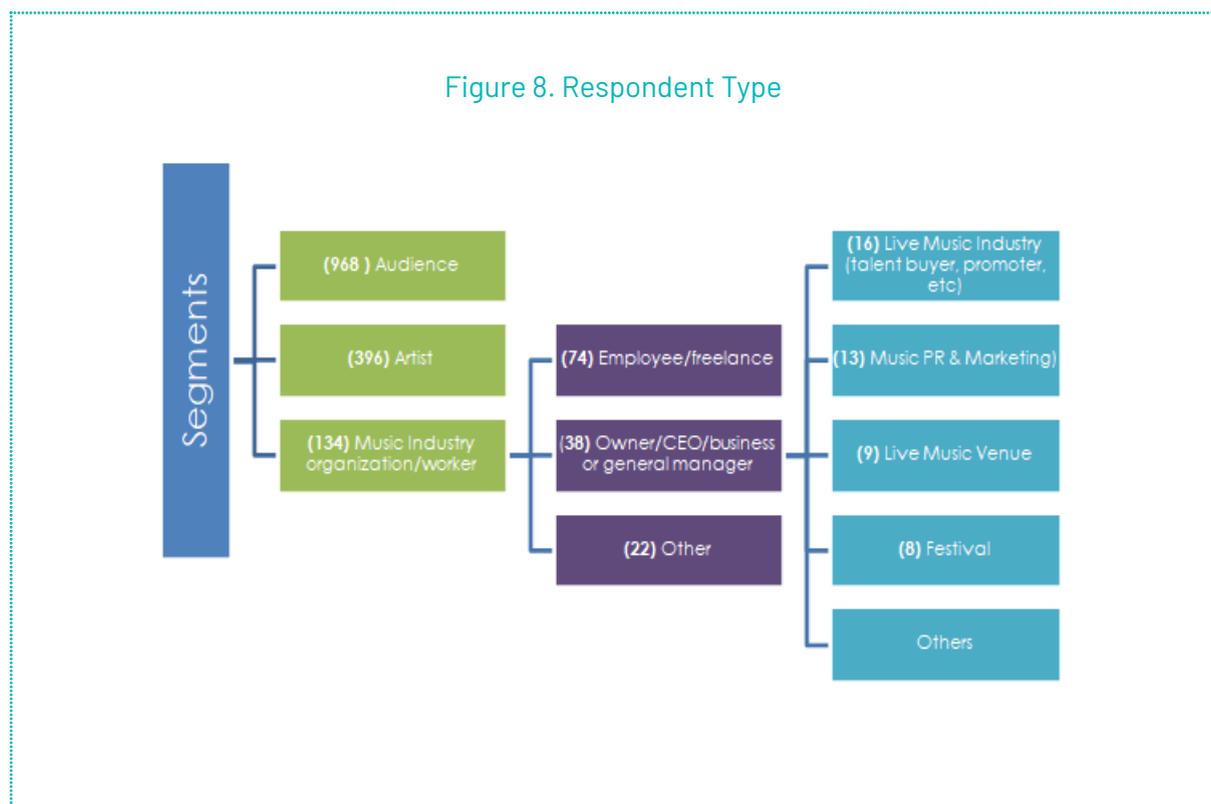
¹⁶ Population: 403,131

¹⁷ Population: 1,392,609

¹⁸ The sum of all music teachers, schools, conservatory, college and university programs with music, including music business programs, choirs and orchestras.

6. Survey Highlights

An online survey ran from March through April 2020. There were 530 industry respondents (396 musicians and 134 organizations and music business professionals) and 968 music fan respondents. The survey covered topics such as music ecosystem strengths and challenges, artist and industry development gaps and music audience habits. Below is a selection of key findings for each survey respondent type. A comprehensive survey report is included in the Appendices. Please note that, at the time of this survey, respondents were not aware of the full length and impact of the COVID-19 pandemic.



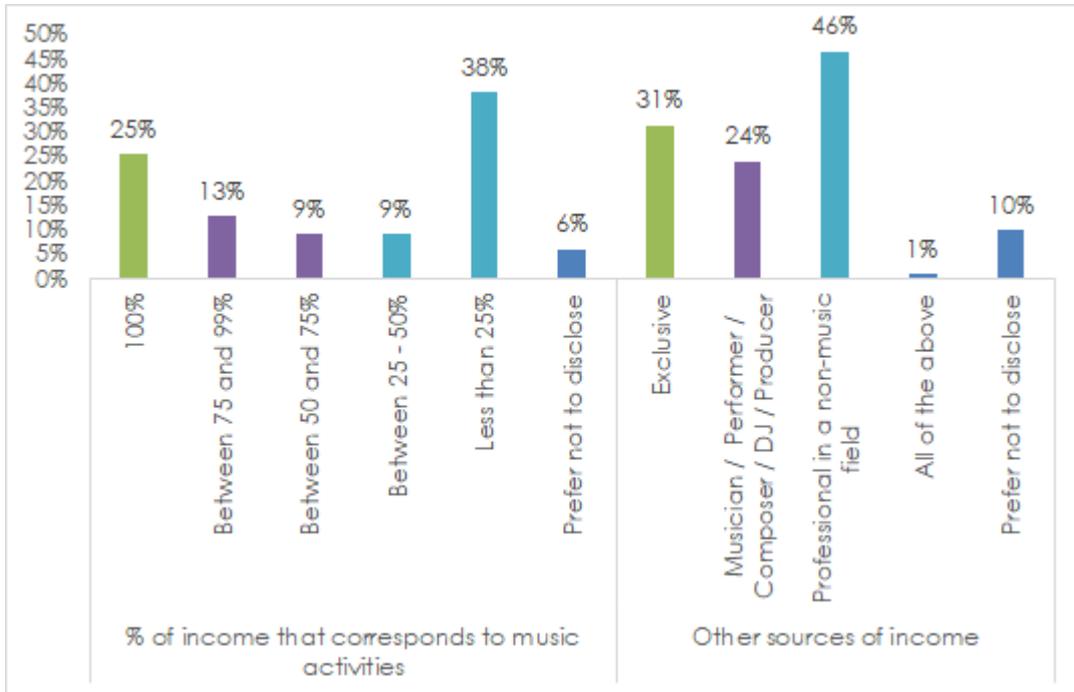
Organizations/Workers in Victoria's music industry

Victoria has a semi-professional music industry: Music Industry workers/organizations in Victoria (based on respondents) are not fully professionalized, with over one third (38%) of the people surveyed stating that less than 25% of their income is derived from music activities. Workers and organizations still have a high dependency on other economic activities besides music where the most common additional source of income is performing professional activities in a non-music field (46% of people selected this option).

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Figure 9. Workers/organizations' percentage of income from music activities and other sources of income, Victoria's music ecosystem



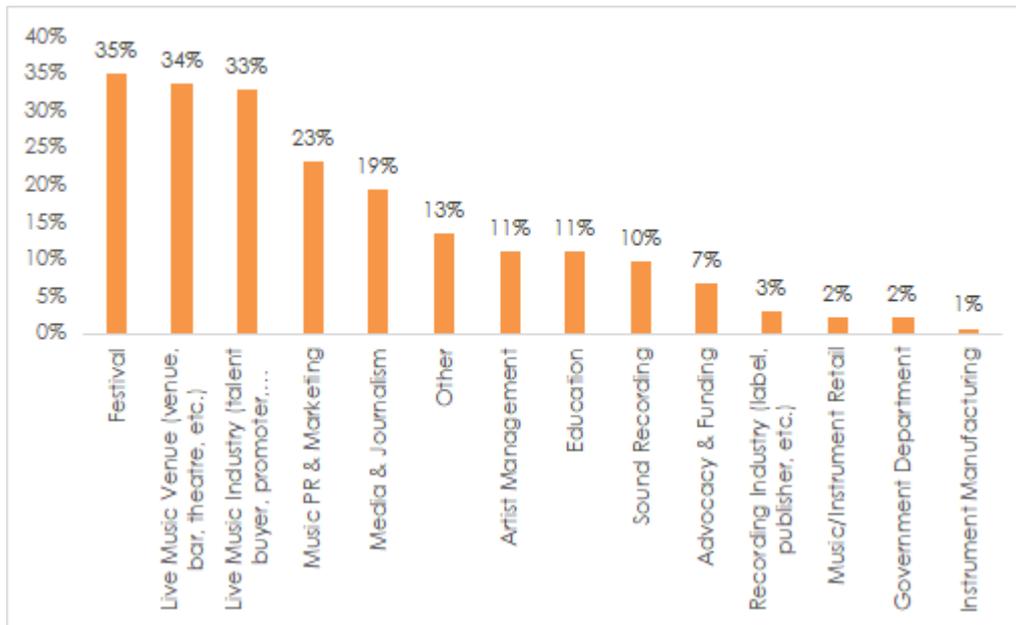
Live music is at its core: These workers and organizations, when working for the music ecosystem, mainly are related to live music activities: perform activities within a festival (33%),

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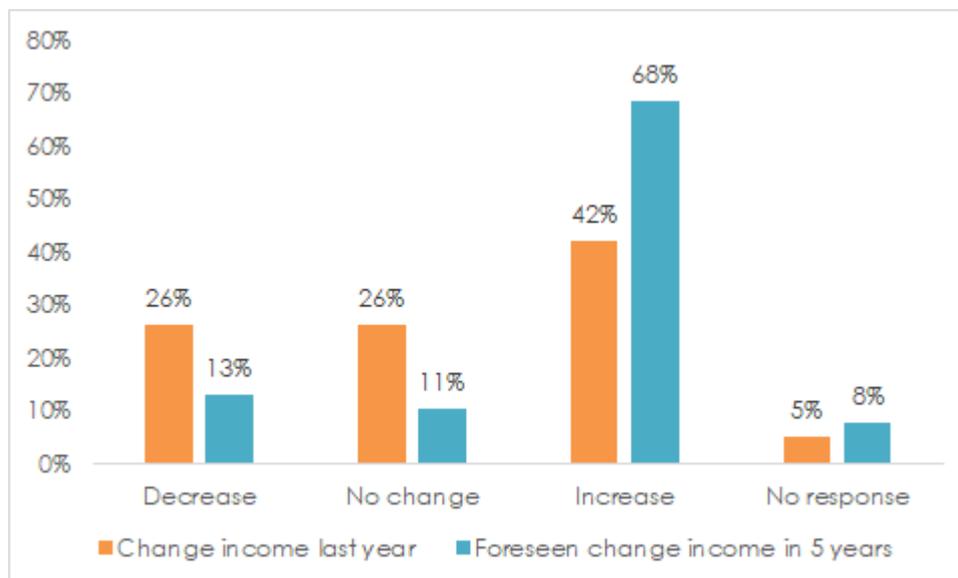
a live music venue (34%) and live music industry activities such as being talent buyers or promoters (33%).

Figure 10. Type of activities performed by workers/organizations in Victoria's music ecosystem



There is a positive financial outcome: Music Industry organizations have perceived a positive change in income in the last year (increase of revenue) and are also positive towards their future income in the next 5 years.

Figure 11. Change in income in the past year and expected income in the next 5 years



To ensure this happens, participants recognize the need to improve their marketing and PR skills and grant writing.

Figure 12. Main Skills that Employers/Freelancers are Interested in Improving

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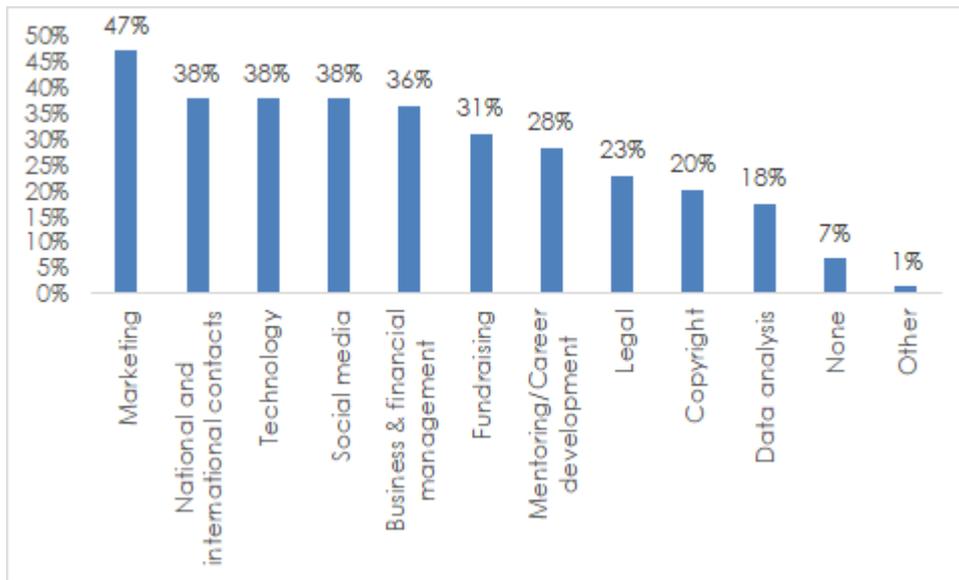
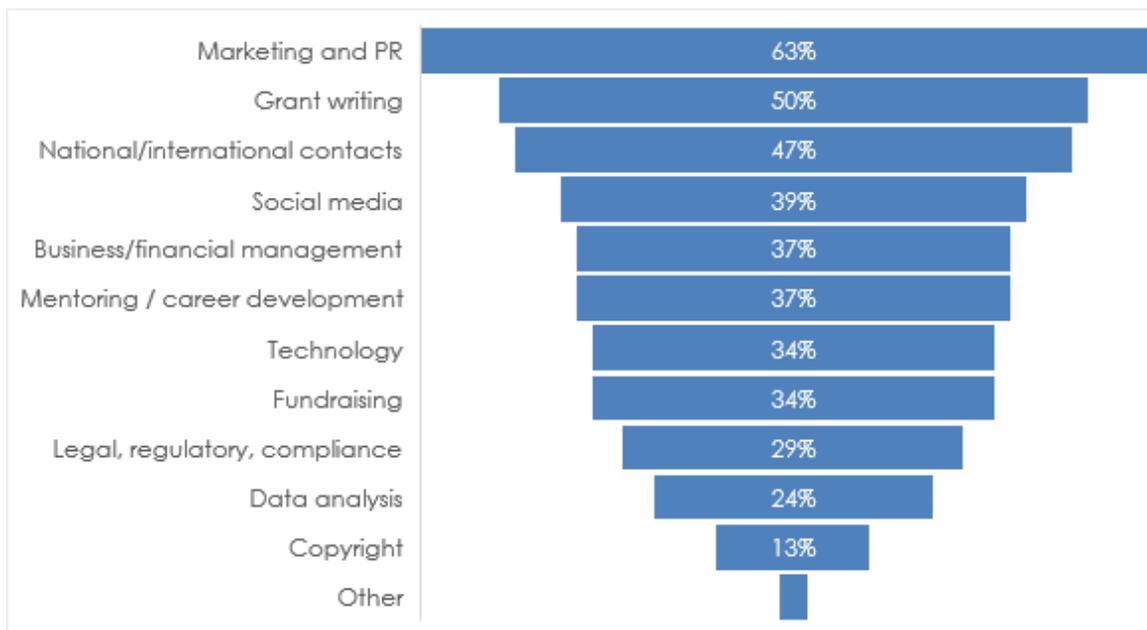
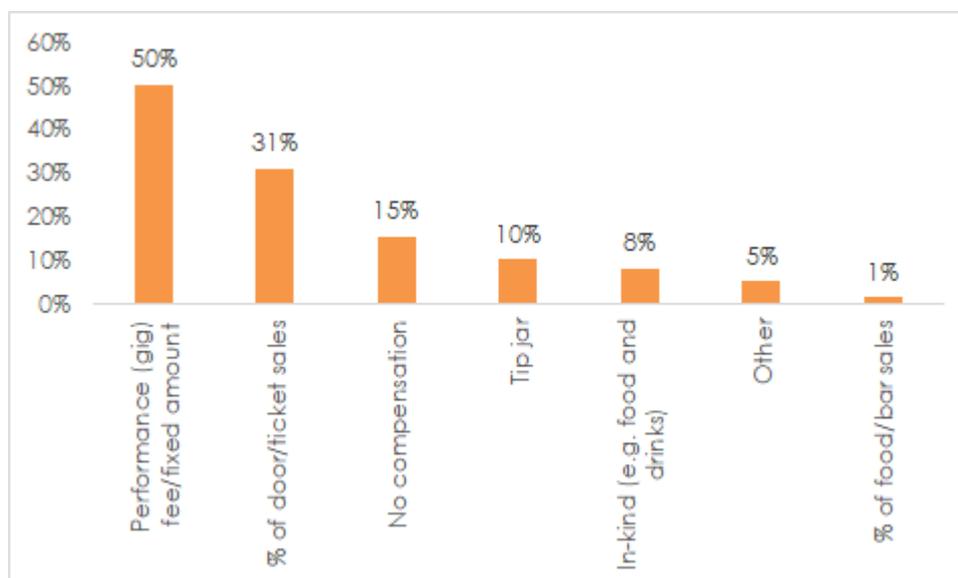


Figure 13. Main Skills that Owners/CEOs/Managers are Interested in Improving for their Organization



Local music is the focus: Local artists make up the main entertainment offering by local music venues and the main compensation is through a fixed fee per show.

Figure 48. Main means of compensation for shows in Victoria in the past 12 months



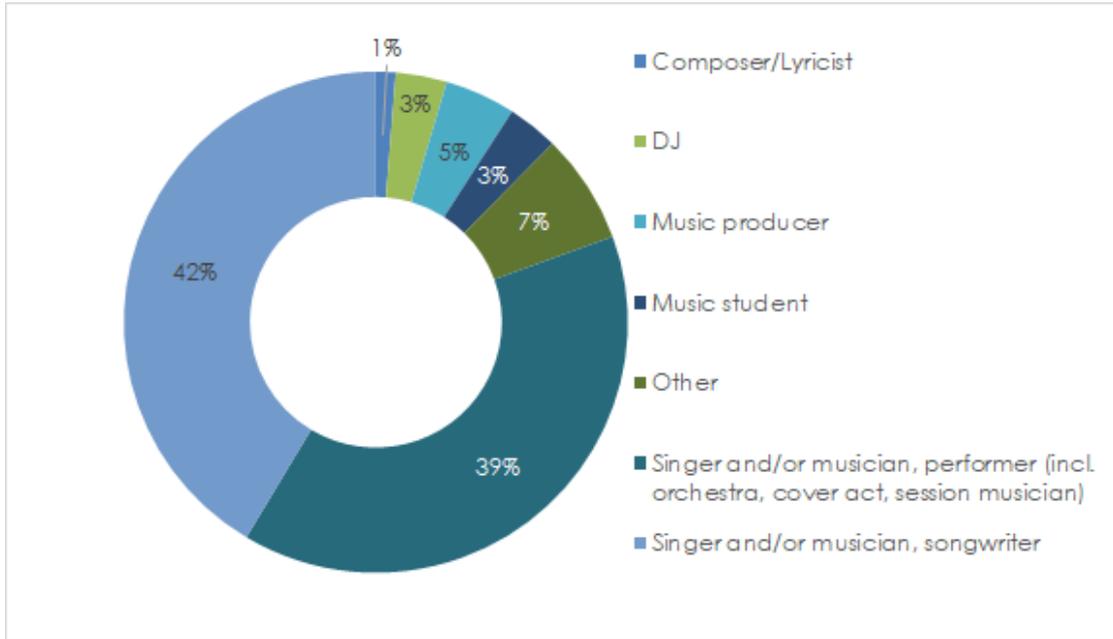
Artists/Musicians

Singers and musicians are main creative generators: artists in Victoria are mainly classified as singer and/or musician songwriter (41%) and Singer and/or musician, performer (39%).

Figure 15. Performer/Musician Type

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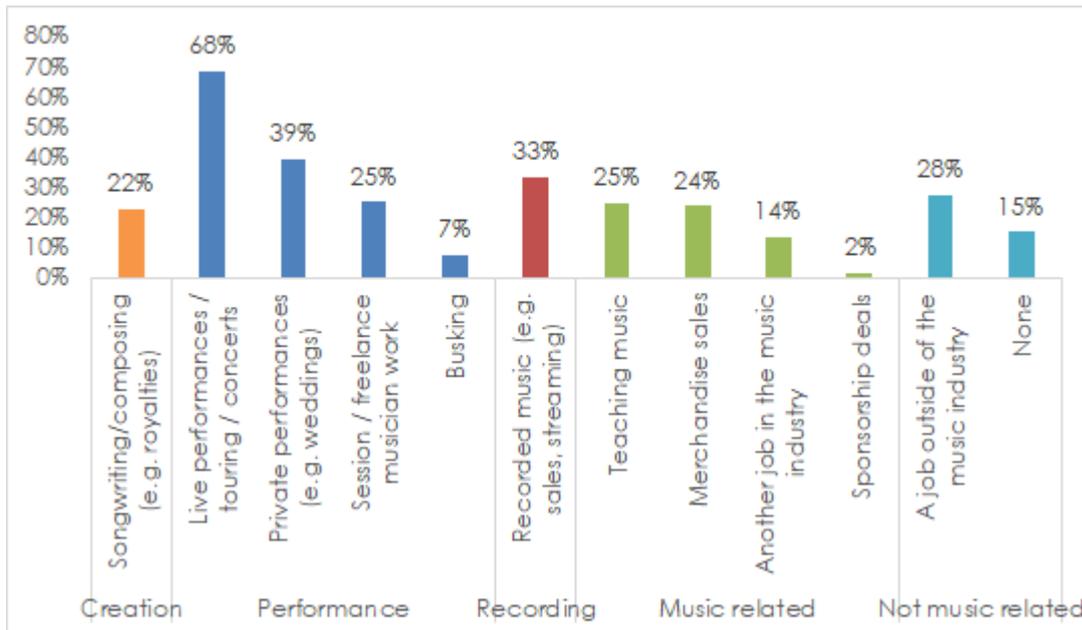


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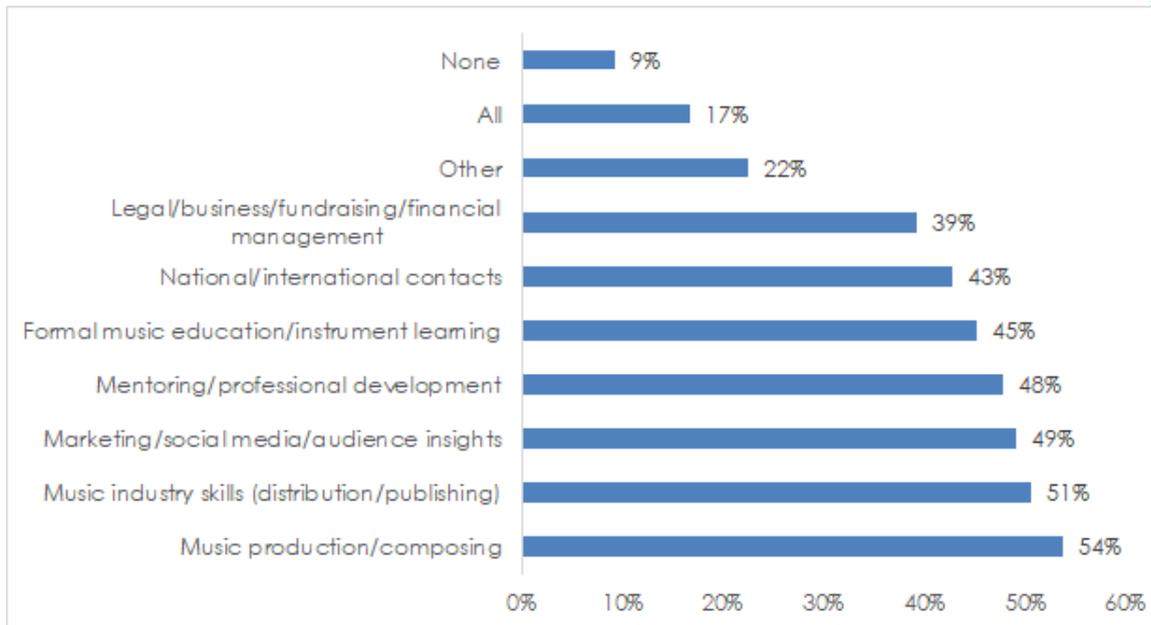
Victoria has a semi-professional creative music sector: Most of the artists define themselves as semi-professional artists (49%) since most of them are paid from music but it is not their main source of income. In addition most of them don't have support from other stakeholders in the music industry such as booking agents, a record label or a manager.

Figure 16. Sources of income for artists in Victoria in the past 12 months



In this sense, they are interested in improving a wide set of skills related to several areas in the music sector.

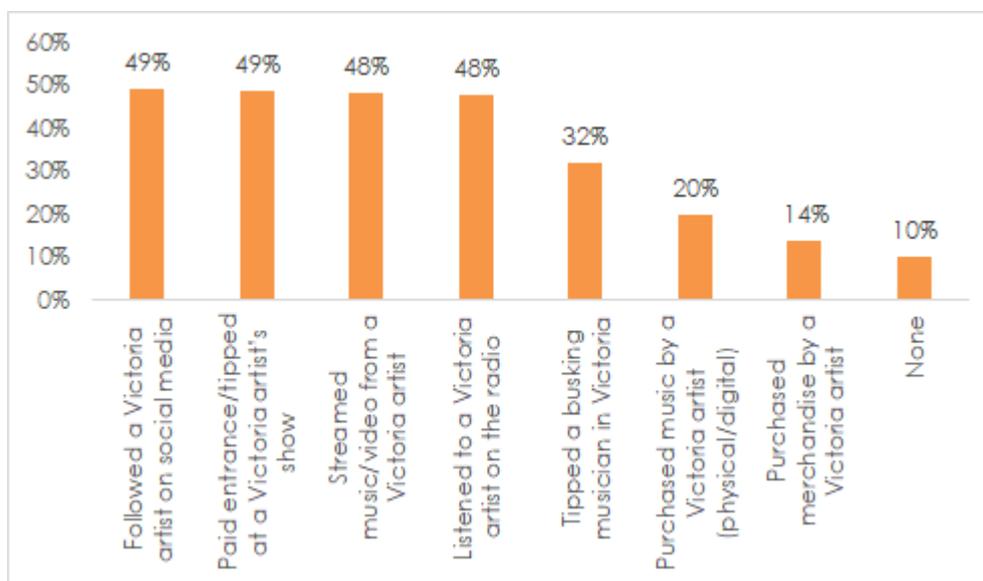
Figure 17. Main Skills that Performers/Musicians are Interested in Improving



Music fans/audiences

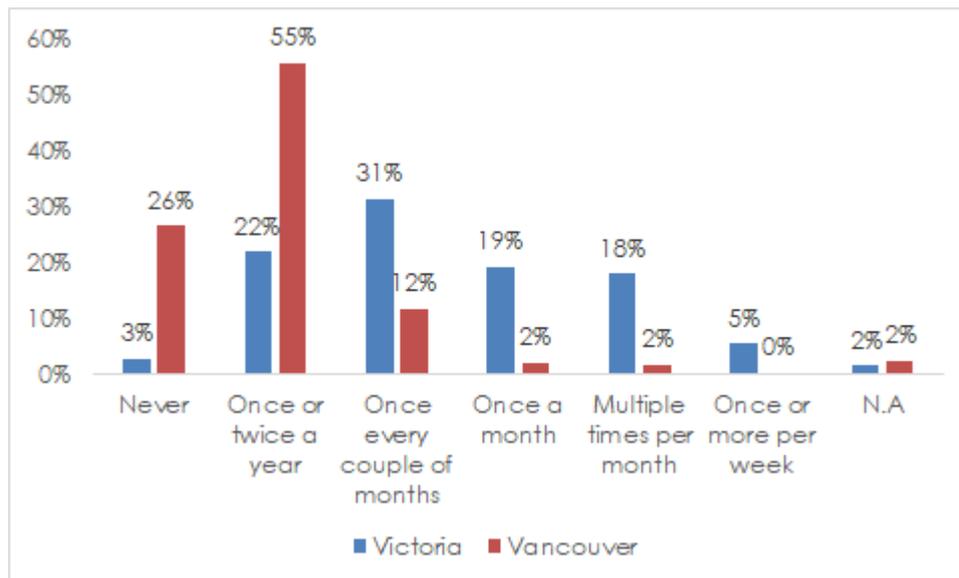
An existing audience advocates for local talent: Victoria's music audience is an active follower of local music. They express this by actively following local artists in social media (49%), paying entrances to local artists' shows (49%), streaming their music or videos (48%) and listening to them on the radio (48%).

Figure 18. Activities done by the audience which involve local Victoria artists, in the past 6 months



There is opportunity to increase attendance frequency: Even though audiences attend to local artists' performances, they don't do it in a high frequency (mainly once every couple of months), hence there is an opportunity to lure them to increase their attendance. Ensuring that artists are more engaged with the local community might be an alternative to make local music more visible to this audience (besides using traditional promotion channels).

Figure 19. Frequency in which the audience attends a show in Victoria and Vancouver



Overall remarks

The promotion channels are aligned: The main means of promotion used by artists and music industry workers/organizations correspond to the same means mainly used by the audience to find about Victoria music events. These means are both traditional and digital. Facebook is the most popular, followed by word of mouth, Instagram and physical signage.

Figure 20. Means used by workers/organizations in Victoria to promote music or their own organization

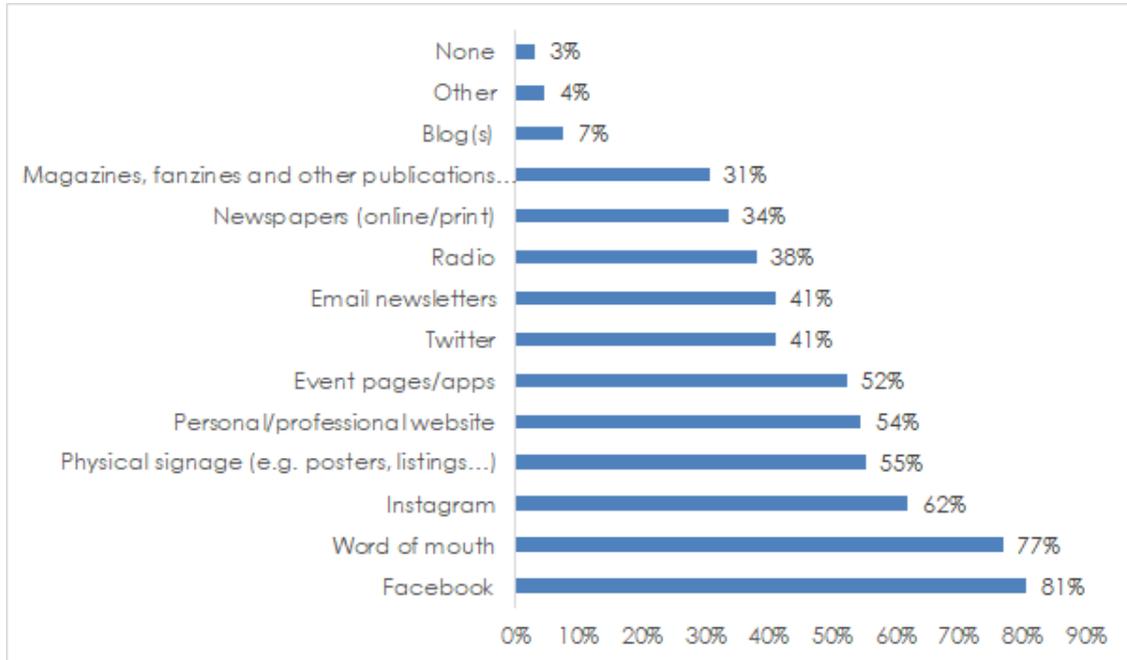


Figure 21. Means used by musicians/artists in Victoria to promote their music

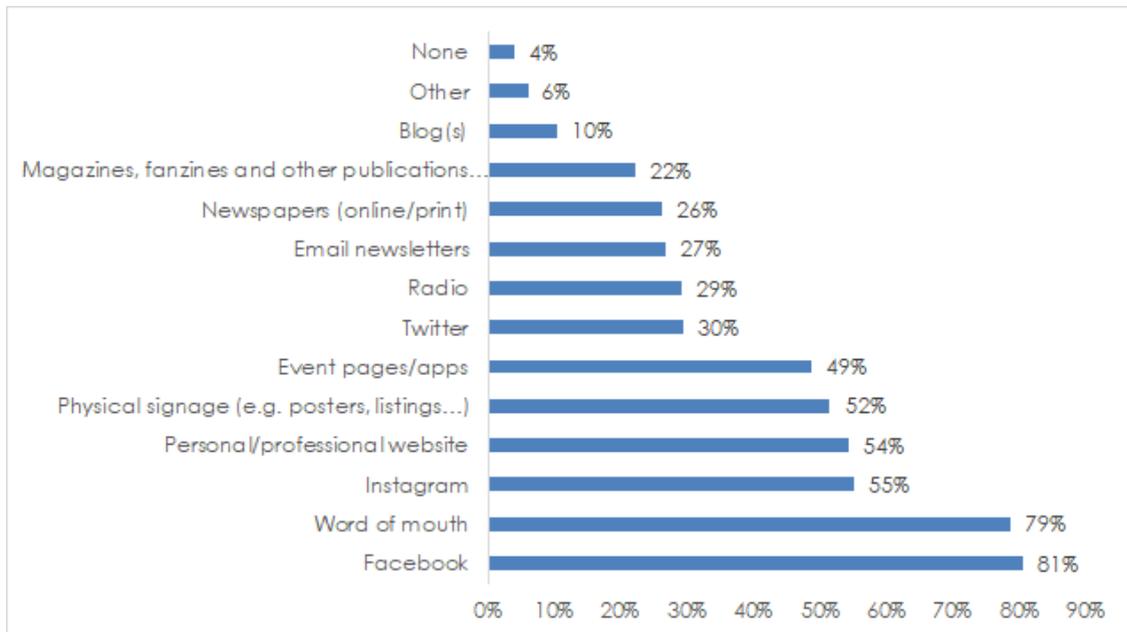
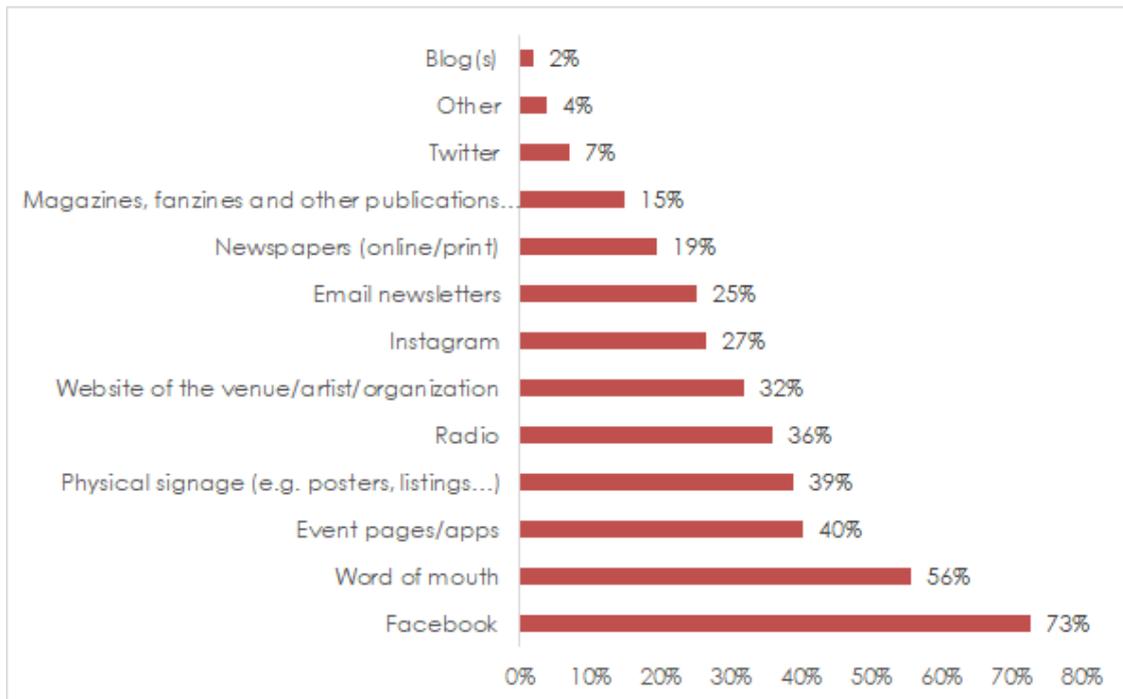


Figure 22. Main channels where the audience finds about music news and activities in Victoria



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The music demand matches the supply: Victoria’s music offering is very diverse, where rock/punk/metal is one of the most popular, as well as funk, soul and R&B, classical and Folk and singer-songwriter. These genres are the preferred ones by the audience, which matches the current programming/offering from artists and music venues.

Figure 23. Main music genres often performed in the venues

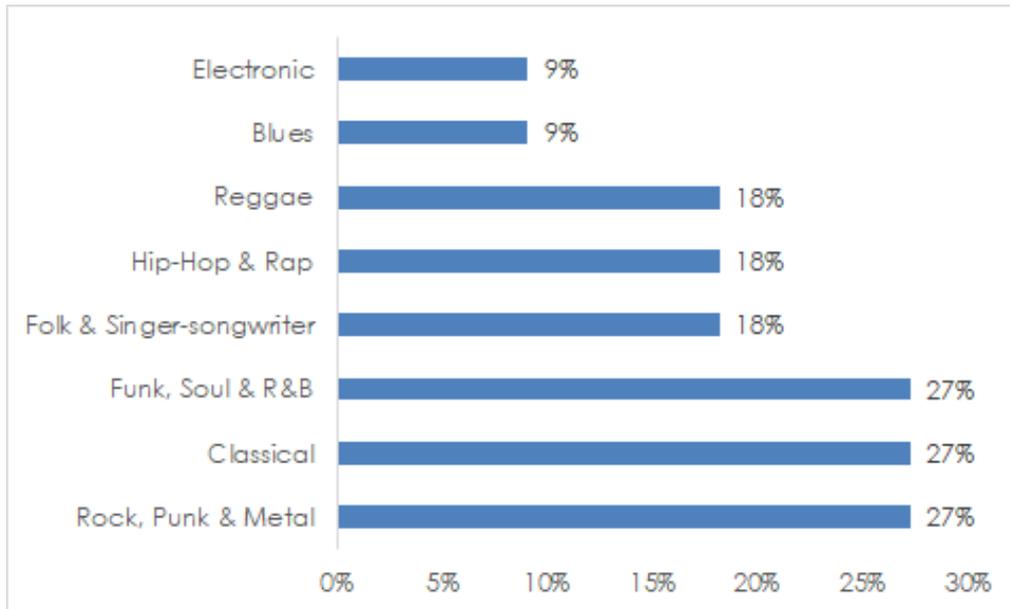


Figure 24. Main music genres (artists)

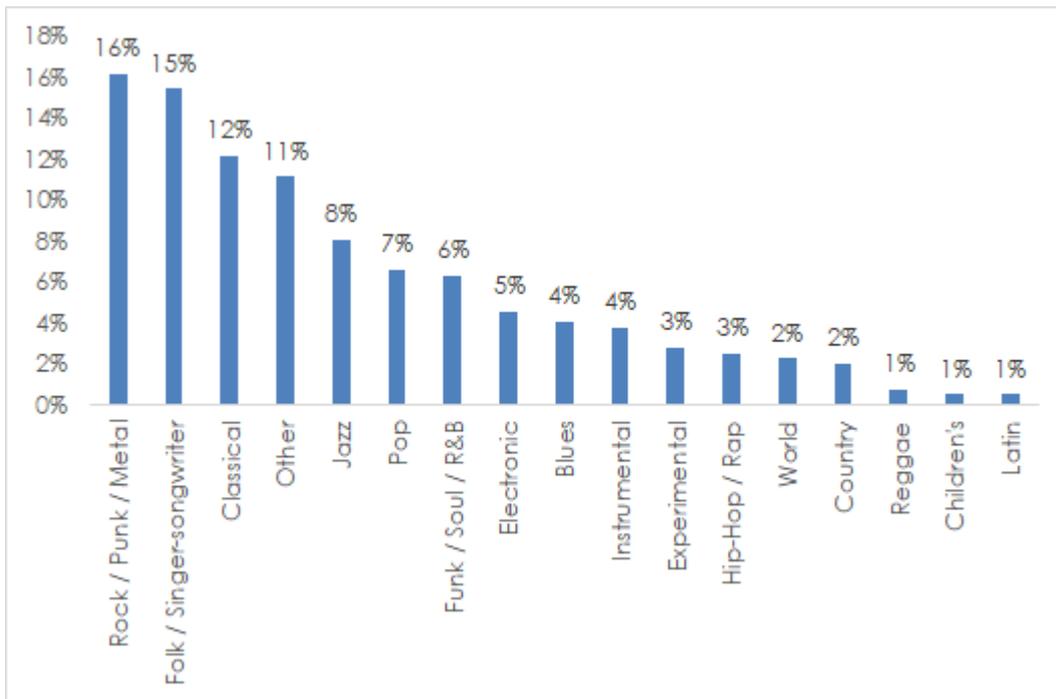
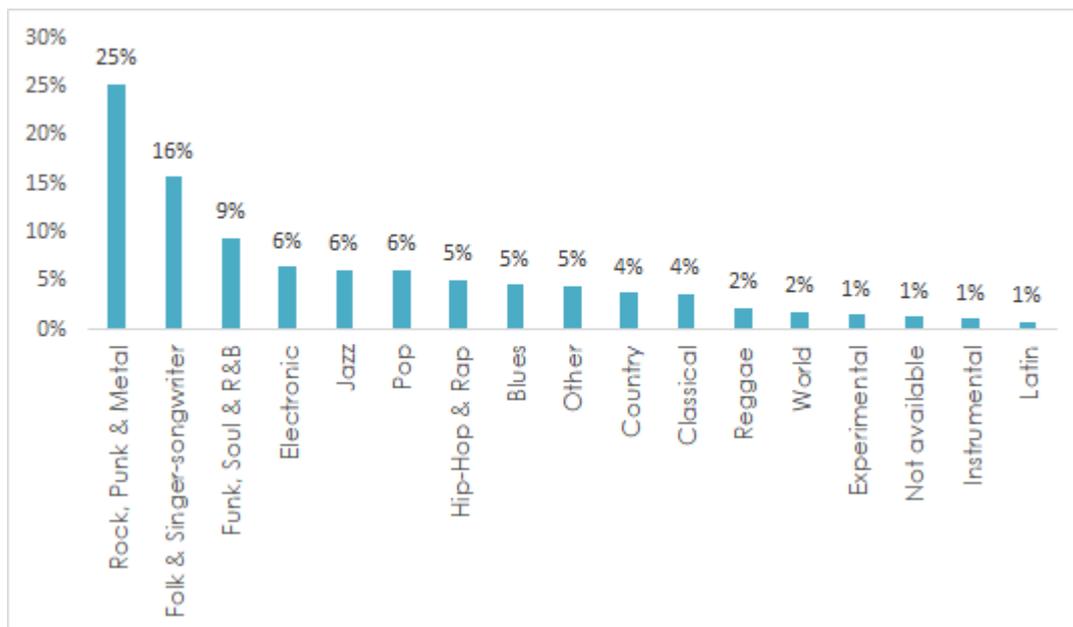
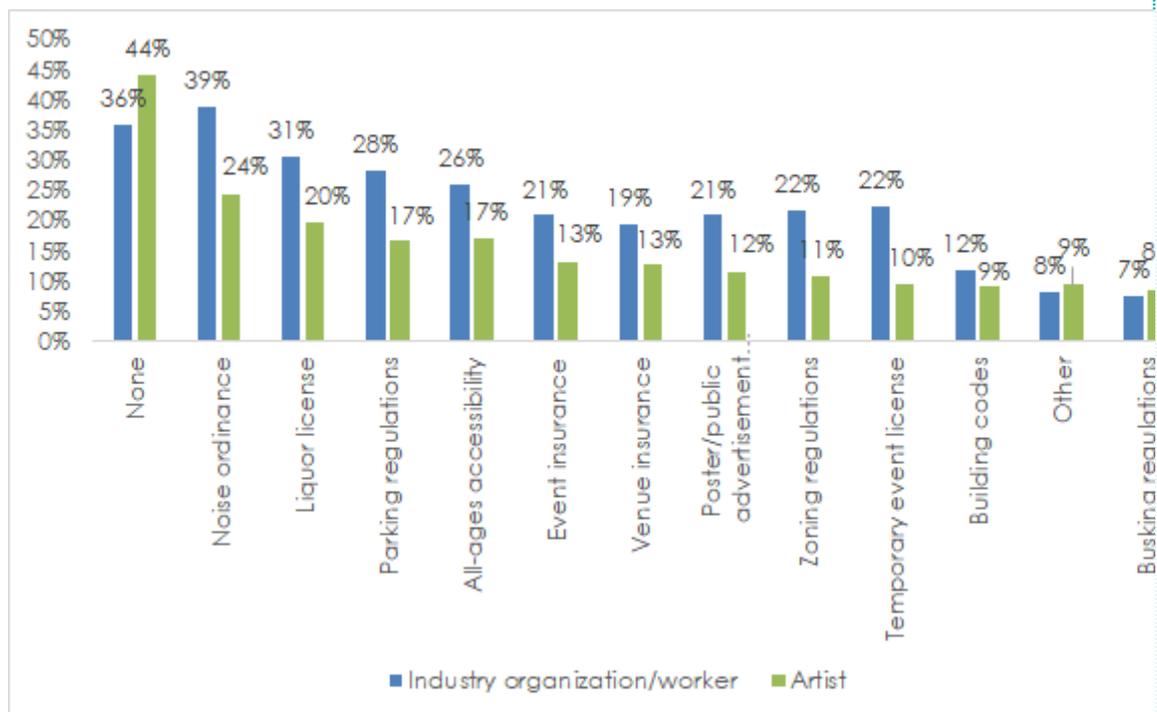


Figure 25. Favourite music genres of the music audience in Victoria



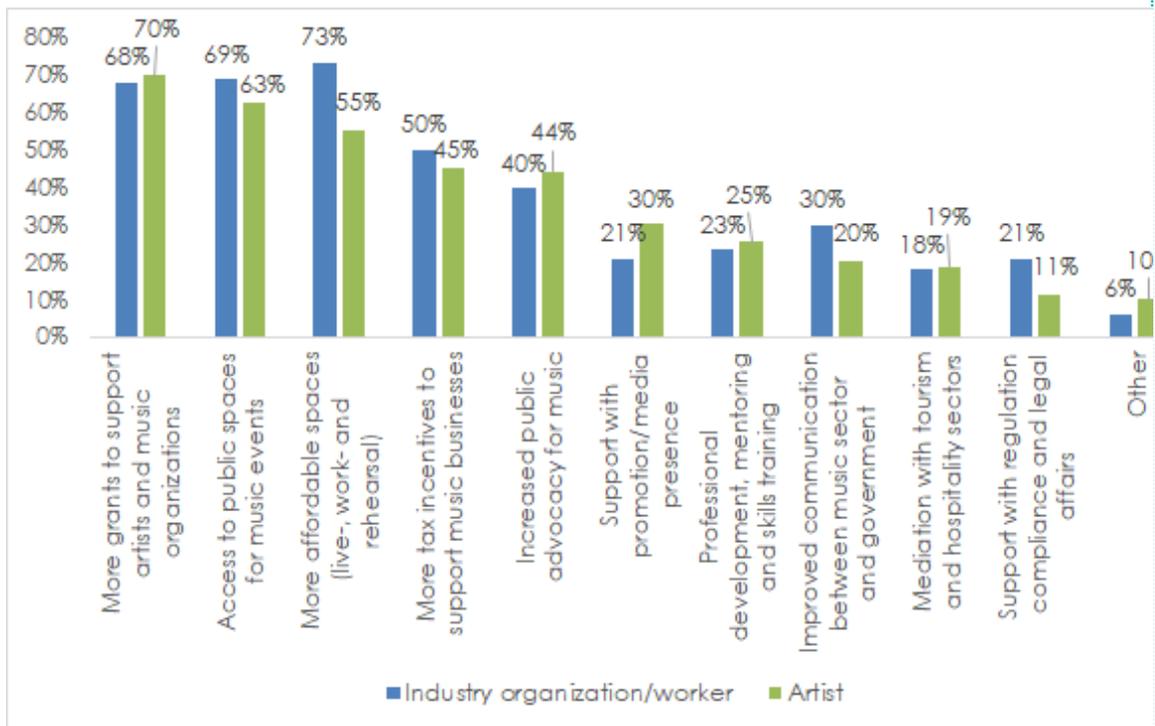
Policy and regulations generate the most negative impact: Noise ordinance, liquor licenses and all-ages accessibility are the main three policies or regulations that have generated the most negative impact for artists and music industry workers/organizations.

Figure 26. Impact for artists and workers in the music industry, by regulations and policies



Need for funding or grants: Stakeholders communicated most artists and music industry workers/organizations have never received a grant or tax rebate. They mainly haven't done so because they don't know what is available for them. This is an opportunity for governments to educate or better communicate to these segments on their options.

Figure 27. Music Industry workers/organizations and artists prioritization on policies



The music ecosystem advocates for diversity: In our findings, both artists and music industry workers expressed being advocates for ensuring diversity in genres and backgrounds. They also expressed they expect the government and leadership groups to incorporate this value in the actions they take towards the music ecosystem.

Figure 28. Level of importance that artists and Music Industry workers/organizations give to some aspects in Victoria’s music ecosystem (1 = ‘not at all important’ and 5 = ‘very important’)

HOW IMPORTANT IS IT TO YOU...	INDUSTRY ORGANIZATION / WORKER	ARTIST	OVERALL	PRIORITY
That Victoria City government and others in power publicly champion all genres of local music	4.47	4.55	Very important	1
That support for music in Victoria by the government and others in power is equitable for all music genres and backgrounds (e.g. ethnicity, gender, LGBTQIA+, age, experience, abilities)	4.27	4.29	Important	2
That music leadership and advocacy groups in Victoria are inclusive and diverse (e.g. ethnicity, gender, LGBTQIA+, age, experience, abilities)	4.22	4.22	Important	3
To access more music-related education and professional opportunities in Victoria on Industry development (e.g. trends, marketing, export, networking)	3.85	3.72	Important	4
To access more music-related education and professional opportunities in Victoria on Creative development (e.g. instrument learning, jamming, producing)	3.58	3.70	Important	5

The music ecosystem is rated by the audience with an average score: even though audiences were neutral towards the performance of some aspects of the ecosystem, there are opportunities to improve not only through government efforts but through the artists and music industry workers/organizations themselves.

Figure 29. Audience Ratings of Victoria's Music Ecosystem
(1 = 'very poor' and 5 = 'very good')

HOW WOULD YOU RATE THE FOLLOWING PARTS OF VICTORIA'S MUSIC ECOSYSTEM?	PEST FACTOR (Political, Economic, Social, Technological)	AVERAGE RATING
Lower ratings (below 3.0) ¹⁹		
Parking capacity around venues/festivals	E	2.81
Presence of music by Victoria artists in non-music events (sports, community, etc.)	S	2.85
Neutral ratings (between 3.0 and 3.4)		
Availability of music education in schools	P	3.09
Music opportunities for young people	E	3.13
Opportunities for night/late night dining	E	3.17
Visibility of Victoria music talent	S	3.24
Reputation of Victoria as a music place	S	3.38
Higher ratings (above 3.5)		
Physical accessibility of venues/festivals	T	3.50
Diversity and inclusiveness in the music community	S	3.53
Sound quality of music venues/festivals	T	3.62
Safety around venues/festivals	P	3.82
Safety in venues/festivals	T	3.99

¹⁹ Both lower ratings tend to neutral opinions but are the two lowest scores and are below 3.0 'Neutral'.

7. Strategic Actions

This section outlines the steps Victoria should take across eight action areas, with additional sub-sections highlighting crisis relief measures that can be taken within those areas. These action areas and findings also elaborate on how to address the weaknesses identified in the regulatory assessment. Where applicable, there has been direct mention of COVID-19 measures in certain action areas. These are provided to offer insights on how some regions around the world are working to relieve the hardships for music sector actors, induced by the COVID-19 outbreak.

1. Crisis Relief Measures
2. Governance and leadership
3. Diversity and equity
4. Music education
5. Audience development
6. Artist and music industry development
7. Spaces and places
8. Tourism and music city branding

Within these eight areas, we have provided 22 opportunities and 16 best practice case studies. In addition, there are a total of nine crisis relief measures found within six of the eight action areas to assist with COVID-19 recovery. These measures were included where applicable and are offered as a point of reference. Each action area represents a key function within a music city and should be harnessed in conjunction with one another.

A thriving music ecosystem should be viewed from a holistic perspective and should be approached with strategic planning and, most importantly, implementation. The provided recommendations were derived from an in-depth analysis of the local music sector and were informed by roundtable discussions, survey responses, visit reports and a review of the local literature. In addition, benchmarking Victoria's music sector against other music cities around the world helped identify the foundational gaps that exist. Doing so ensures that Victoria is taking progressive and forward-thinking steps to create a robust and highly-regarded international reputation as a music place. Benchmarking also offers insights into the necessary actions needed to create and implement each individual recommendation.

Crisis Relief Measures

Since the emergence of COVID-19, the global music and arts community has been forced to recognize the importance of crisis relief measures, the value of community, and the desire to persevere and maintain resilience. The creative industries in our cities are as important as ever, and as such, they must be able to rely on their government and local communities for support. Despite the uncertainty surrounding the current virus pandemic, Victoria has a unique opportunity to take on a leadership role in Canada regarding relief programs and its resource offer. It is imperative that support systems and initiatives are not looked at solely through the lens of financial compensation, but rather through a holistic approach, accounting for career management, networking, mental health and communication outreach. Financial relief efforts are necessary and must be explored, but given the vast diversities within a music ecosystem, there will need to be a range of accessible resources suited to the needs of each different subsector, whether as an emerging artist, well-established arts organization, engineer, technician or venue owner.

To effectively aid in the recovery of those in need, collaboration and cohesiveness is an absolute must, ensuring Victoria's music ecosystem can not only exist, but thrive in the most trying times. It is important that the initiatives and programs set in place are done so with patience, in a timely, yet strategic manner, and with the consensus of the music ecosystem. These measures are meant to have longevity, accounting for future actions as much as current-day action items. Community involvement, whether through virtual discussion or public survey response will yield positive and accurate insight into which gaps and strengths exist in regards to crisis relief.

Artists within British Columbia are already able to access a range of music relief support both financially and personally, which demonstrates a strong relationship between local governments and the great music community. To further support Victoria in its crisis relief efforts, there are eight case studies provided throughout the action areas below. These should serve as a guide, indicating what could be done and what has been done in other music cities. We have also created amendments to each action item specifying how the economic shutdown affects the ability to execute the item immediately. In all cases, preparatory steps can at least be put in place to ensure everything is ready to launch as global economies begin to recover and tourism and live entertainment open up.

7.1 GOVERNANCE AND LEADERSHIP

For a music city to develop sustainably, systems and strategies need to be working in their favour. Most importantly, these systems and strategies need to be organized cohesively. Governments and decision-makers must be vested in their cities' creative well-being. Music has the potential to drive an economy, but it must have the tools and ability to do so.

Action 1: Create A Music Office

When to implement: 12-24 Months

COVID-19 timeline impact: Can be done during recovery

Through the support of the Victoria Music Advisory Committee, a music office will become the first point of contact for the music sector. The music office must directly correlate to City departments. Those positioned in the music office will take on roles that include, but are not limited to: music ecosystem advocacy; public and private sector liaison; local/international music network development; advising the City department and pursuing new funds and grants that support the development of industry workers, performers and owners. This position must work very closely with the City's already existing Music Advisory Committee, which will act as the voice of the ecosystem.

At the minimum, an already existing city official could be assigned as the music executive. This person would serve as the primary liaison between music advisors, communities and local decision-makers. Cross-sector representation in the Music Office and Music Advisory Committee is essential. Examples could include economic development agents, established music producers and music council members. To support the music office, working groups should be established and assigned to different topics of action.

Indigenous Considerations

It is essential that the Victoria Music Advisory committee, along with the Music Office, remains diverse to ensure equality across music ecosystem policies and activities. Indigenous artists and music professionals face unique challenges when pursuing their careers and accessing resources and opportunities within local infrastructure. It is vital that their community is represented within the Music Office to facilitate communication between city officials and Indigenous musicians and music industry professionals. This can help address needs expressed in roundtable discussions, such as more accessible permitting, increased performance opportunities, and equitable promotion.

Why Is It Important?

Creating a Music Office will bridge the gap between the public and private sectors, alongside the government and music communities. As such, the needs of the local music community can be directly identified and addressed through a streamlined process. The positioning of a Music Officer will ensure that music has accurate representation within city planning and local

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developments, which then allows for music to be further ingrained into the civic lives of Victorians.

Music city success requires government action. Those who participated in the roundtable discussions and interviews identified government actions as the most important aspect of creating a successful music community. In the survey, respondents were asked to rank a list of items that they identified as the most important. These items were ranked on a scale from 1-5, with 5 being 'the most important'. The role of governance and leadership was consistently ranked among the top three positions, in some capacity or another. This includes that 'the Victoria City government and others in power publicly champion all genres of local music', which ranked at 4.47 for industry workers and 4.55 for artists. Given the presence of the Victoria Music Advisory Committee, positive steps have already been taken. However, more must be done to grow the ecosystem.

Action 2: Promote All-Ages Access to Venues, Spaces and Events

When to implement: 12-24 Months²⁰

COVID-19 timeline impact: Can be prepared during recovery for post-recovery implementation

The City should amend local policies, permits and zoning to allow for routine all-ages venues and events. Utilize the partnerships between cultural representatives and government agents to devise a plan of implementation including safety measures, regulatory frameworks and proper licencing. City planning departments will become vital to this process, as it will require an assessment of target locations. Transportation options and operating hours will become increasingly important throughout the planning process, and it is recommended that the City and the creative industries maintain a consistent channel of communication. It can start by piloting an all-ages project and scale it to the creation of permanent all-ages music venues. This is also true for re-designed permits.

It should be recognized that the parameters around liquor-licenses are creating barriers to all-ages events, whether this includes restricted areas off-limits to those who are underage, or the inability to maintain a liquor license and all-ages permits in the same function. For example, if venues are unable to engage audiences due to lack of all-ages participation, ticket prices, alongside food and beverage prices, will inherently increase to offset lost sales. This, in turn, can potentially make it unaffordable for younger audiences to buy the tickets and overall creates an existential financial problem for the music ecosystem as a whole. Understanding this may also inspire the creation of a basic permit that allows for both under-age access and liquor consumption. Furthermore, enhancing opportunities for young artists to perform locally, through all-ages events and venues, will increase the reverence of local musicians, increase the opportunities for local artists to perform and build a stronger connection with the broader music ecosystem. All this while creating the audiences of the

²⁰ This timeline was established in reference to the City of Seattle's amendments to the Seattle Teen Dance Ordinances.

future.

A key focus will be to organize clear communication and regulations through cross-sector partnerships. Potential partnerships include, but are not limited to; Victoria City Council, Victoria Music Advisory Committee, local music venues, local property development companies, Victoria Fire Department and the Victoria Police Department.

Why Is It Important?

During the community engagement stages of this study, those who attended roundtables, participated in interviews and took part in the survey identified a lack of all-ages venues and events. The primary area of interest became wanting to engage the entire music community and remove barriers for young people to perform or attend events, the primary goal being to broaden the music audience. The survey findings identified that over 26% of music industry workers believe barriers to all-ages events have negatively impacted their business operations. External to these results, the lack of venues and events that are able to host all-ages audiences is creating a disconnect amongst the music community, which can impact the output of the greater music ecosystem as a whole. In addition to this, the barrier to music also prevents local music fans from connecting with international artists who are touring within the city. This can lead to issues such as youth drain, or loss of talent retention, as artists will seek other locations to support their music goals.

Best Practice Case Study - Seattle All-Ages Dance Ordinance²¹ - Seattle, US

What Is It: Seattle has published a Nightlife Establishment Handbook that allows the distribution of All-Ages Dance Business licences. The license is required for anyone operating an all-ages dance with 250 or more attendees, and for all persons operating an all-ages dance venue. For dedicated all-ages events or venues where no alcohol is served, performers of any age are allowed at all times during regular operating hours.

Who Is Responsible: The City of Seattle and the Office of Film + Music

What Has It Done: The All-Ages Dance Ordinance (AADO) replaced an older measure, the Teen Dance Ordinance (TDO), and improved the ability to regulate potential problem venues. Under the TDO, only one license was ever successfully issued and only one enforcement action was undertaken in 15 years. The AADO ensures that any issues that arise will have more regulation and, therefore, improved safe access for a broader segment of the population.²²

²¹ City of Seattle (1995-2020)

²² Nick Lackata (2002)

Relevance: Throughout the roundtable discussions and within the research of Victoria's music ecosystem, all-ages music access became a primary area of focus. It is important that Victoria not only maintains youthfulness in the city, but removes music community barriers, should they want to yield the benefits of a complete music ecosystem.

Action 3: Initiate the Agent of Change Principle

When to implement: 1-12 months²³

COVID-19 timeline impact: Can be prepared during recovery for post-recovery implementation

Through city planning and economic development commissions, a plan to protect music-hubs and spaces will become increasingly important. As such, music advocates must initiate conversations with the City surrounding the creation and implementation of the Agent of Change principle, supporting all music venues and creative spaces in Victoria. Agent of Change is a measure that places the responsibility of noise attenuation and soundproofing in the hands of the newest development rather than any existing businesses.

Before actualizing a plan to implement this principle, conversations and considerations surrounding zoning, bylaws and city planning must occur. Utilizing and periodically updating the asset map offered in this study will lend a holistic overview of where music assets are located across the city. This can help to guide the conversations and future developments. Conversations should include strategies for implementation, clear channels of communication and a stronger relationship between music communities and local governments. In some cases, the definition of cultural infrastructures will need to evolve, especially in the way in which the city designs and plans around our venues.

Zoning bylaws, city planning and permitting are considered to be of the utmost importance when devising Agent of Change principles in a local music ecosystem. The initiation of such policies may require partnerships with: the Victoria City Council, the Victoria Building Department, the Capital Regional District, the Victoria Arts Council and the Late Night Taskforce.

Why Is It Important?

Victoria recently experienced the closure of two beloved music venues, including the Night Owl.²⁴ Others, such as local jazz institution Hermann's have been working relentlessly to

²³ This timeline does not call for the implementation of the Agent of Change policy, rather, it suggests the commencements of conversation and collaboration for future implementation.

²⁴ Victoria Music Scene: Night Owl (2020)

continue their local operations.²⁵ The music study has identified little to no support systems or protective policies for music venues, which puts them at risk of closing. When this occurs, it affects the whole ecosystem and limits the spaces where artists, fans and music communities can harness their relationships, and the potential output of the local music economy. Without a place to practice, artists cannot hone their skills. Even more so, employment of the broader music ecosystem declines, impacting the city and province as a whole.

Best Practice Case Study - Chapter 116²⁶ - San Francisco, US

What Is It: Chapter 116 of the San Francisco Administrative Code was passed in December 2015. This Agent of Change law protects venues which operate at sound levels within the limits of their permits, regardless of complaints from new builds. The code specifies that it is the responsibility of the property developer of a residential unit to inform incoming tenants of existing sound sources in the area. The code also protects existing venues from sound complaints issued by hotels or motels within 300 feet of the venue.

Who Is Responsible: The San Francisco Entertainment Commission oversees noise complaint issues city-wide.

What Has It Done: San Francisco was one of the first North American cities to introduce the ordinance, and it has since served as a best practice example for places such as Austin and the UK.

Relevance: Music venues are a core component to any music industry around the world. Without venues, artists don't have an opportunity to 'test their products' or establish themselves as practicing artists. In addition, a lack of venues and the inability to protect them detaches a music audience from the music scene. Performers and audiences must have the opportunity to build a connection. It should also be noted that music venues are key contributors to the economic output of a city. The Agent of Change principle can create a protective mechanism.

Action 4: Offer Extended Venue Operating Hours

When to implement: 24-48 Months²⁷

COVID-19 timeline impact: Can be prepared during recovery for post-recovery

²⁵ Victoria Music Scene (2020)

²⁶ City and County of San Francisco (2015)

²⁷ This timeline is an extension of the recommendation to create a night-time advisory board, as it requires support from the commission. The additional 12 months is in alignment with the 24-hour Permit Pilot Project in Amsterdam, which spanned just over a year.

implementation

To support the night-time economy and the overall music ecosystem, the city of Victoria should introduce permanent after-hours permits in Victoria, through a slow and well-monitored piloting project. It is important to ensure the steps taken to create such permits are done through partnerships with local authorities, such as health and safety departments, and with a rigorous amount of planning. At the same time, extending BC Transit's operating hours to match this extension should be considered.

Oversight and monitoring of such programs are essential. A successful piloting program will include collaboration with existing venues. Once permit piloting efforts begin to function at a high-quality level, conversations surrounding the establishment of after-hours operations should commence, following similar procedures. Increased economic outputs and an increase of performances for local artists are the most obvious, yet important, outcomes associated with this action area.

The Victoria City Council, Victoria Police Department, Late Night Taskforce, venue owners, local security organizations and the Victoria Community Planning Division must be operating on the same page to ensure these acts are successful. As a whole, music venues, owners and audiences, to name a few, will benefit substantially. Social, cultural and economic values will also inherently increase as a result.

Why Is It Important?

The foundational elements of a night-time economy include venues, accessibility and, most importantly, regulation. This allows night-time activity to be as fluid and functional as daytime activity while also allowing for more vibrancy and social value. Oftentimes, night-time activities engage people of all ages and backgrounds, making it inclusive in nature, while adding substantially to a city's economic output. It is important to recognize that a night-time economy is not synonymous with alcohol consumption. In contrast, Victoria's Late Night Task Force must continue to produce measures of safety, accompanied by clearly defined regulations to ensure inclusivity and overall engagement.

Currently, there is limited access to music-related events outside of bar and lounge operating hours, which usually concludes at 2:00 AM. This is creating a gap in the music ecosystem and limiting the economic output of the music and entertainment sector. When harnessed correctly, night-time economies can produce equally with those of the daytime. An extension of operating hours will also be particularly beneficial in the immediate post-COVID economy as part of the recovery process. As such, Victoria must find a way to amend its current permitting and policies to accommodate a more robust and attractive night-time economy, which should be addressed with careful consideration and a high degree of care.

Best Practice Case Study - Extending Music Venue Operating Hours²⁸ - Austin, US

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 neighbourhood 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.

The pilot ended with satisfactory results: the program evaluation showed the extension resulted in a consistent increase across all venues on 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 neighbourhoods and reducing the number of noise complaints registered.

The successful pilot was passed into an ordinance in 2018, and the participating Red River venues now benefit from extended curfews of 12am on Thursdays and 1am 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.

Who Is Responsible: The City of Austin

What Has It Done: The extra hour aimed to increase sales, helping venue owners to pay rents and provide higher compensation to local artists. This has also revamped the city's sound monitoring process to ensure the extended live music hours do not impact the quality of life for nearby residential neighbourhoods. It has continued and formalized communication and relationships between venues and residents to work collaboratively to understand each other's needs to resolve issues and encourage mutual accountability.

Relevance: As Victoria grows their music sector, the success of the growth will be largely dependent upon the functions of their late-night economy. Venues and bars do not simply represent a place for alcohol consumption, but rather serve as the main point of communication and practice between music fans and music players. Offering

²⁸ City of Austin (2018)

late night venue permits allows for greater engagement, more opportunity for musicians to practice and greater economic output.

Crisis Relief Measures

Included below are two examples demonstrating how those in leadership and governing roles can support music city actors during times of crisis. These examples are offered as a reference point for action, and although immediate implementation would be a challenge, there is an immediate need to begin constructing similar support. The implementation of such programs will undoubtedly vary and should be assessed based on the specific needs of the local music community.

Impala COVID-19 Crisis Plan²⁹ - Europe

Initiated by: The Independent Music Companies Association (IMPALA) is a not-for-profit association with over 5,000 members representing record labels and national trade organizations.

Relief Initiative: Impala established a COVID-19 Task Force that created a list of 10 recommendations offered to the EU to support music on a local and national level. The list is informed and accompanied by an ongoing musician survey, highlighting the importance of music relief funds, government action and the need for a country-wide relief effort to maintain the livelihood of musicians. Included in the list of recommendations are: the need for a joined-up approach across Europe, increased EU loan guarantees for cultural sectors, monitoring national action and integrating culture in general EU decisions and digital services action. A second wave of recommendations was released in November 2020 and included points such as: extending key crisis measures and creating five-year strategies, earmarking 6% of the entire recovery budget for cultural aid, declaring record stores as essential retail and thus allowing them to remain open and suspending value added tax on live streamed concerts and music retail.

What Can Be Learned? Partnerships and collaboration are a common theme throughout the entirety of the listed recommendations. Perhaps the most valuable of all is the need for universal measures across all levels of government. Victoria does have a good start in relation to this, being that a Music Advisory Committee is already in effect, pushing for music-friendly policies. As Victoria and British Columbia

²⁹ Impala (2020)

continue to roll out plans to preserve their music ecosystems, perhaps a collaborative approach between communities and government may help identify exactly what needs are not being met. As such, music advocates could potentially begin compiling a list of recommendations locally, as a means of informing others how best to support music communities through times of crisis.

Nashville Mayor John Cooper's COVID-19 Response Fund³⁰ - Nashville, US

Initiated by: Local Mayor John Cooper, in partnership with the United Way of Greater Nashville, chaired by former Senator Dr. Bill Frist, and in support of nonprofits and faith-based groups.

Relief Initiative: This is a donation-based fund that aims to directly support those who are suffering from wage loss, particularly cultural groups (inclusive of music and arts organizations). This initiative has already garnered over \$3.5 Million (USD) and continues to grow.

What Can Be Learned? Music is a community, if nothing else. When endorsement and a willingness to support cultural groups comes from those in governing positions and decision-making groups, it not only increases the public perception of creative industries, but it also indicates a strong connection to creative industries. In this particular case, the willingness to support the music ecosystem is being funded by the public, not solely the government. Victoria, although already supporting artists through a provincial fund, may consider implementing a similar initiative, perhaps one that is well in advance of other potential risks and collected in anticipation of crisis relief.

³⁰ Nashville Response Fund (2020)

7.2 DIVERSITY AND EQUITY

Inclusion and diversity are key components in Victoria, as well as British Columbia as a whole. Recognizing the importance of diversity and equity is of the utmost importance in any music ecosystem, and given the existing infrastructures, there is always opportunity to further efforts to maintain equality and provide tools for growth. It is critical that a music ecosystem accurately reflects the current world in which they do business: a world that is vastly diverse, unique and inclusive. Music is meant to be all-access. For the following recommendations, engagement with groups like the First Nations Council or the Intercultural Association of Greater Victoria, as well as other diversity-related associations, will be key.

Action 5: Facilitate the Creation of Music Education and Professional Development Grants for Indigenous Peoples and Marginalized Communities

When to implement: 12-18 Months

COVID-19 timeline impact: Can be done during recovery

To enable more inclusion in the music sector, relationships with vulnerable communities must be harnessed. Cultural associations, city agents and music actors must be involved in this process. This should begin with a survey or assessment of the needs found in different marginalized communities, such as BIPOC, LGBTQI+, female-identifying and Latinx community members. Doing so will allow for a thorough understanding of the barriers and gaps that are prevalent in the music industry. It is essential that, throughout this process, cultural differences and traditions are acknowledged and integrity maintained, something that can be achieved with continued communication with representatives of these communities. A particular focus should remain on creating more inclusive music education opportunities.

The disadvantages faced by Indigenous populations should also be directly addressed by offering grants and funding to music programs and professional development. This will help to establish more involvement in the music ecosystem. These initiatives should support, in some form, career sustainability, while also being available to all genres and talent levels. Given the boldness and the extreme need to create a more inclusive music sector, partnerships must be established. The Government of British Columbia, Victoria Arts Council, Indigenous Perspectives Society, and the Intercultural Association of Greater Victoria, amongst others, must establish cohesiveness in order to address the direct needs of the music community.

Why Is It Important?

The cultural uniqueness and the perspectives of Indigenous peoples add significant value to Victoria's music ecosystem. Storytelling, civic living and uniqueness are key attributes associated with a music city, and it is important that Victoria offers the opportunity for minorities, marginalized populations and Indigenous peoples to participate in this form of musical expression.

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Despite having a rich Indigenous heritage in Victoria, there is a lack of representation found in the music industry and the broader music ecosystem. For example, Indigenous populations only represented 0.7% percent of respondents who consider themselves to be directly involved in the music industry (Music/Entertainment Business or Nonprofit Organization, Employee or Contractor). This gap is not a true representation of how Victoria harnesses their relations with Indigenous cultures. However, it does signify that more can be done to include and support them. Music education and career development grants will allow for early-age access in the music industry, increased musical abilities and sustained growth. In addition, having a fund or granting program will also help Indigenous populations to sustain their careers, which has the potential to inspire future musicians.

Furthermore, the National Indigenous Music Impact Study found that 35% of Indigenous artists' income came from government funding, while 16% (the next largest portion) came from live performances.³¹ With the live entertainment industry at a halt, government funding is perhaps more important than ever. As performance opportunities begin to grow again, Indigenous-focused funding will be an opportunity to recognize and address the additional costs that are associated simply with being Indigenous, particularly when living on a reservation, where resident artists have expressed that opportunities for performance and business growth are rare and travel costs are higher to get to those locations that do have such opportunities. Without doubt, meaningful relationships, cultural understanding and personal connection play a major role in music communities.

Best Practice Case Study - Nova Scotia Arts Equity Funding Initiative³² - Nova Scotia, Canada

What Is It: The purpose of this program is to support those who have historically been marginalized and face barriers when entering the music sector. Funding from this program supports new and established artists, whether it is through artist development, production or growth.

Who Is Responsible: Arts Nova Scotia and Support 4Culture

What Has It Done: In 2018 alone, this program provided over \$85,000 in financial support for over 10 different artists.

Relevance: The surveying process yielded very little representation for marginalized communities and Indigenous members, indicating there is a need to create a more engaged and inclusive music community in Victoria. The voices, perspectives and stories offered through the lens of culturally-rich groups are of the utmost importance

³¹ APTN and NVision Insight (2019) "National Indigenous Music Impact Study". Online at <https://www.aptnnews.ca/wp-content/uploads/2019/11/Music-Impact-Study.pdf> accessed 17-3-2021

³² Arts Nova Scotia (2020)

in a music ecosystem, therefore it is critical that Victoria reduces barriers and offers a platform to promote such groups.

Action 6: Involve Indigenous Communities in the Planning and Programming of Events

When to implement: 12-16 Months

COVID-19 timeline impact: Can be prepared during recovery for post-recovery implementation

The City of Victoria must involve Indigenous communities and music professionals in the planning, programming and coordination of all music-related actions and activities. This should be done to ensure that the historical perspectives and contributions of Indigenous populations are effectively merged into the civic and musical identity of the City. Positioning Indigenous representatives in city planning and events means including them on committees and appointing them to be in positions of leadership. This can be done by introducing dedicated Indigenous Culture Officers, or by ensuring equitable representation in the city's departments. Relationships with Indigenous communities must be properly harnessed, and an in-depth understanding of the traditions and identities of such groups must be taken into account as the city develops cultural infrastructures and events (museums, galleries, festivals).

What makes a city unique is the ability to hone in on its local identity. Doing so requires a city to harness its local heritage, both musically and culturally, and put in place advocates, systems and agents that contribute to its values. It is important that the broader music ecosystem proactively seeks engagement from underrepresented communities. To make this possible, many organizations and advocates must operate with these goals in mind. This includes the City of Victoria, Victoria Arts Council, Indigenous Perspectives Society, Intercultural Association of Greater Victoria and Victoria Native Friendship Centre.

Why Is It Important?

Music must be inclusive and accessible. It is essential that Victoria encompasses a more culturally rounded music community, facilitating the development of music professionals in all positions. This includes artists, music industry professionals, the whole event production value chain and executives. Victoria's Indigenous groups are significantly underrepresented across all parts of the music ecosystem. For instance, the community engagement survey showed that less than 2% of the city's artists and music industry professionals identify as Indigenous. Victoria has an opportunity to lead by example by incorporating Indigenous professionals and artists in all major music events and city-led messaging around music. Cultural Advisors and committees focused on underrepresented communities are becoming increasingly important

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and may also become a priority as the music ecosystem develops.

Best Practice Case Study - Indigenous Music Artist and Professionals Initiatives - Brisbane, Australia

What Is It: The state of Queensland is set to have the largest density of First Nations people in Australia in the next few years, yet their involvement in state/capital-run arts and culture events and programs has only recently become a focus of the provincial and municipal governments. These efforts, however, have already brought successful collaborations in arts and music, and have helped establish Brisbane as a leading and diverse music ecosystem in Australia.

Who Is Responsible: Brisbane City Council, QMusic, Arts Queensland, Tourism and Events Queensland and Brisbane Marketing

What Has It Done: Brisbane City Council runs Gathering, a dedicated showcase for Aboriginal and Torres Strait Islander artists happening weekly in downtown Brisbane.³³ There are various professionals from Indigenous groups sitting on the Indigenous Advisory Committee for the city's flagship Brisbane festival, which appointed an Indigenous curator in 2017.³⁴ Additionally, the Queensland Music Industry Development Association QMusic has included an Indigenous category at Queensland Music Awards.

In 2018, BIGSOUND, the city's leading music industry conference and showcase festival, introduced a recruiting First Nations Producer/Advisor to make the event more inclusive and culturally appropriate and to develop relationships with local and regional Indigenous community associations.

Relevance: It is important for all members of the music community to receive equitable support and opportunities. However, proactively seeking the involvement of underrepresented communities is something Victoria should adopt in its work with the music industry and events. Doing so would not only increase music community partnerships, but it would also build trust by establishing relations with cultural groups, Indigenous communities and marginalized people.

Action 7: Create a Diversity-Centred Music Export Program

When to implement: 24-36 Months

³³ Brisbane City Council (2019)

³⁴ Brisbane Festival (2020)

COVID-19 timeline impact: Can be prepared during recovery for post-COVID implementation

In order to grow a diverse and sustainable local music ecosystem, Victoria should create a Diversification Music Export Program. This program should facilitate showcasing while offering artists the opportunity to take part in export-ready preparations. It is absolutely essential that this program remains inclusive of all genres, styles and traditions. Music BC, Canada Council for the Arts and the British Columbia Association of Aboriginal Friendship Centres encompass only a fraction of the foreseeable partnerships needed for this program to succeed. Through this program, Victoria can experience an enhanced social value, a stronger international reputation for having inclusive music communities and a more diversified music ecosystem.

To organize an export program, networking and coalitions will become essential. A liaison or primary actor should be assigned to organize opportunities both internally and externally, working together with the Music Office and Advisory Committee. It is important for the liaison or program administrators to assess their roster of local artists and begin to identify which skill sets they will need to enhance in order to become 'export-ready'. In most cases, the term export-ready can include, but is not limited to: having released an album with a set amount of minimum sales, having some support team, having an up-to-date marketing and business plan, and having upcoming bookings or a contract for current musical productions or songwriting collaborations. It is important that, when selecting artists for such programs, the requirements associated with becoming an export-ready artist are honed and fostered through resources, workshops and mentorships. Selecting artists for the program can be done through online applications and live showcases.

Why Is It Important?

Victoria's Indigenous population is situated in the outer regions of the city, making it challenging to offer the same support as the inner-city music community, not the least of which is the added challenge that comes with finding convenient and affordable means of transportation to and from venues and performance opportunities in the city. Harnessing relationships between the City and Indigenous communities is critical to a city's quality of life, but it is even more important in relation to music ecosystem functionality. The Indigenous perspective adds significant value to Victoria's musical heritage and identity, capturing the uniqueness of Victoria's culture.

Diversity and inclusiveness continue to remain a priority for the music community, as found in the survey. When asked to rate the importance of music leadership and advocacy groups in Victoria being inclusive and diverse on a scale of 1-5, respondents rated it a 3.53. In contrast, those who identify as Metis represented 0.3% of the artists surveyed. Indigenous and cultural perspectives are invaluable to all music systems and help audiences connect with the land and history of Victoria. As such, Victoria must provide a platform that not only allows global audiences to engage with the music but also provides equitable opportunities to Indigenous populations. Currently, there are limited support systems for Indigenous and culturally diverse artists, leading to less participation in the music ecosystem.

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Best Practice Case Study - Manitoba Indigenous North/Music Export Program³⁵ - Manitoba, Canada

What Is It: This program aims to provide music export opportunities and support to Indigenous peoples who produce, record or perform music. This new initiative builds upon the Indigenous Music Development Program, which encompasses a wide-range of music development opportunities. In 2019, a music export officer, Jade Harper, was hired to begin maximizing outreach of the program.

Who Is Responsible: Manitoba Music and Government of Canada

What Has It Done: This program was announced in early 2019, and an international Indigenous showcase has already been developed, allowing select artists to travel and perform in Australia and Germany.

Relevance: There was limited engagement from Indigenous communities throughout the stakeholder engagement process, indicating that there are barriers and gaps in the music ecosystem. It is critically important for Indigenous artists to contribute and lead in the music industry, ensuring it is a well-rounded, robust and inclusive community. To increase participation, develop inclusive support systems, and effectively promote Victoria's music heritage, the city should develop a music export program similar to the one in Manitoba.

Crisis Relief Measures

During times of crisis, those who identify with minorities or as an Indigenous person must be able to rely on their communities, agents of change and support systems. As an already vulnerable population, pandemics and economic crises can hurt these groups even harder than most. There is more than one way to ensure the livelihood of these music communities, and methodologies for doing so are dependent upon the relative music ecosystem. For a foundational reference, there are two examples below which can be used to inspire recovery efforts in Victoria.

Indiana Music Industry Relief Fund³⁶ - Indiana, US

Initiated by: This initiative is a collaboration between MidWay Music Speaks and Girls

³⁵ Manitoba Music (2020)

³⁶ Midway Music Speaks (2020)

Rock Bloomington. Both are non-profit organizations that focus on equal and equitable opportunities for women-identifying and non-binary music actors. From summer camps to large scale festivals, these initiatives are dedicated to providing a platform to a more inclusive and diverse music sector in Indiana. This includes educational offerings, mentorship programs and workshops.

Relief Initiative: Musicians, artists and organizations who are woman-identifying and non-binary have access to \$250.00 (USD) as initial support, while a donation program is being implemented to further support those in need. Retail clothing and products are also being sold to garner more funds for distribution.

What Can Be Learned? When a diversity group has adequate representation, especially when engaging in collaborative efforts, they are much more likely to receive the support they need. This is a prime example of how having the right infrastructure will ensure that no members of the music community are left behind. Although the economic benefits may not be astronomical, the creation of retail products being sold to establish larger funds demonstrates how creativity and reliance on the community can become so important during times of need.

The Horizon Foundation³⁷ - San Francisco, US

Initiated by: The Horizon Foundation, located in San Francisco, California, is the first-ever community of, by and for LGBTQ people, awarding over 48.6 million dollars to LGBTQ non-profits and community groups since their creation. The primary function of the Horizon Foundation is grant creation, but they also provide scholarships for education and funds for faith-based events and cultural celebrations.

Relief Initiative: For the organizations that qualify, the Horizon Foundation is offering a one time payment of anywhere between \$2,000 - \$20,000 (USD) to those who have been impacted by the COVID-19 virus. The relief fund totals over \$275,000 (USD), with \$75,000 of that coming from community supporters. As of September 2020, 71 nonprofits and organizations received a cumulative \$940,000 in emergency relief funding.³⁸ The grants were used to provide food and shelter, obtain legal assistance, undergo facility repairs and coordinate community outreach programs, among other uses.

What Can Be Learned? British Columbia is highly-regarded for its support and

³⁷ Horizon Foundation (2020)

³⁸ Bartlett (2020)

upliftment of LGBTQ communities. Much like the Horizon Foundation, there are grants, funds and scholarships designed to further develop these groups. It would not be difficult to imagine a fund, such as the Horizon Foundation Relief Fund, replicated throughout the province and in Victoria. It is evident that having large support groups that dedicate themselves to offering equality can yield massive rewards for those in need, especially vulnerable and marginalized communities. Although it may not be immediate, collaboration with existing organizations may help with establishing a fund of this stature. Doing so will certainly aid those who are critical to the music ecosystem and must maintain business operations in some capacity.

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7.3 MUSIC EDUCATION

Music education in Victoria is progressive, innovative and built upon a strong foundation. From music therapy to technology and a wide array of private or public lessons, there are opportunities in abundance for those interested in learning. The more opportunities there are to learn within a city, the more likely a city will retain its talent. Education is constantly evolving and, as such, offerings should also do the same.

Action 8: Support Music Education and Educators through Grants

When to implement: 24-36 Months

COVID-19 timeline impact: Can be done during recovery

To improve the educational offerings in Victoria, music educators must feel supported in their efforts. Funding and grants provide an opportunity for instructors to offer innovative and modernized lessons and content, while also trusting that the local music ecosystem acknowledges their value. A music education program or initiative will better serve the local music sector in its entirety. On a fundamental level, music education is invaluable regardless of whether it is an early-age training program or a specialization diploma to increase an artist's proficiencies. In most cases, marginalized communities do not have access to programs of this nature. It is important that this is not overlooked in Victoria. Both educators and students should have the opportunity to choose a career in music, both of which start with earning an education in the same field.

To ensure these barriers do not exist, the city must work together to offer financial support specifically designed to improve access to music programming. Partnerships and understandings between the Department of Education Victoria, Canada Council for the Arts, the Victoria Arts Council, the BC Registered Music Teachers' Association and the Government of British Columbia are needed to activate such a program.

The first and perhaps most important step is to develop an understanding of the demand for music programs alongside the barriers that prevent access. Community engagement will be key, as will acknowledging the perspectives of music instructors. Through the lens of music educators, a city can better understand where students may need help, how programming can be simplified and to what extent funding will be used to enhance the offering. Overall, this initiative demands that the music community come together in support of the greater music ecosystem.

Why Is It Important?

For artists in Victoria, music education and instrument learning is one of their top priorities for their development as a musician. On a 5-point scale, artists rated the importance of access to music education at 3.72, where industry workers similarly rated this area at 3.85. In regard to equitable access and fairness, industry workers and artists rated this a top 3 priority, at 4.27 and 4.29, respectively. An assessment of the education offerings in Victoria found that there is minimal support available to music education programming. This is not only true for educators

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to provide instructions and programs but for underprivileged and marginalized communities to obtain an education.

There is no doubt that education is the key to professional growth. However, financial support for such opportunities is not in abundance, making it less likely that artists will pursue a career locally or participate in the music community. In the worst cases, potential musicians and artists become reluctant to become practicing musicians as they do not have fundamental skill sets. Music educators may also find themselves in similar situations. These problems are exacerbated in more remote areas, where access to educational resources or high-speed internet plays a hindering role in artistic growth and development.

Action 9 : Support the Development of 'Soft-Infrastructures' in Victoria through Education Programs

When to implement: 12- 18 Months

COVID-19 timeline impact: Can be done during recovery

Victoria should aim to create specified music business courses to initiate more soft infrastructure positions and agents in Victoria. Developing a music business certification program or a music business law course that is offered at local universities and colleges will build a foundation for practicing music professionals in Victoria. It is important that these programs and offerings are accredited, perhaps even directly tied to other institutions with solidified reputations. Such programs should end in specialised Internship Programs for graduating students.

Once programs are constructed, Victoria will be able to develop the infrastructure it needs to support its musicians. In addition, student populations and music tourism could begin to grow, given the specialized areas of study. Undoubtedly, drawing in international and national students will enhance the knowledge and value of the local music industry. However, this will not be possible if entities such as Royal Roads University, the University of Victoria, St. Michaels University School, the Greater Victoria Teachers' Association and the BC Registered Music Teachers' Association cannot rely on the expertise of established musicians to further develop courses.

Projected considerations associated with building a music education program include organizing a panel to facilitate the program development, surveying for market demand and ensuring the program delivery method aligns with the needs of the market. The successful creation of a program will require program leaders to devise a budgeting and funding scheme and organize institutional affiliations. The curriculum and program design must also align with accreditations. Finalizing the accreditation process is usually the last step prior to the promotion and marketing of the program.

Why Is It Important?

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Roundtable conversations and interviews conducted in Victoria indicate that artists need more career support, mainly in relation to legalities, marketing, tour management and financial advisory. Through the asset mapping process, it was recognized that the majority of booking agents, record labels, music publishers/administrators and PR/marketing agents used in the city are not locally based. More than half of industry survey respondents (75%) claim that they don't have any business relationships with any other industry agents. It is important that musicians and artists have access to career support. If there are not enough people who have expertise in these fields of study, artists will look elsewhere, leading to talent drain and creating a sequence of barriers to music career success. Having these professionals will also boost the economy, and they can work with non-local musicians bringing talent and money from outside the city.

Best Practice Case Study - Berklee Music Business Law³⁹ - Boston, US

What Is It: The Berklee Music Business Law Course examines the many legal facets of the music industry, including band agreements, publishing, trademarking and download streaming. This is offered as a graduate-level course and is available online on an annual basis, beginning in April.

Who Is Responsible: Berklee College of Music

What Has It Done: Outcomes of the course instruct how to analyze legal issues in a broad range of areas connected to the music and entertainment industry, including songwriting, recording, touring, distribution and technology.

Relevance: Victoria already provides progressive music education opportunities, whether in film and gaming musical scoring or music therapy certifications. It is important that Victoria leverages their already exemplary offerings by including music business courses. Doing so will assist in establishing more music infrastructure locally.

Action 10: Create a Database of Indigenous Music Education Resources to be Used with the Local Curriculum Guidelines

When to implement: 1-12 Months

COVID-19 timeline impact: Can be done during recovery

Indigenous populations have made significant contributions to Victoria's musical heritage and identity. Through storytelling and personal perspective, Indigenous artists continue to play a

³⁹ Berklee Online (2020)

substantial role in developing the local music sector. However, in addition to recognizing these contributions, there is a need to better inform and understand the practices and musical history of Indigenous peoples. As such, access to music resources offers an ideal starting point for helping to not only explain the musical practices of Indigenous peoples but also to educate students and youth on their history, perspectives and impact. Thus, it is recommended that Victoria creates a resource bank of music lesson plans, videos and other educational devices, perhaps on a website, creating a convenient, yet dependable opportunity for educators to teach about Indigenous cultures. This database and resource bank will exemplify the many contributions of Indigenous peoples, as an increased understanding of Victoria's Indigenous communities allows for more connection, but more importantly, it tells the true story of Victoria's heritage. To ensure the information, videos and resources are accurate portrayals of Indigenous peoples, it is important that it is organized in partnership with Indigenous artists, musicians and communities.

Why Is It Important?

Throughout the roundtable discussions, it was mentioned that the opportunity to learn about Indigenous music and heritage was relatively low. Even more so, there tends to be a disconnect between Indigenous and non-Indigenous communities, particularly when it comes to understanding and connecting to their history and even their present-day music. Without question, building a connection amongst the entire music ecosystem requires an appreciation for all those that contribute to the music sector. In order to do so, all parties must have a chance to learn and comprehend the perspectives of their music-mates. For that reason, it is also paramount that the resource bank is made by local artists and places a major emphasis on the local perspective and history. This can be complemented by in-school music programs, if available. In its entirety, this resource bank will help prioritize Indigenous education, while also opening up further conversation and exploration of Indigenous cultures.

Best Practice Case Study - National Arts Centre (Music Alive) Resource Guide - Ottawa, Canada ⁴⁰

What Is It: The National Arts Centre in Ottawa has created a resource bank pertaining to arts, music and culture. The resource bank is dedicated to bilingual musicians and artists, as well as Indigenous arts and legendary composers. Each of these areas is complemented by videos, hyperlinks and lesson plans designed to work harmoniously with local school curriculums. The list is applicable for a wide range of grade levels and age groups, allowing for early exposure to multicultural music, traditions and practices.

Who Is Responsible: National Arts Centre

⁴⁰ National Arts Centre - Music Alive (2020)

What Has It Done: The creation of this database has provided a streamlined process for educators who are looking to integrate diversity and multiculturalism in their curriculums. Providing easy access to educational resources not only simplifies the process of lesson planning, but it also ensures that students and youth gain an appreciation for the contributions made by Indigenous musicians and artists. In turn, this connects students to the heritage of their city and/or town.

Relevance: If Victoria were to adopt a similar resource bank, they would be able to effectively tie their own music heritage into their local music and arts curriculum. By providing this resource, Victoria will tell its 'civic story' while informing others of the Indigenous history within the city. Much like the National Arts Centre, Victoria must look to involve Indigenous populations to curate, filter and select proper resources. In doing so, Victoria will be able to guarantee that the information being offered will be accurate and properly represent the unique history of its Indigenous peoples.

Action 11: Offer More Local Internships

When to implement: 12-18 Months

COVID-19 timeline impact: Online roles can be introduced during recovery, but practicums must be launched post-recovery

The opportunity for students to immerse themselves in the music business plays a critical role in how students assess their potential future as practicing professionals. To aid them in this, more internship opportunities should be provided, with the assistance of educational institutions and in alignment with the BC Curriculum. Devising an internship program requires careful consideration in regards to the selection of institutions to offer the program, drafting of program requirements and measurements of success. As such, educators and established musicians must be positioned as thought leaders when establishing music internships. As a result, curriculum expectations and measures can be put in place, while artists can contribute their knowledge on how to position internships in meaningful ways.

In addition, a particular focus should be placed on devising budgeting and funding schemes to support internship opportunities and organizing institutional affiliations and training sites. Those who facilitate these programs should aim to utilize grants offered by the City. This will allow for subsidized salaries and may allow programs to gain traction at a lower cost. Internships and program development for this action item will require a diverse network of music actors. Partnerships with the University of Victoria, St. Michaels University School, Royal Roads University, the BC Registered Music and the Greater Victoria Teachers' Association will be essential for this initiative.

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Why Is It Important?

Artists and music enthusiasts are much more likely to foster their talents locally if the proper supports are in place. Internships offer an opportunity to gain experience working as a music professional while providing insights into how the music business operates. Oftentimes, it is assumed that roles in music are limited to musician, producer, engineer or songwriter, amongst other creative roles, but this is a common misconception. There are a vast number of opportunities to contribute to the music ecosystem and build a career external to performing or writing music.

Victoria should aim to increase the number of local internships offered in a diverse range of music skills and experiences. It is recommended that internships are offered at all talent levels to allow for modernized learning opportunities. This is especially important for those who are just entering the field of music, as it allows them to explore more possibilities. Roundtable discussions surrounding music education unveiled that there has been a decline in students pursuing a career in music. Part of this is due to the lack of knowledge surrounding potential career options. This action aims to help solve that issue.

Crisis Relief Measures

Education is not just a fundamental piece of a music ecosystem, it is an invaluable part of all cities around the world. During times of crisis, people crave knowledge and education more than ever before, and the unexpected downtime created by the shutdown is a great opportunity to build business skills. This is no different for musicians and artists. Given the technological advancement in music production and composition, music education is as accessible as ever, especially when a city learns to harness the power of virtual learning. In such unpredictable times, adaptability and resilience are imperative. Below is an example of how a music city advocates to prioritize music education during a pandemic, demonstrating that those in creative industries will always find a way to support their community and put the value of music and art first.

Generation Musicians⁴¹ - Florida, US

Initiated by: McKay Music is a music school located in Fort Lauderdale, Florida. The vast majority of their work supports music educators and students by offering in-home and online lessons, as well as ‘celebrations of music’, which includes hosting themed music parties at select venues around the city. Music longevity is the driving force behind the company, using creative methods to bring the value of music to all those who want access to it.

⁴¹ McKays Music Lessons (2020)

Relief Initiative: The emergence of COVID-19 has induced stress and anxiety around the globe, musicians included. Recognizing the mental health benefits associated with music, Mckay Music has launched the Generation Musician program, offering free online music lessons to any age group interested in piano or guitar. In addition, this program is connecting educators to music students, creating a platform for instructors to access online teaching opportunities. To apply, students and educators simply select a sign-up form, and they are connected with a teacher almost right away.

What Can Be Learned? Creating programs to support our music communities do not have to be drastic measures. At times, simplicity and genuine intent can have substantial value. More often than not, financial assistance is seen as the only way to support our communities. However, it is in human nature to crave new knowledge, and offering a platform to do so is equally as helpful in times of stress. Generation Musicians is a prime example of how music can not only be a means of support, but it can also bring a community together. Victoria has an abundance of music teachers, facilities and programs that, at their core, believe music education is invaluable. Perhaps now, or in the future, a collaborative approach may inspire a similar program.

7.4 AUDIENCE DEVELOPMENT

The connection between a music fan and a musician is perhaps one of the most important aspects of a music career, especially in regards to success and longevity. Live performances and events contribute significantly to the appeal and energy of a music city. Those who host and coordinate such events are also aware that there are a lot of contributing factors that go into creating a quality concert or festival. These include promotion, functionality and awareness. Victoria is familiar with this process, given the number of festivals and concerts held in the city each year. As the city continues to develop its music ecosystem, it will need to find more ways to accommodate activities and audiences of all sizes and talent levels. To aid in this process, the following recommendations will help increase audience participation and entice partnerships while reducing competitiveness in the local music sector.

“Would like to see a more centralized hub for a website to see upcoming music events. I’ve missed out on some that I would very much have liked to attend.”

Survey Respondent

Action 12: Consolidate All Music Events and Activity While Promoting Indigenous and Multicultural Artists

When to implement: 6-12 Months

COVID-19 timeline impact: Can be done during recovery

To boost audience engagement, audiences must be able to locate events and activities with relative ease. Consolidating all events into one place will ensure that audiences do not miss concerts and can stay in-tune with what’s happening around the city. To do so, Victoria should leverage the existing events calendars in the city to create an all-encompassing website that contains all music-related activities in the city. This site should be a “one-stop-shop” for all things music-related. Victoria will need to ensure that their major arts organizations establish a working relationship to create such a calendar or online presence.

As a reference, this should include all music-related news, current events and upcoming shows. It should also contain shows being offered by both local musicians within local pubs and international superstars who are entering Victoria through their tour. The allocation of responsibilities should be distributed to those most active in music promotion, alongside the advice of the Victoria Music Advisory Committee. Those involved in creating a music calendar could include the Victoria Arts Council, the Downtown Victoria Events Calendar, venue owners and art associations. Concert promoters should be able to include their events to ensure it is constantly updated. It is essential that those responsible for this marketing platform offer equitable information for all genres, talent levels and cultural diversities.

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In an equitable and well-rounded music ecosystem, music access and opportunity are essential to the growth and sustainability of the music sector as a whole. Whether this involves allowing fans to engage with artists at a showcase, or providing equitable opportunity for musicians to perform in safe, dependable spaces, there must be clear channels for artists and fans to engage in music.

Highlighting the cultural significance of local Indigenous music is a primary vehicle for doing so, which is why a calendar that highlights all Indigenous and cultural events in the city of Victoria would be beneficial. In this city-wide calendar website, fans and music enthusiasts can select events based on their preferences. This provides a perfect opportunity to promote the musical heritage of Victoria. By creating highlights for Indigenous music, amongst all other related events, fans are given a convenient tool to access shows for a range of talent levels and arts-centred showcases. This calendar could then be effectively promoted by tourism boards as a means of perpetuating Victoria's music identity and celebrating its heritage. The Indigenous BC tourism board could be a primary contributor when creating such a calendar.

Why Is It Important?

Victoria does offer a wide range of entertainment and events, and there are numerous entities and organizations that work to promote the music sector in its entirety. The strong support for music promotion and development indicates that there is also a large demand from music fans and concert-goers. However, when information is spread too thin across many marketing channels, it creates a barrier for audiences. It is important that Victoria acknowledges this and begins to consolidate all music-related events, large or small, into one place. Survey respondents and roundtable discussions frequently touched on the need to simplify the 'event search' process in the city. Having too many outlets simply undervalues the music ecosystem, driving away potential audiences and negatively impacting the overall economic output.

During our stakeholder and roundtable engagement, there was a clear indication that access to other musicians and music-related events was lacking for Indigenous and culturally diverse populations as well. The ability to connect with a wide range of audiences becomes inherently important if a music ecosystem continues to grow. It also allows fellow musicians to build networks and develop partnerships that enrich the music ecosystem. An events calendar allows for such opportunities. If a calendar only offers information on large-scale events or popular artists, the true value of the music ecosystem is missed. Likewise, even dedicated Indigenous calendars will continue to marginalize those artists by promoting them through a non-mainstream channel, and thus a true representation of the music ecosystem is hindered. This can cause artists to either relocate or disengage with the music community as a whole. Even more so, it can create a disconnect amongst cultures, which creates gaps in the ecosystem and prevents the industry from being further enriched by culture. Furthermore, it doesn't allow a range of artists to uncover or explore Indigenous music.

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Best Practice Case Study - NowPlayingNashville.com⁴² - Nashville, US

What Is It: The website NowPlayingNashville.com is a Nashville local events platform created by the Community Foundation of Middle Tennessee. Now Playing Nashville is a nonprofit initiative showcasing a variety of arts and entertainment in Nashville and its surrounding 40 counties, including performances, venues, exhibitions, sports, recreation and community events. In addition to providing information on events, the platform also produces original content, such as event reviews and a podcast featuring local personalities.

Who Is Responsible: Community Foundation of Middle Tennessee, with partners such as Visit Nashville, Ticketmaster and the Tennessee Arts Commission to ensure it is the most complete and up-to-date site to find all of Nashville's events and happenings.

What Has It Done: The design of the music section in NowPlayingNashville.com makes it a best practice example on how to promote music activities in a practical and attractive way for users. Users can search for events by type of event (e.g. concert), keyword/s, event category, venue and city, and they can further select a time period or date range to show all available events. Under the music-specific website page, visitors can browse the section "Live Music Tonight" to see the shows happening in Nashville & Middle Tennessee on that day only, or they can select a genre category to browse events for different kinds of music, including karaoke. Users can read basic information on the event at a glance, including date, artist name, promoter, venue and a short description. On the same preview, users can upvote a concert to publicly show their support and click a button to be redirected to the event's page in a ticket purchasing platform. Registered users can also bookmark events to create a schedule and receive updates on when their favourite artists and shows are coming to town.

Relevance: Access to entertainment and music should be simplistic and convenient. It is important that music fans and festival-goers are able to connect with the local music scene with ease, especially when trying to boost audience engagement. Victoria must ensure that the information they are providing to audiences in relation to music is not spread too thin. If audiences know exactly where to go to find relevant music information, they are much more likely to engage on a routine basis.

Action 13: Create an Event and Festival Strategy

When to implement: 12-16 Months⁴³

⁴² Now Playing Nashville (2019)

⁴³ This timeline is based on the creation of the Sylvan Lake Festival Strategy

COVID-19 timeline impact: Can be prepared during recovery for post-recovery implementation

Victoria has a wide array of music events and festivals annually, many of which are quite successful. In support of these festivals and in pursuit of a stronger music ecosystem, Victoria would benefit by creating an event or festival strategy to support and measure the growth of its live music sector. This includes strategizing around events in other regional cities or with partners in surrounding cities. Having an over-cluster of events forces audiences to choose where to allocate their time and money. This directly impacts engagement and presents barriers to music fans. Healthy competition within the music ecosystem is encouraged, but it is important that each agent of music recognizes that they are working to improve the entire music ecosystem, not just one single area.

An events strategy allows for a holistic perspective as well as a better understanding of how the music ecosystem functions. Increased international reputation and surges in tourism are directly linked to festival coordination and promotion. Together, the Victoria City Council, Create Victoria, Victoria Music Advisory Committee, Tourism Victoria, festival hosts and local musicians, among others, will need to develop a working relationship. Understanding this also means that an events strategy requires careful planning, systems-thinking and collaboration. Special considerations associated with creating an events strategy include: understanding the seasonal impacts on audiences, assessing and recognizing the desires of the market and how to measure success and constructing partnerships with hotel and lodging industries. Launching this initiative will require the city to develop a working group and committee representing different sectors in the music ecosystem. A survey and assessment of the current marketplace and the audience's needs will be essential. Those responsible for creating a strategy should be tasked with drafting and delivering preliminary recommendations to allow city officials to gain insight on the market, before implementation.

Indigenous Community Considerations

Creating a bespoke events and festival strategy is a prime opportunity to incorporate Indigenous community representation and address their unique needs. During roundtable discussions, it was expressed that those from Indigenous communities encounter more red tape in regards to obtaining permits for local parks and other music spaces, thus limiting their opportunities to celebrate their culture and further contribute to the social value of Victoria. Local parks are particularly difficult to obtain permissions for events, despite the fact that many of these parks, such as Beacon Hill Park, are traditional lands for First Nations people. Making these spaces more accessible to First Nations communities would affirm Victoria's commitment to reconciliation and the celebration of cultural heritage.

Why Is It Important?

Festivals contribute significantly to the social and cultural value of a city. The economic outputs of festivals and large-scale events have the ability to re-invent a city and redefine the perspectives of an international audience. Audience engagement, enhanced music reputation and tourism are some of the components that contribute to the value of festivals. However, according to survey results, 40% of the festivals claim they don't work with Tourism Victoria or

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Destination BC for their festival. This presents a gap in the music ecosystem and uncovers an opportunity to create a strategy and harness partnerships in the local sector. It should also be noted that our survey analysis found that most of the festivals in Victoria have an attendance either between 1,000 to 5,000 people (40% of the festivals) or less than 1,000 people (another 40% of the festivals). Although this is impressive when competing events are scheduled, audiences are less likely to attend numerous festivals due to ticket prices or allocation of time. These numbers could experience significant growth with the creation of an events strategy.

Crisis Relief Measures

For those who love music, events and festivals are more than a concert, they are communal celebrations. When a crisis like COVID-19 suddenly emerges, musicians as much as audiences are no longer able to engage in such communities. However, this does not mean the community no longer exists. Musicians understand that a connection with their fans is of the utmost importance, while audiences are enthralled when they are able to engage with the musicians they admire. This is no different during times of crisis. Even when there are limited options, a music community will always find a way to build a connection and stay resilient. Included below is one example of how artists and their fans are finding creative ways to participate in a music community.

Groupmuse Intimate House Concerts⁴⁴ - Worldwide

Initiated by: The Intimate House Concert Program is hosted by Groupmuse, an initiative dedicated to creating meaningful connections within the music community, performing a wide-range of classic music through their online platforms and smartphone applications. The live streams are also posted on YouTube and are accessible through ZOOM. The performances are hosted in intimate spaces, such as living rooms, and in some cases will create battles between different orchestras.

Relief Initiative: Groupmuse is currently hosting events, in conjunction with a relief fund totalling \$24,000 (USD), that allow audiences to act as if they are at a live show. To do so, a pre-performance virtual session is held where audiences will have a chance to speak with one another and become familiar with those “sitting in the seats next to them”. Throughout the show, breakout sessions are held with the musicians and audiences, allowing for deeper interactions and a more personalized experience. Audiences' microphones also remain turned on during the show, and they are encouraged to clap and cheer as if they were in a crowd at a concert. In many ways, this feels like a live show because it virtually is.

What Can Be Learned? Music audiences around the world are just as eager as

⁴⁴ Group Muse (2020)

musicians to be part of a live music show or experience. With many people seeking entertainment, and an abundance of artists turning to virtual concerts, we are being reminded that feeling connected is essential to our quality of life. People want to feel connected, no matter what side of the world or screen they are on. The Groupmuse stream is unique in that it allows for audience interaction, breakout sessions and discussions. These are the moments that audiences crave and the feeling that inspires musicians. Playing livestream music is incredibly valuable, but personal interaction and connectivity are invaluable.

Play Tulsa Music⁴⁵ - Oklahoma, US

Initiated by: This recovery program, organized and executed by the Tulsa Office of Film, Music, Arts & Culture, aims to help small businesses and music entrepreneurs increase their business by providing safe opportunities for local musicians of all genres to resume live performances. The proposal, passed by County Commissioners in summer 2020, is one outcome of Tulsa County's CARES Act funding. It maintains a budget of \$325,000 for venues that meet certain criteria of operation (such as being at or below 1,000 capacity, meeting the Tulsa Health Department's safe reopening requirements, paying 50% of fees to musicians and requiring 1099s from musicians).⁴⁶ Funding requests must be submitted by Tulsa county venues themselves, and they must be registered in the Tulsa Creative Database, a directory of creative professionals and resources for them to use. The resulting live performance may be a collaboration between partners such as local organization, promoters, etc. but must utilize local musicians.

Relief Initiative: Play Tulsa Music provided funds to 24 venues, directly supporting 700 live performances. It was often put towards offsetting the costs of hiring support crew such as engineers and, of course, the musicians themselves.⁴⁷ There are a few programs around the city which are known to have received support from the initiative, including Fire Fridays at local venue the Mercury Lounge, which began as a promotional evening supporting an upcoming documentary *Fire in Little Africa* as well as its accompanying album.⁴⁸ There is also a weekly concert series held at Mother Road Market which is supported through the fund.⁴⁹

⁴⁵ Play Tulsa Music (2020)

⁴⁶ Play Tulsa Music (2020)

⁴⁷ Plummer (2021)

⁴⁸ Trammel (2020)

⁴⁹ Mother Road Market (2020)

What Can Be Learned? While traditional live music performances are not currently feasible, adjustments can be made during recovery to provide local artists with opportunities on a smaller scale. Ongoing support such as this will help ensure the live industry is able to bounce back more quickly, generating business for local venues and allowing artists to maintain a traditional pathway to connection with their audiences.

7.5 ARTIST AND MUSIC INDUSTRY DEVELOPMENT

As the music market continues to change, artists and industry actors must have the ability to do the same. In some cases, this means increased exposure opportunities, higher quality education and enhanced resources. A music industry must be able to grow as quickly as, if not faster than, most other industries, given the competitiveness and digitalisation in the sector. Whether it's tools for establishing an online presence or a platform to garner audience participation in live events, being proactive and planning strategically are essential. Though many programs already offer development opportunities in Victoria, there is still room for growth, as always.

Action 14: Support the Marketing and Promotion of Music and Arts

When to implement: 12-16 Months

COVID-19 timeline impact: Can be done during recovery

The city should devise a scheme that offers discounted or subsidized public marketing locations for music, culture and art-related events. This includes the Victoria airport, harbour, transit services and other areas of high population density. No matter how large or small, efforts to support music-centred activities can add value to the overall music ecosystem. Offering reduced and subsidized marketing channels to arts organizations is a simple yet exemplary way to demonstrate care and commitment to improving the creative industry and should be considered moving forward.

Initial conversations should take place between arts and music representatives, alongside advertising agencies and signage policy-makers. Programs should be put into place detailing the rotation of campaigns to ensure equitable opportunities, while a mapping process should be conducted to outline which areas are suitable for the program. A quick oversight of used promotional space may serve as a primary location to test or trial the program. The Victoria Arts Council and Victoria Music Advisory Committee should work together with the Victoria City Council, the Victoria Regional Transit System, Victoria International Airport, Greater Victoria Harbour Authority and Lamar Advertising to begin devising a scheme to support the promotion of local musicians. Doing so will improve audience participation, enhance the economic outputs of the music sector and further solidify that Victoria is a music city.

Indigenous Community Considerations

One of the challenges highlighted during roundtable discussions was that Indigenous artists and musical performers are rarely featured as a headlining act or the primary form of art. While they are typically booked to open ceremonies and events, they are seldom offered a chance to maintain this presence unless performing at an Indigenous-focused event. Indigenous artists have expressed frustration in the past with feeling 'tokenized' by being invited to shows to fill a quota, and would like to be considered alongside more traditionally

mainstream artists in later time slots and on the main stages of events.⁵⁰ Indigenous communities and traditional music must be marketed alongside artists of other genres and backgrounds in order to promote equality in music tourism interests and audience development, highlighting that Victoria's music heritage is just as important to its local music industry as are its commercial and independent artists.

Why Is It Important?

Signage and outdoor posting are heavily regulated throughout the city, limiting the potential to reach audiences and engage fans in music-centred events through primary channels such as billboards. Although there are clear guidelines on signposting zones provided on the local government website, these regulations can cause the price of promotional spaces to increase, creating financial burdens to smaller organizations (even more so when considering the competition that exists for prime marketing spaces). For those surveyed, signage was among the top five methods in which audiences found out about arts-related events (39%). Currently, Victoria is aiming to position music and arts as a leading driver in its local economy. However, without the proper exposure of events to locals and visitors, audiences will be less likely to engage or participate in music-led concerts or performances.

Best Practice Case Study - Transit Shelter Arts Promotion Program⁵¹ - Vancouver, Canada

What Is It: The Transit Shelter Arts Program is used in Vancouver and allows non-for-profit arts organizations to promote their business at a low cost. The spaces available are in population-dense areas or high-traffic locations, optimizing the promotional efforts and engaging the broader music and culture audiences. Promotion and marketing are available in four-month increments and can be applied for online.

Who Is Responsible: The City of Vancouver

What Has it Done: Although there are no direct measurements to gauge the success of the program, the focus of this program, which is to raise awareness of arts, cultural programs and charitable events, has given several music organizations the opportunity to promote their events.

Relevance: If a city wants to yield the positive impact of music and culture, it must also be willing to develop and broadcast the industry at every opportunity. Victoria should consider implementing a similar program for all music promoters to inform

⁵⁰ APTN and NVision Insight (2019) "National Indigenous Music Impact Study". Online at <https://www.aptnnews.ca/wp-content/uploads/2019/11/Music-Impact-Study.pdf> accessed 17-3-2021

⁵¹ City of Vancouver (2020)

local audiences, but to also raise musical awareness to those visiting the city. This will also enhance Victoria's reputation as a 'place of music'.

Action 15: Promote Music Networking and Supports

When to implement: 12-24 Months⁵²

COVID-19 timeline impact: Can be done digitally during recovery for post-recovery in-person implementation

To support local music entrepreneurs, Victoria should work to develop a music community network that offers training programs and routine meet-ups of music professionals, enticing artists to collaborate. Doing so creates more diverse opportunities for musicians while also bringing the broader music ecosystem closer together. Cross-genre partnerships and musical outputs are also likely outcomes pending the involvement of the music community.

As the local industry continues to grow, more resources will become available and more insight will be gained. It should be noted that networking events should be complemented with workshops and masterclasses. These should be readily available to all talent levels and genres. Inclusivity is essential. To establish such a network, Victoria BDC Business Centre, Your Entrepreneurial Society (YES Victoria), and the Island Music Association are just some examples of where partnerships should be harnessed. Victoria should tap into its breadth of established artists to host such programs. If so, artists will be offered information and training that is modernized as well as practical. More importantly, it will be from lived experience, given the expertise of the artists who organize the networks.

The launch of a music network can be as simplistic as a routine jam session with mini-workshops or a simple instructional meet-up detailing how to apply for grants. The overarching point is to bring artists together so they can share their knowledge. As the network continues to grow, special considerations should be made in regards to: organizing a survey and communication channel with the broader community of interest and identifying potential outlets or networking platforms; organizing mini-events and in-event workshops that directly support the music community; promoting membership options; or conducting routine assessments of networks and evolving program delivery.

Indigenous Community Considerations

Indigenous artists expressed, during our roundtable discussions, that they have limited access to artists, performers and professionals across all sectors of the creative industries. Not only does this hinder cross-sector collaboration, but it also prevents said Indigenous artists from progressing their own professional careers due to a lack of resources. This imbalance can be

⁵² Based on The United Way's Program Design & Development Resources, supported by case studies.

caused by a lack of clear communication channels between music communities and related creative communities or by a lack of infrastructure to support such activity. Creating purpose-built networking events to increase communication and collaboration opportunities for Indigenous artists and professionals can help shrink this gap and create more equity across the music industry.

Why Is It Important?

Musicians and artists understand that they are entrepreneurs by trade and, in most cases, follow a similar process to those who are ‘launching a new business’. Every time an artist releases a new single or album, they must brand and market it the same way a business owner brands their company or products, all of which is dependent on networking and connection. However, more often than not, musicians are not offered the same support as a local business entrepreneur. Musicians need a network to grow, develop and sustain their careers. Victorian artists are no different. 43% of artists surveyed highlighted the importance of maintaining national and international contacts. Similarly, when asked ‘How important is it for you to collaborate and network more with other musicians and the music industry in Victoria’, music professionals averaged a score of 4.1 on a 5-point scale.

Action 16: Organize Routine Diversity-Centred Music Workshops that Explore Skills and/or Cultural Relevance

When to implement: 12-24 Months⁵³

COVID-19 timeline impact: Can be prepared during recovery for post-recovery implementation

As a musician develops in their craft, they will begin to seek out new opportunities that help enrich their talents and extend their professional knowledge. This is true for all artists, but artists who identify as part of marginalized communities tend to have fewer opportunities to connect, learn and grow alongside other practitioners. Even more so, the chance to connect with other cultural practices and communities begins to diminish. To ensure artists’ needs are being met across the entire music industry, workshops that support diverse artists, help hone new skills and provide a chance to learn of other cultures are invaluable. For this reason, workshops should be offered that support marginalized and multicultural communities, whether they identify as Indigenous, Middle-Eastern, LGBTQ, or any other marginalized group.

These workshops can be held in remote or commonplace spaces and could explore a variety of genres or cultures. They could focus on music business related topics like copyright, grants and funding, or marketing, as well as instruments, songwriting, recording and/or singing, with a variety of opportunities offered interchangeably. To an extent, this opens up an opportunity for more established artists to come together with emerging artists and provide a mentor-style

⁵³ Based on The United Way’s Program Design & Development Resources, supported by case studies, yet could be coupled together with Action 15.

workshop. Partnerships, cultural understanding and a more robust overarching music ecosystem can result from such practices and should be considered moving forward.

The roundtable discussions also uncovered that when diversity-centred workshops were in fact held, they yielded positive results and led to strong partnerships and a greater understanding of diverse music practices. They also encouraged artists to grow their skills locally. Inevitably, when artists do not feel like they are able to grow in their own city, they can and will begin to seek support in other music ecosystems. Long term, this drains local talent, diminishes youth retention and does not allow a city to properly demonstrate their music heritage or inspire student and music tourism.

Why Is It Important?

Artists are constantly seeking ways to expand their skills, regardless of talent level or musical interests. As such, when these opportunities are limited, artists inherently develop a disconnect with their music community. This is especially true for artists who may already perceive their options as scarce. Our interview and roundtable processes uncovered that diverse-centred artists have already formed this perspective and feel as though their music network and community is not effectively supporting their needs. As an extension of this, musicians are not able to develop their immediate music-circle, build their skills or access the infrastructures they need to sustain their music careers.

Action 17: Host and Participate in Global Music Networks

When to implement: 6-12 Months⁵⁴

COVID-19 timeline impact: Can be done digitally during recovery

Victoria is already demonstrating exemplary practices in relation to music therapy programs. The City of Victoria should recognize the opportunity presented to them and further expand these sectors by offering to host or establish fairs and/or that celebrate new-developments and advancement in music therapy. Advocates from around the world already participate in similar events, with the support of leading technology companies such as Microsoft and Spotify. The results of such events are monumental, whether it is increased music-student tourism, enhanced economic output via music subsectors, greater reputation as a 'music place' or stronger inter-city relationships. Within Canada, music therapy is a relatively recent area of interest. As such, Victoria's already progressive approach in music would bring validity to their request or desire to host and/or establish a music therapy conference. Currently, only four provinces in Canada are certified to offer music-therapy courses by the Canadian Association of Music Therapy (CAMT). British Columbia is listed as a participating province. It should be noted that the CAMT may serve as a potential partnering organization, being that they already develop and organize music therapy conferences.

⁵⁴ This timeline is in reference to the NIRSA Conference Planning timeline template. It should be recognized, however, that some events require longer planning, depending on desired outcomes.

Without question, worldwide partnerships will become important in establishing successful events. Educational institutions such as the University of Victoria, Camosun College and the Victoria Conservatory of Music should be actively involved. In addition, entities such as Island Health, FACTOR, the Government of Canada, UNESCO, Music Cities Network and SXSW must be able to establish working relationships. Attracting existing fairs to Victoria is predicated on the international networks that the city develops and maintains. Given the stature of Victoria's tourism industry, the city could leverage its natural attractions and robust music offerings as a primary source of inspiration.

Why Is It Important?

One of the most progressive areas in the music industry is music therapy. Both of these fields are well-positioned in Victoria. Currently, very few Canadian cities are as progressive in their honing of these particular vocations, which presents an opportunity for Victoria to lead as a driving force in each of these areas. As music continues to grow, cities and champions of the industry must be able to grow with it. Those who participate in music networks around the world remain keen to explore the values and innovations that music curates. Victoria can facilitate such opportunities, pending the willingness to leverage their educational institutions as well as their practicing professionals.

Best Practice Case Study - Music Cities Network⁵⁵ - Worldwide

What Is It: Music Cities Network (MCN) is an international public/private network dedicated to improving communication and cooperation, sharing research and knowledge, exploring policy and advocacy and networking for policy-makers, city leaders and all other music city partners. Its founding members were the cities of Aarhus, Hamburg and Sydney, with Bergen, Berlin, Groningen, Manchester, Nantes and Reykjavík joining between 2017 and 2019.⁵⁶

Who Is Responsible: The network was initiated by Sound Diplomacy and the Hamburg Music Business Association, with the member cities sharing 'hosting' responsibilities on a rotating principle.

What Has It Done: MCN is focused on the following four objectives:

- Improving cities and their local music scenes through music policies and collaborative projects
- Building greater networks and creating an actionable agenda for change
- Providing and sharing a one-stop repository of information and research surrounding global music cities activities & policies

⁵⁵ Music Cities Network (2020a)

⁵⁶ Music Cities Network (2020b)

- Curating a music player exchange/collaboration (business, artists, cultural institutions and education)

In 2018 and 2019, the network launched two residency programs: one for artists and another one for young music business professionals. Both programs connect participants directly with each other by using the member cities as a gateway and utilizing their existing structures, knowledge and hubs.

Relevance: The Music Cities Network represents a platform used to bring the global music community together. It is essential that a music city participate and stay informed with the international functions of other music ecosystems - regulatory changes, advancements and initiatives. Victoria does have the capacity to draw in music-actors, and as such, should use the Music Cities Network as a guide on how to connect with future partners.

Crisis Relief Measures

The music industry is constantly undergoing change. With global markets becoming easier to access and streaming platforms connecting listeners around the world, advancements in the music industry are sudden, requiring music industry actors to be adaptable and resilient. When a crisis occurs, these two skills are absolutely essential in providing sustainability and longevity to the career of local artists. As such, there are two case studies below which represent some of the ways music communities are working to keep their local music sector healthy and well-supported while offering a chance to maintain a sense of normalcy throughout recovery.

Music Minds Matter⁵⁷ - UK

Initiated by: With over 95 years of experience, Music Minds Matter (MMM) has become a leader in the United Kingdom for its support in musicians' mental health and well-being. Access to their programs is completely free regardless if you're on tour or in your own home. Simply put, MMM cares only for music empowerment and advocacy.

Relief Initiative: The MMM offers three different kinds of support: Cognitive Behavioural Therapy (CBT), telephone counselling and face-to-face counselling. They are available every day of the year and are open to any individual who may need assistance - including matters outside the scope of music. Counsellors at MMM

⁵⁷ Music Minds (2020)

are trained professionals, with counselling sessions starting within a week of the first phone call.

What Can Be Learned? Mental wellness affects all of us. It is crucial to understand that we don't have to wait until there is a crisis to organize support resources, and we don't all have to be in a crisis for one person to feel like they are in one themselves. During times of a pandemic, mental health issues can become life-threatening. Mental wellness issues are prevalent regardless if there is a global crisis or not, but many artists and musicians find themselves suddenly unable to work once shutdowns occur, intensifying mental health concerns. It is also important to consider the needs of Indigenous communities, who have been calling for increased access to mental health resources and often prefer a more holistic approach alongside traditional methods.⁵⁸ With mental health support available across British Columbia, musicians and artists must continue to have access to similar programming all-year-round, well after a pandemic or crisis has concluded. Doing so creates a safer and more enlightening experience for everyone involved in the sector.

⁵⁸ Indigenous Services Canada (2020) "Government of Canada is responding to immediate Indigenous mental wellness demands during the COVID-19 pandemic". Online at <https://www.newswire.ca/news-releases/government-of-canada-is-responding-to-immediate-indigenous-mental-wellness-demands-during-the-covid-19-pandemic-855720278.html> accessed 4.3.2021

7.6 SPACES AND PLACES

Music spaces are much more than a source of entertainment. They stand as a platform for artists and musicians to build a network, test their products and hone their skill sets. A music venue or space presents an opportunity to build a connection between audiences and performers. They are about community, and they are not always conventional. There are endless ways to turn any space into a musical attraction. Victoria has already identified this, which is evident in the support for busking programs and festivals.

Action 18: Activate Dormant Spaces through Music

When to implement: 6-12 Months

COVID-19 timeline impact: Can be prepared during recovery for post-recovery implementation

Victoria has a unique opportunity to enhance some of the most crucial components of their music ecosystem, primarily through access to music venues and spaces, audience engagement and increased performance opportunities for artists. Utilizing permits to host music events and rehearsals offers a cost-effective means of supporting the music community both as fans and practicing professionals. At the same time, permitting processes and requirements for the use of open spaces like parks for music events could be eased. The use of dormant and open spaces through permitting will require careful consideration from local government, ensuring safety protocols are being followed. However, the music community must take the lead in establishing routine events and hubs for musicians to thrive in. Zoning and planning will be influential factors with this action area. When moving forward with this initiative, it will be invaluable to maintain intelligence on where it is acceptable to host events and where it is not. As such, initiating the first steps will not be as simple as applying for permits. Rather, it will require careful planning and collaboration amongst music ecosystem actors and government representatives. A “Fair Pay” requirement should be applicable to permitting of these spaces.

This will ensure longevity of the initiative and will allow it to stay within the bylaws outlined by the City of Victoria. Overall, this will enhance the social and cultural value of Victoria, while also adding to the vibrancy of the city in a unique manner. Once activated, there are no limitations to how these spaces can be used, regardless of if it is a cultural celebration or an album release party.

Indigenous Community Considerations

A 2019 study into the impact and needs of Indigenous artists showed that they want more professional stage opportunities, be it through existing events or by activating Indigenous-specific spaces in which to present their art.⁵⁹ Our own roundtable discussions showed that an increased and, often, overzealous transition towards ‘corporate-style’ venues

⁵⁹ APTN and NVision Insight (2019) “National Indigenous Music Impact Study”. Online at <https://www.aptnnews.ca/wp-content/uploads/2019/11/Music-Impact-Study.pdf> accessed 17-3-2021

and spaces is particularly detrimental to Indigenous events and interests. Many felt that venues tend to be focused more on business growth than fostering arts, culture and heritage, which makes it difficult to obtain permits or authorization and creates an unbalanced ecosystem in which venues are not as accessible to minority or underfunded communities. Expanding venue options by activating dormant or underutilized spaces creates an opportunity to increase accessibility and cater uses to the needs of Indigenous communities.

Why Is It Important?

Throughout the roundtable discussions, survey process and personal interviews, access to spaces and minimized costs to rent facilities became a primary topic of debate. Within the survey, industry workers (69%) and artists (63%) identified access to public spaces for music events in the top three areas where more support is needed. In addition, industry workers and artists also selected more affordable music spaces in their top priority areas, at 73% and 55%, respectively. Victoria's arts and culture scene is well known for its vibrancy and attractiveness, but the need to access performance spaces must be resolved, as maintaining the upbeat nature of a music city requires the activation of all music assets.

On the other hand, "Fair Pay" requirements to ensure artists are paid fairly for their work are necessary to protect musicians and allow them to be able to live out of their work and not have side jobs. These requirements should be extensive to all music events in Victoria, particularly those that are paid or funded with government help. Testing them as part of the permitting process for the use of these spaces is a good start to extend it to the rest of events in due time.

Best Practice Case Study - Creative Spaces⁶⁰ - Vienna, Austria

What Is It: Kreative Räume Wien ('Creative Spaces') is the City's agency for 'activating vacant spaces'. It acts as an intermediary by connecting relevant City departments with potential users of vacant spaces and the real estate owners, as well as providing any additional legal advisory services required. Spaces are used for a variety of purposes and timeframes, including exhibition spaces, offices, performance spaces and artist workshops, which are determined in advance during the mediation of the City with the interested lessee and lessor.

Who is Responsible: It is managed directly by the City of Vienna and three other agents: a representative of the cultural industries, a representative of the real estate industry and a legal advisory company.

What Has it Done? The consortium has developed over 400 unused space activations since 1999 and signed cooperation agreements with over 100 different owners and real

⁶⁰ Kreative Räumen Wien (2018)

estate companies.⁶¹

Relevance: Victoria can use the Creative Spaces initiative as a model for curating entertainment spaces throughout the city, maximizing unused and dormant facilities. Victoria's rich arts and culture would complement such a program, making music much more accessible and further integrating into Victoria's identity. The structures to support such initiatives already exist in the city, while artists have already called for access to spaces. Activating such programs will certainly satisfy the vast majority of the music community.

Action 19: Create Indigenous and MultiCultural-Centred Creative Spaces

When to implement: 12-18 Months

COVID-19 timeline impact: Can be prepared during recovery for post-recovery implementation

Throughout our stakeholder engagement and roundtable discussions, participants consistently made references to a lack of spaces that present safe, welcoming environments for Indigenous and culturally diverse artists. Reasons for such spaces included a need to recognize and acknowledge the cultural differences amongst musicians within the city of Victoria, while also developing a stronger community of multicultural artists. It should be noted that this is not specific to religious or cultural centres; rather, this includes venues, studios and creative spaces that nurture and showcase various cultural artists. To do this, spaces should be made available in easily accessible places, perhaps in more central communities with significant transit access. As an extension, and due in part to the wide array of diverse artists that live outside the city's core, such spaces could also be made available in the city's outer quadrants. From a historical perspective, one single space is insufficient to accommodate or unify all communities in the city. Thus, numerous spaces are needed throughout the city.

Why Is It Important?

Diversity-centred spaces will improve artists' visibility, enhance connections amongst cultural artists and facilitate partnerships amongst different communities. More importantly, it will ensure that artists can access safe, welcoming spaces that maintain a keen sense of cultural sensitivities and practices. If harnessed, these spaces will become hubs for music activity, providing the infrastructures needed to sustain musicians and artists' careers. In contrast, if such spaces cease to exist, connections between artists and cultural groups will diminish. According to stakeholders and roundtable participants, the lack of such spaces is already creating a barrier between music communities. Mainly, artists do not feel that the current

⁶¹ Magistrat der Stadt Wien (2018)

spaces (venues, studios, etc) are welcoming or supportive of multicultural groups' needs. As a result, artists reject opportunities to engage with the broader music community, which limits their interactions with their own community and potential network outreach.

Best Practice Case Study - The Indigenous Creative Spaces Project⁶² (Ontario, Canada) and First Nations House (Fortitude Valley, Australia)⁶³

What Is It: ArtsBuild Ontario's Indigenous Creative Space Project provides spaces for Indigenous art and creativity, with a focus on developing numerous spaces across the province. The program was recently announced and intends to pursue the development of new spaces and venues in the coming year. The First Nations House in Australia provides similar support, but with an online platform as their base. The launch was facilitated by the BigSound event, which showcases First Nations artists on numerous online platforms in various cities. A venue was recently selected to become the host for the first in-person creative space moving forward.

Who Is Responsible: The Indigenous Creatives Spaces Project was initiated by an Indigenous Advisory Circle, Co-Conveners and ArtsBuild Ontario.

The First Nations House is supported and driven by Spotify, BigSound Events and, more recently, by Indigenous Music West at Manitoba Music.

What Has It Done: Both initiatives enhance exposure to Indigenous arts while maintaining and adhering to the traditional values of the subsequent populations. More importantly, they maintain a keen sense of awareness for the practices that are honed by each Indigenous community. In their own unique ways, both platforms also increase the sustainability of Indigenous arts, encouraging collaboration and international partnerships as a means of promoting and appreciating Indigenous art.

Relevance: Equal access is a vital component in an equitable, representative music ecosystem. Yet, diverse-centered artists in Victoria recognize that there is an imbalance in their ability to access music spaces, primarily spaces that value their cultural differences. Victoria now has an opportunity to leverage or replicate the initiatives found above as a means of increasing access not just for Indigenous artists, but also for multicultural artists as a whole. Having said that, these spaces should be numerous and should not become exclusive to just one or two groups. In contrast, these spaces should focus on perpetuating cultural cohesion, valuing tradition and promoting all of its artists. Virtual spaces, like BigSounds' collaboration with Spotify, also demonstrate how equitable opportunity can lead to a global reach and enhanced audience engagement.

⁶² ArtsBuild Ontario 2020

⁶³ Big Sound 2020

Crisis Relief Measures

When a crisis ensues, it is quite difficult to pinpoint who is the most vulnerable to closures and shutdowns. The emergence of COVID-19 reminded us all that livelihoods can change in mere moments, and resiliency is dependent on sustainability and adaptability. Without our venues and facilities, a major gap is created in a music ecosystem. Their existence is invaluable. As a point of reference, there is an example below that demonstrates the different ways a city can support its music spaces, whether predictable or unconventional, during times of crisis.

United We Stream⁶⁴ - Berlin, Germany

Initiated by: United We Stream was a collaboration initiated by the Berlin Club Commission, Reclaim Club Culture and Berlin Worx, all of which are key players in the promotion and development of music across Berlin's music ecosystem. This streaming initiative is also supported by a wide range of streaming partners, local radio, the Berlin Club Commission and SoundCloud.

Relief Initiative: To combat the country-wide shutdown of local music venues, United We Stream is working to keep clubs and venues active and engaged with local audiences and musicians within Berlin's music industry. The streams offer live platforms of Berlin's clubs and artists and dedicates one channel to broadcast the entirety of Berlin's club scene. In addition to the inside look at the local clubs to accompany their streamed performances, there is another channel with DJ sets, live music and performances, some of which include a platform for discussion groups, lectures and films on club culture topics. Merchandise and products are sold throughout the streams, while donations are welcomed. All proceeds go towards supporting music venues, clubs and bars through times of quarantine. Since its inception, the project has expanded into 117 cities around the world and involved 2353 artists across 483 locations. All artists and satellite websites for city organizers are updated and linked on the United We Stream hub website.⁶⁵

What Can Be Learned? Unity is invaluable, especially within a music ecosystem. It is critical that the music sectors in each city, state or province recognize that they are working for each other, not against. When that is understood, powerful shifts can begin to take place. The differences between European and North American infrastructures are quite evident. However, the concept of collaboration and unity, especially in times of crisis, is universal. Music venues drive a music scene. The longevity of music spaces is imperative to a city, and they should be treated as such.

⁶⁴ United We Stream (2020)

⁶⁵ Ibid.

Every dollar contributed to the music industry is invaluable. United We Stream is more than a streaming platform; it is a complete unification of a music ecosystem. The simplistic nature of such an initiative is easily replicable, but also adds significant value as music audiences, performers and enthusiasts are still offered a place to celebrate music and connect.

7.7 TOURISM AND MUSIC CITY BRANDING

Music tourism is one of the strongest tools a music ecosystem has to offer. In order to work, both sectors must identify themselves as a unit rather than individual entities. From annual festivals to week-long cultural events, there is always a massive draw to cities that position music at the forefront of their offerings. Victoria is quite familiar with mass tourism and international appeal, given the uniqueness of its nature and location, as well as its creative industries. It is important that Victoria capitalizes on these unique advantages, establishing a positive international reputation for entertainment and culture.

Action 20: Integrate Music into Tourism

When to implement: 16- 24 months

COVID-19 timeline impact: Can be prepared during recovery for post-recovery implementation

Music must be positioned as a key component to civic living in Victoria, should the city want to reap the benefits of music tourism and a thriving music ecosystem. Doing so means the city will need to integrate music into all tourism marketing channels, as well as create strategic plans to successfully highlight its local industry. Marketing channels include an online presence, airports and harbour hotspots, but these could be extended into entertainment district postings, hospitality websites and night-life coalitions. Information regarding music activity should easily be accessible not just for tourists, but also for locals. Organizing a music brand requires a city to define its music identity, connecting with cultural hubs and entertainment districts and prioritizing local musicians. The Victoria City Council, the Greater Victoria Harbour Authority, the Victoria International Airport, the Victoria Music Advisory Committee, the Victoria Bar Association and the Victoria Hotel Destination Marketing Association will become integral to the success of creating and promoting a music city brand. As a result, tourism for both students and entertainment seekers will increase, while Victoria will enhance its international reputation as a music destination. Fully integrating a music city brand into local tourism initiatives will help to inspire the creation of a music city tourism strategy.

The successful integration of music into local tourism offerings will require a clear definition of

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the roles and responsibilities of stakeholders. It should be recognized that the entire music ecosystem will need to be involved in creating a successful music tourism brand. Every music actor must be engaged in the process, whether it is the artists providing a specialized music playlist for in-flight entertainment or marketing efforts on the inner-harbour, tourism branding is a portrayal of a city's identity. As such, the brand should then prioritize Victoria's own unique musical identity. Furthermore, it is important that those who champion this initiative have a comprehensive understanding of how tourists and visitors perceive Victoria as a whole. To do so, surveying and analyzing branding campaigns will be necessary.

Why Is It Important?

The inclusion of music and entertainment within tourism initiatives is essential to developing a successful music city. While there are elements of music promotion throughout the primary tourism channels in Victoria, it is particularly hard to locate music events, pinpoint the musical identity of the city and understand its musical heritage without delving deeper into websites. As mentioned, when assessing the relationship between music, events and tourism hosts, the survey identified that less than 40% of festival hosts have ever worked alongside tourism programs and initiatives. Only 20% of industry workers who took part in the survey claim to work with tourism channels at the moment. A well-devised music brand encompasses partnerships with all music ecosystem actors and is designed to be inclusive and diversified. Furthermore, if Victoria wants to be perceived and recognized as a music city, the musical identity and brand should be evidently promoted across all channels. Doing so also requires complete cohesion with all music actors, from musicians to city councils, tourism actors and cultural leaders.

Best Practice Case Study - Aarhus Music Tourism⁶⁶ - Aarhus, Denmark

What Is It? The CVB Visit Aarhus has multiple directories for showcasing the live music in the city, such as Music on Stages and Free Experiences, and it hosts other pages promoting local music festivals. This was done in partnership with PROMUS⁶⁷ (Production centre for music, film, stage, literature, arts, dance, etc.) who lead Aarhus Events, a city event office. It is also planning a 'Year of Music' in 2022.

Who Is Responsible? This is a unique collaboration between the regional government and the music industry.

What Has It Done? From these intentional partnerships and promotions, the city expects to see a 25% increase in cultural tourism by 2020.

Relevance: Music tourism is a critical component in a highly-functional music city. The benefits of a strong music-centric tourism offering are invaluable, as it increases economic output from the entire music ecosystem as a whole while contributing

⁶⁶ Visit Denmark (2020)

⁶⁷ Promus (2015)

substantially to the reputation and social value of a city. Victoria's tourism channels must be able to prioritize music and entertainment, not just as a motivator for travel, but as a fundamental piece of the entire city's functions.

Action 21: Create a Busking Program in Airport Terminals

When to implement: 6 - 12 Months⁶⁸

COVID-19 timeline impact: Can be prepared during recovery for post-recovery implementation

Airports, much like the inner harbour, stand as a 'first impression' of a city. As a developing music city, Victoria can utilize airport busking programs to solidify to guests that music is ingrained into their civic fibre. Programs used at airports can vary from using a roster of rotating artists to creating 'busking residencies' in designated areas. This should be done strategically to offset any issues related to walk-way blockages or an impedance on the flow of foot-traffic. Given the dedicated support for buskers within Victoria, there are already existent relationships between city governments and local music communities. These relationships should be further strengthened, with a particular focus on Victoria International Airport, the Downtown Victoria Business Association, the Victoria City Council and the Victoria Music Advisory Committee.

While designing this program, it is critical to assess the best-suited locations for busking in the airport, as there will need to be a clearly defined program in place. It is important that those who take on the role of program coordinator have an understanding of tourism and airport operations while also having a pulse on the list of local talent. Doing so will bring clarity to the logistics of the program. Information regarding peak traffic times and non-disruptive locations will also need to be maintained and monitored. Visitor satisfaction reviews and surveys can be used to help identify the success of the program. It is recommended that this program is launched with a trial period, maintaining only one or two performances. This slow rollout will allow for direct oversight on the program operations, with resolution and further integration as the primary driver.

Indigenous Community Considerations

As with any expansion of performance opportunities, equal and equitable access is key. Indigenous artists must be highlighted throughout the airport. This will give them access to an international audience in a setting that puts their music at the forefront of traveler's minds as they enter and leave the area. This can be achieved through an Indigenous artist quota, but representatives must also actively reach out to Indigenous artists or community leaders to

⁶⁸ Based on The City of Calgary, where a pilot program was assessed and effectively implemented after nearly a year of identifying busking locations and restrictions. Source: Global News (2016)

communicate the availability of the opportunity.

Why Is It Important?

The busking practices in Victoria are already exemplary, given the support of The Downtown Victoria Business Association alongside the Downtown Victoria Buskers Festival. Guidelines surrounding the inner harbour and busking allow visitors and tourists to experience the music-rich identity that exists within Victoria. In contrast to this, roundtable discussions and personalized interviews uncovered that there is still a “sleepy image” surrounding the local music and culture scene. This indicates that more can be done, on a ground level, to engage audiences, increase performance opportunities and display the talent that exists within the city. Undoubtedly, artists are always keen to gain exposure. Busking does provide such opportunities, as airports and terminals allow for exposure to international audiences while improving the perceptions of Victoria’s music ecosystem.

Best Practice Case Study - Calgary Airport YYC Music⁶⁹ - Calgary, Canada

What Is It: The YYC Music Program allows artists and musicians to perform at terminals throughout the airport as a means of improving the guest experience and promoting local music. The program cycles through a roster of artists and books 150 slots per month, using designated spots in the international and national terminals to increase artist exposure and contribute to the social and cultural value within the city.

Who Is Responsible: The Calgary Airport Authority, Calgary Folk Fest, Calgary International Blues Festival and the Honens International Piano Competition

What Has It Done: The airport has received a number of positive responses from passengers and locals and has also inspired a YYC Playlist that promotes songs performed by the local musicians.

Relevance: Victoria has already placed music at the forefront of their ferry transportation terminals. However, those who arrive via air-travel do not enjoy the same musical experiences. It is important that music is positioned in as many channels as possible, given Victoria’s desire to engrain music into its civic fibre.

Action 22: Promote Victoria’s Music Identity and Heritage through an “Indigenous Spotlight Playlist”

When to implement: 6 - 12 Months

⁶⁹ YYC Airport (2019)

COVID-19 timeline impact: Can be done during recovery

A key component to a successful music city success includes how to harness a music community's local identity and heritage. This is true from a tourism perspective, as it becomes a key tool for promoting the city's civic life. However, it is also relevant to the expansion and promotion of local talent and artists. Without a doubt, Indigenous music has a monumental lineage in Victoria's music ecosystem. Storytelling, historical events and the evolution of musical expression and practices provide a few of many examples of how impactful Indigenous populations are in Victoria. To effectively honour the local music identity and effectively promote the raw, varied talents found in the local ecosystem, a playlist should be created to showcase Indigenous and multicultural artists within the city. This playlist can be utilized in tourism campaigns as well as to help connect locals to their own city's heritage. Platforms such as Spotify would serve as a key tool in establishing this playlist. The most vital component would be involving Indigenous populations in the curation process. This playlist must represent all talent levels and genre types and provide equitable exposure for all music ecosystem members. As a tool, this playlist serves the city's reputation, connects people to their own heritage and enhances local artists' opportunities, a three-fold benefit.

Why Is It Important?

Any city can indeed become a 'music city', simply because music exists almost everywhere globally. Whether in an elevator, walking through a mall or visiting an events centre, music is a constant in our lives. Yet, what truly separates successful music cities from many others is the importance of mastering their own identity. That is to say, celebrating and evolving what makes the city unique, and differentiating it from other cities in the world. New Orleans recognized their unique heritage and excellence in jazz music, utilizing this outlying feature to prompt their music potential. Similarly, Seattle became a hub for grunge music - a title they still harness to this day. In Victoria, this should also become the case, proudly proclaiming and promoting their unique heritage and backgrounds. In this case, Indigenous roots play a substantial role in developing the city's musical heritage and contributing to the development of its music industry. For this reason, Victoria must continue to showcase and demonstrate what makes them unique. Although many things make Victoria a highly sought-after, unique city, Indigenous music and culture are at the very foundation of how to start honing local music lineage.

Best Practice Case Study - Looking Out, Looking In Playlist - Melbourne, Australia ⁷⁰

What Is It: The Looking Out, Looking In playlist is curated to celebrate the musical and cultural achievements of Aboriginal and Torres Strait Islander peoples in Melbourne. The playlist is composed of storytelling and songs inspired by the local connections to the land and its history. Most importantly, it was created by more than

⁷⁰ Tom Parker (2020)

10 local Aboriginal artists of all talent levels and professional experiences. The launch of the most recent playlist took place during the National Aborigines and Islanders Day Observance Committee Week, (NAIDOC Week), which is a week dedicated to celebrating Aboriginal populations in the city.

Who Is Responsible: National Aborigines and Islanders Day Observance Committee, Kee'ahn, Soju Gang and DJ PGZ.

What Has It Done: The playlist has become increasingly popular and continues to promote Melbourne's local cultural identity. The most recent release comes as the sixth installment of this playlist series, demonstrating a commitment to highlighting Aboriginal populations' presence and history. In its entirety, this streaming series not only educates civic communities through song, but it also offers a source of connection for those looking to explore the lineage of music and culture in the city.

Relevance: Victoria can use the example of the Looking out, Looking In series to begin developing their own channel for promoting the heritage, history and cultural value of Indigenous peoples. It is important to note that Victoria is in a unique position to become a leader in Canada in this particular area, paving the way for other aspiring music cities to begin harnessing their musical heritage and effectively promote their artists. Given the range of talent found in the city, the playlist must be updated routinely, providing the most exposure and opportunity for all music community members. Victoria can better develop their partnerships with Indigenous artists and musicians by also ensuring that these populations are key contributors when devising each playlist, allowing for wide-spread, equitable exposure for various artists.

ACTION TIMELINE

We recognize that not all actions can be delivered at once. Some will require longer-term partnerships, external support and funding. However, some can also begin today. As such, we have separated the actions into three timelines. **Now** (1-12 months), **Soon** (12-24 months) and **Later** (24 - 48 months). As the actions that can be realized now are implemented, they will create a wider engagement base from which the actions marked as ‘soon’ and ‘later’ can be delivered.

NOW 1 - 12 MONTHS	SOON 12 - 24 MONTHS	LATER 24 MONTHS OR MORE
<p>Action 3: Initiate the Agent of Change Principle</p> <p>Action 10: Create a Database of Indigenous Music Education Resources to be Used with the Local Curriculum Guidelines</p> <p>Action 12: Consolidate All Music Events and Activity While Promoting Indigenous and Multicultural Artists</p> <p>Action 17: Host and Participate in Global Music Networks</p> <p>Action 18: Activate Dormant Spaces through Music</p> <p>Action 21: Create a Busking Program in Airport Terminals</p> <p>Action 22: Promote Victoria’s Music Identity and Heritage Through an “Indigenous Spotlight Playlist”</p>	<p>Action 1: Create a Music Office</p> <p>Action 2: Promote All Ages Access to Venues, Spaces and Events</p> <p>Action 5: Facilitate the Creation of Music Education and Professional Development Grants for Indigenous Peoples and Marginalized Communities</p> <p>Action 6: Involve Indigenous Communities in the Planning and Programming of Events</p> <p>Action 9: Support the Development of ‘Soft-Infrastructures’ in Victoria through Education Programs</p> <p>Action 11: Offer More Local Internships</p> <p>Action 13: Create an Event and Festival Strategy</p> <p>Action 14: Support the Marketing and Promotion of Music and Arts</p>	<p>Action 4: Offer Extended Venue Operating Hours</p> <p>Action 7: Create a Diversity-Centred Music Export Program</p> <p>Action 8: Support Music Education and Educators through Grants</p>

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	<p>Action 15: Promote Music Networking and Support</p> <p>Action 16 Organize Routine Diversity-Centred Music Workshops that Explore Skills and/or Cultural Relevance</p> <p>Action 19: Create Indigenous and MultiCultural-Centred Creative Spaces</p> <p>Action 20: Integrate Music into Tourism</p>	
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8. Conclusion

Music contributes to so many aspects of our lives. Regardless if it is relationships, community, or identity, music's contribution to our personal lives and our cities is invaluable. It is important that we not only recognize this, but also treat it with the same quality of care that it offers to us. There are no limits to where music can take us, whether it's increasing our mental health, fighting against inequality or driving an economy. However, a city must ensure they have enacted the right systems and approaches, should they want to fully activate their music ecosystem. This requires a reduction in boundaries and strategic planning, both of which are directly addressed throughout the recommendations in this study. These opportunities are guided by the voices of the local music actors throughout Victoria, but are also inspired by the exemplary practices of already established music cities around the world. Each recommendation is impactful, but it is only a piece of the many facets that make up the local music industry.

Without doubt, some of these recommendations are bold, while some may also seem unattainable. Despite these initial reactions, they are all possible. Some require simplistic alterations, while others require long term attention with continuous adjustments along the way. In almost all cases, each recommendation requires local music actors to take on a willingness to learn, to adapt and to lead. As the music market continues to grow, a city must be willing to do the same in regard to advocacy, support groups and educational opportunities. This is especially true in a city as diverse and unique as Victoria. Each recommendation has one primary goal, which is to enhance the music sector, regardless if it's a prideful artist expressing the musical identity of their community, or a cultural music group telling stories; all those who take part in music must be prioritized.

Perhaps the most important component to this entire study is the need for collaborations and partnerships. Unity will be the deciding factor in each step of this process and will ensure a successful recovery in a post-COVID world. It should be understood that music communities are not in competition with each other, they are working for each other. Simply put, music ecosystems won't work if the broader music community does not come together in support of an initiative. For mass audiences to engage in local music, tourism strategies must also be aligned. No matter what the topic, partnerships and cohesiveness are the defining factors. There is a strong need for the government to take a vested interest in music, in order to facilitate music-friendly policies, build the community, lean on one another and indicate the strengths that are offered by a valued music industry. Becoming a robust music city requires commitment and it requires action. As of right now, Victoria has many of the pieces it needs to maintain a successful music sector.

However, adjustments are in order. COVID-19 has undeniably impacted the immediate music industry, and relief efforts must be strengthened and continued to ensure resilience. Equitable opportunities for cultural groups, soft infrastructure developments and government participation are perhaps the most critical areas that require immediate action, both in addition to and alongside recovery work. Bearing in mind these tasks, it is important that Victoria does not fear making mistakes, but rather embraces them. The willingness to try is what matters most to music communities. This is a marathon, not a sprint. Along the way there

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will be adjustments and there will be trials, but the true benefits of a well-maintained music ecosystem will surely start to show themselves well before the “finish line” is even in reach.

ACKNOWLEDGMENTS

In response to a need to understand the music ecosystem in Victoria, Sound Diplomacy has prepared this report for the City of Victoria, Music BC and Creative BC, and the Victoria Music Advisory Committee.

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

APPENDIX

The material included in the appendix, for those who wish to explore further, contains:

1. Comprehensive Literature Review and Regulatory Assessment
2. Full Economic Impact Analysis
3. Full Survey Analysis
4. Music Asset Mapping Datasheet
5. Bibliography

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