



# INDY MUSIC STRATEGY

## Music Ecosystem Assessment & Strategic Plan 2021-2023

Final Report

July 2020

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# I. About the Indy Music Strategy

## Background

Sound Diplomacy hosted our first-ever U.S. Music Cities Forum in Indianapolis in 2018, centering Indianapolis in the Music Cities conversation and providing both a catalyst and foundation for bringing this project to life.

In February 2019, we began work on an extensive music strategy for the City of Indianapolis, working with the Indy Music Strategy Committee, an economic development initiative focused on the city's diverse and growing music industry. Sound Diplomacy was hired to support the Committee by providing data, research and insights on their music ecosystem, building up to the creation of a 3-year strategy that identifies what requires addressing in policy, stakeholder engagement and strategy.

Phase I of the Indy Music Strategy (February-June 2019) focused on the creation of a music vision for the city, followed by an ecological impact assessment, which included a regulatory assessment (an in-depth exploration of current local policies impacting music) and a benchmarking of Indianapolis against like-minded cities in the U.S. and abroad.

Phase II (July 2019-January 2020) brought the Sound Diplomacy team to Indianapolis for a week of roundtable conversations, site visits and interviews, which were complemented with an online survey to involve the breadth and depth of the Indianapolis music sector to better understand, gauge and measure its music ecosystem. We also identified music-related uses in Indianapolis in a music ecosystem map.

Following a year of work, the recommendations contained in this final report were developed shortly before the COVID-19 pandemic unfolded. Since then, lockdowns and other measures have been put in place to protect Indy's citizens, leading to a halt in economic and social activity that has deeply impacted the local music ecosystem. At the time of writing, the city is still under lockdown therefore it's difficult to predict with accuracy what the music ecosystem will look like, what the new normal will be and how the sector will operate a year from now.

However, the present strategy for the music sector considers the preexisting challenges that have been aggravated by the consequences of COVID-19 (e.g. low artist income, dependence on live music sector), and leverages the opportunities and strengths that will remain in place

after the crisis (e.g. increasing music industry training, promoting the music heritage, etc.) to ensure Indianapolis emerges from the crisis as a world-class music city in three years time.

## Indianapolis' Sound Path to Success

### A VIBRANT CULTURE & ENTERTAINMENT SCENE

Throughout the project, people have been referring to Indianapolis as an undervalued metropolis where there is more than meets the eye. Indy has plenty to be proud of and more; it is home to a welcoming and diverse community, with a wide variety of things to do and experience as a resident or a visitor. It embraces its passion for sports, from football to basketball, college sports and the Indy 500, and in past years locals and visitors have embraced its vibrant dining and arts scene.

As a music city, Indy has plenty of options to enjoy live music in intimate venues and on large stages, a close-knit independent music scene and a famed reputation for its culture of marching bands. Indy's audience and musicians have created many pockets of music activity across the expansive city, including a passionate indie rock scene, a supportive folk and songwriter community, an exciting hip-hop, rap and spoken word scene, and an assortment of other genres and events, spanning from techno to jazz to salsa, that reflect the diversity of Indianapolis' people and culture today.

One key element of its undervalued culture is its rich musical soul, stemming from the heritage of Black musicians and Black culture, and the golden Jazz Age of Indianapolis between the 1930s through the 1950s. The city also made its mark on the punk rock circuit with a refreshing counterculture scene in the 1970s, continuing well until the 2000s. While this past is still alive in the minds of many, the majority of Indy residents, Hoosiers and the rest of the world still needs to hear about this music heritage; how it came to be and how it ended.

This report contains some impressive figures about the importance of music to the city of Indianapolis and its socioeconomic development. Indy's music sector delivered an economic impact of \$1.199 billion in output and a total Gross Value Added of \$802.68 million to the local economy in 2017, the latest year with information from official sources. When we completed the mapping in February 2020, Indy had 116 places featuring live music, 75 music and instrument retailers, 116 music choirs and 34 music festivals, among other assets.

## SETTING THE GROUND FOR COLLABORATION

Despite these hopeful findings, the current COVID-19 crisis is wounding the sector with millions in losses of salaries, gigs and little-to-no-paid work for the Indianapolis music sector at the time of writing. The music strategy we present here acknowledges these challenges, but it is not intended to be a short-term fix, or provide an emergency pathway. Instead, it aims to create a long-lasting, wholesome foundation for once the clouds clear so Indy's music ecosystem can grow stronger and smarter. The recommendations we propose are flexible and implementation should be adapted and reassessed, at least yearly, according to the priorities and achievements from the previous implementation phase.

The Indianapolis Music Strategy we deliver today is a joint effort between Sound Diplomacy and the Indy Music Strategy Committee, its partners, and everyone who contributed to the study in any capacity. This plan encourages a more horizontal approach to sector development where Indy's musicians, industry professionals and organizations are actively working together and advocating for change, and the community understands the importance of the compensation of musicians, who feed directly into the different parts of the music ecosystem, creating strong development pipelines everywhere from management and music production, grassroots venues and instrument stores, music industry programs and knowledge sharing platforms.

The organizations and individuals implementing the strategy must place inclusion at the very core of their mission. Inclusion in this strategy is not only understood as promoting the rich and untold story of Indianapolis music heritage or paving the way for the next generation, but also making place for the current members of the music community who are women, people of color, differently abled persons, and/or come from marginalized areas in the city where access to music resources, infrastructure or high-quality music education is not (yet) available. They are the music ecosystem, and must be represented by all decision-making organizations.

All in all, we're excited for what lies ahead on Indy's sound path to success as a music city. Everyone in Indianapolis will benefit from having a strong, diverse and vibrant music ecosystem – they need to hear about how good it already is, and the rest of the world needs to hear it, too.



# Key Ecosystem Findings

The two parts of the Indianapolis’ music ecosystem – Artistic & Creative (musicians, songwriters, music performers, and composers) and Professional & Supporting (education, suppliers, and media) – delivered a direct economic impact of 5,925 jobs, \$183.78 million in earnings and \$803.53 million in economic output.

When including the indirect and induced economic effects, the Indianapolis’ music ecosystem generated an output of \$1.199 billion and a total Value Added (GVA) of \$802.68 million to the local economy in 2017. The total number of jobs generated and supported by the music sector in the area was 8,467, which accounted for 1.85% of employment in the city. The earnings generated within the Indianapolis Music Ecosystem totaled \$275.95 million.

Table 1. Direct, Indirect, Induced and Total Economic Impact

TYPE OF IMPACT	EMPLOYMENT, NUMBER OF JOBS	OUTPUT, MILLION \$	EARNINGS OR COMPENSATION, MILLION \$
<b>Direct</b>	5,925	803.78	183.78
<b>Indirect</b>	1,384	218.40	52.80
<b>Induced</b>	1,157	177.85	39.37
<b>Total Impact</b>	8,467	1,199.79	275.95

The majority of the direct economic value of the music ecosystem is created by the Professional and Supporting Segment (95%), while the Artistic Segment represents 5% of the direct economic output and 11% of employment.

As mentioned above, the total employment created and supported by Indianapolis’ music ecosystem generated 1.85% of the city’s employment. This figure is bigger than the national average (1.3%), and New York City (1.4%). Nevertheless, it is smaller than cities with strong music ecosystems such as Austin (2.55%), or the relatively small and vibrant city Asheville (2.74%).

The findings below are compiled from our survey, interviews and roundtable sessions, as well as the findings from the ecosystem mapping:

STRENGTHS	CHALLENGES
<ul style="list-style-type: none"> <li>● Diverse population makeup with a large percentage of young workers</li> <li>● Excellent variety of music education opportunities that need to be further supported and promoted</li> <li>● Diverse ecosystem of music genres, talent and venues (although limited audience engagement)</li> <li>● Wide live music offer at any day of the week, from major touring acts to small intimate venues</li> <li>● Rich music heritage of performers, venues, businesses, and recorded music untapped in the city's present narrative</li> <li>● Presence of national music organizations and music competitions</li> <li>● Music is embedded in local regeneration plans (e.g. Indiana Avenue, White River)</li> <li>● Positive experiences with busking regulations and city-led busking programs in the past</li> <li>● Supportive communities of artists, professionals and music spaces, particularly within the same music genre</li> <li>● Cultural Districts concentrate the offer of music and cultural activities, a key marketing asset for tourists and locals</li> </ul>	<ul style="list-style-type: none"> <li>● Absence of a music office or equivalent to bridge private and public sector and align goals and priorities</li> <li>● Lack of diversity in local industry leadership</li> <li>● Gaps in accessibility and equity in the music ecosystem for artists, professionals and audiences of color, female and non-binary and/or LGBTQ+, and for differently-abled persons.</li> <li>● Absence of equity frameworks in music-related funding and policy development</li> <li>● Regulation limits participation in venues for artists and audiences under 21</li> <li>● Unclear policies leave the music sector defenseless in regards to noise compliance</li> <li>● Limited opportunities for full-time industry employment and artist support roles</li> <li>● Gaps in live music offer in communities far from entertainment districts</li> <li>● Few music business education options and mentoring opportunities in the city</li> <li>● Lack of a music tourism strategy leveraging the city's heritage and its vibrant music scene as assets</li> <li>● Lack of sensible policing regarding security and safety issues at music spaces/events</li> </ul>

## Indianapolis: a Music Ecosystem Vision

At the beginning of the research process, the following goals were articulated by Sound Diplomacy to identify how Indianapolis' music ecosystem and its stakeholders can be best supported from the bottom-up and the top-down. This vision is our aspiration for Indianapolis if we consolidate all the recommendations in this strategy.

### Music is for Everyone

Indianapolis has been intentional in its diversity, equity and inclusion efforts around the development of its plan and thus has ensured that all Indianapolis musicians and the wider music business ecosystem feel ownership of the Indy Music Strategy. The city has ensured that the development of its music ecosystem happens with diverse musicians empowered and at the table to have a voice in the process.

As a result, musicians and fans in Indianapolis feel included and represented in the music story regardless of their race, gender, age or neighborhood. Indianapolis has taken steps through smart policy to encourage more development of all-ages venues and youth music programs, access to music education in public schools, and recognizes the unique needs of different metro areas when it comes to participation in music.

Indianapolis considers both the preservation of its historical music cultural assets and how its music strategy can create opportunity and activity around the metro area that truly look and sound like the city, in an ecosystem that invites all music fans and music makers to participate without needless boundaries to access or discrimination.

### Music Requires Smart Policy

Indianapolis has shed or revised clunky, outdated policies that inhibit the growth of its music and culture, including its dance hall ordinance and liquor laws that can stifle an all-ages music scene. It has also filled policy gaps by introducing new, smart ordinances that offer protections and supports for musicians, including protecting live music venues and other premises with an Agent of Change policy and spurring economic growth through an artist compensation policy that establishes fair payment as a core value of city government.

The approach not only makes Indy a safer and more opportune place to live and work, but signals to the music and wider business community – artists and fans alike – that the city is serious about supporting and growing its music infrastructure.

## Music is a Continuous Learning Process

Indianapolis knows that its music ecosystem will only be as vital as its music education offerings and music engagement for young people.

The city has been intentional about expanding access to music for children and increasing the overall youth participants in music across the metro area. Not only does music education have broad positive outcomes for all students, including those who do not pursue music professionally, it also builds skilled music professionals for the future of Indy and helps to create a more inclusive and economically powerful music workforce.

Indianapolis supports access to music education and integrated music curriculum in its primary schools but also understands the power of music education and engagement in churches, community centers, at its colleges and universities, and through music industry training programs for artists and aspiring industry professionals.

## Music Means Business

Indianapolis doesn't work to make its music business ecosystem like any other city. Instead, it recognizes its current music business assets – including relationships with supply chain manufacturers like Yamaha – and provides support and connectivity to those businesses to enhance the uniquely Indy music business infrastructure, as well as access to music business education to empower entrepreneurs.

The city doesn't spin its wheels trying to build a different music industry – instead it focuses on helping the existing unique DNA of the music business here to flourish, creating a unique value proposition for working and doing business in Indianapolis. It has been intentional in this process about both protecting its culture and historic music assets, and in identifying barriers to access and ownership for musicians and music businesses.

## Music is Infrastructure

Indianapolis understands deeply both the individuals or businesses but also the networks that make up its current music ecosystem, including music education offerings across age groups, music venues, instrument manufacturers, rehearsal spaces, etc. It uses this knowledge of its music assets and its awareness of the geographic clustering of assets to identify gaps and create strategies to grow assets that are uniquely suited to the Indianapolis market.

This deep understanding also allows Indy to build better relationships between its business and music communities, breaking down silos and better connecting diverse industries to the existing music infrastructure.

## The Music Ecosystem is Vast

Indianapolis knows that its music story is unique – it's not just about pop or commercial music venues, and thus requires a holistic approach to the celebration and support of a broad music culture.

Indy embraces as part of its music strategy its up-and-coming Soundcloud rappers and underground musicians, as well as its long history with the Drum Corps International, which brings tens of thousands of talented young musicians to the city each year and will generate more than \$115 million in economic impact over the next decade.

Indy sees its identity as a music city as defined by all of these elements – the contemporary and the historic – and seeks to understand not just their economic value but also where they sit in the cultural fabric of the city.

## Music Connects Past, Present and Future

Indianapolis understands that the strongest foundation for building and sustaining a thriving music city is its music history and legacy, but in doing so, it will consistently recognize and address its past racial inequality.

The city leverages and celebrates that history, seeking out ways to honor it, protect it, and leverage it for economic growth. The city considers smart ways to do both, like investing into historic districts such as Indiana Avenue and historic venues like the Walker Theater, facilitating new activation opportunities, and supporting existing efforts such as Indy Jazz

Festival, all of which honor the city's rich musical legacy while inviting engagement with contemporary Indy musicians. Saving the spaces and places of a city's musical past is a critical step to establishing its musical future.

## Music is an Experience

Indianapolis invites the world to experience its music through a compelling music tourism strategy that amplifies the city's music history and legacy while also elevating its current music makers and innovators.

Through an active approach, which might include visual and copy elements for branded advertising and promotion, but would also include the activation of spaces and places in the city to encourage visitors to engage in music – like a dedicated Indianapolis music month – the city will grow the economic impact of its tourism, enhance civic pride among residents, and increase opportunities for Indy musicians.

A music tourism strategy elevates Indy to a national and international stage, while attracting a previously untapped visitor set. This includes maximising existing assets more, from the Murat Theatre to the Rhythm Discovery Center and the jazz heritage on Indiana Avenue.

# II. Indianapolis Music Ecosystem Analysis

## Methodology and Sources

### Roundtables & interviews

The Sound Diplomacy team’s first field research visit to Indianapolis for the Indy Music Strategy took place between July 8th and 12th, 2019. Azucena Micó and Michaela Marchardt, Senior Project Managers, spent a week in the city conducting a series of roundtables and interviews with local stakeholders and visiting a number of select music spaces with Jim Rawlinson from Indy Chamber.

In conjunction with a trip to the International Economic Development Conference happening in Indianapolis October 13-16, Director of Projects for North America Elizabeth Cawein conducted two supplemental roundtable sessions at the request of the Indy Music Strategy steering committee with key groups who had been underrepresented in the survey and in-person meetings thus far.

### SCHEDULE

During the week in July, Sound Diplomacy conducted 13 roundtable sessions and several interviews. They also attended an Indy Music Strategy Steering Committee meeting, participated in the July’s Indy Music Social event at Healer, visited many different music spaces in the city and got the chance to experience its music scene. Sound Diplomacy hosted two roundtable sessions in October, focusing on hip-hop, Black promoters and the Latinx community, and Elizabeth Cawein also attended a steering committee meeting for the Indy Music Strategy. Overall, Sound Diplomacy met more than 140 people during both visits.

	MON 7/8	TUE 7/9	WED 7/10	THU 7/11	FRI 7/12	MON 10/14	TUE 10/15
9:00		Roundtable : Music Education	Roundtable : City Government, Cultural Planning and Tourism	Roundtable : Media	Roundtable: Government, Policy and Planning		
9:30							
10:00	Interview: Dan Kemer, Live Nation						

cont.	MON 7/8	TUE 7/9	WED 7/10	THU 7/11	FRI 7/12	MON 10/14	TUE 10/15	
11:00	Indy Music Strategy Steering Committee Meeting					Indy Music Strategy Steering Committee Meeting		
11:30		Roundtable : Music Organizations	Roundtable : Music Events, Production and Promoters	Roundtable : Private Sector	Roundtable: Classical Music			
12:00								
12:30								
14:00			Visit: HIFI	Visit: Broad Ripple	Interview: Steve Campbell, Indianapolis Colts			
14:30								
15:00	Roundtable: Recorded Music Industry and Studios	Visit: IUPUI / Walker	Visit: Fountain Square	Visit: Indy CD & Vinyl / LUNA				
15:30								
16:00		Event: Indy Music Social	Visit: Garfield Park					
16:30								
17:00								
17:30								
18:00	Roundtable: Artists 1		Roundtable : Music Retail and Tech	Roundtable : Artists 2		Roundtable: Hip hop and Black promoters	Roundtable: Latinx Music Community	
18:30								
19:00								



# Economic Impact Assessment

The economic impact analysis is macroeconomic research based mainly on official secondary sources and statistics, complemented by primary research conducted by Sound Diplomacy. It provides a reliable measure of the economic importance of the music ecosystem in Indianapolis’ economy on three different scales: direct, indirect and induced impact.

The results contained in this report correspond with data from 2017 and previous years. This is because most of the official data sources used have a three year delay. The most updated version available for the County Business Patterns and RIMS II multipliers was data from 2017.

Table 2. Definitions in the Economic Impact

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

The variables evaluated as part of the economic impact assessment are: music ecosystem output, employment, gross value added (GVA), workers’ compensation or wages, and average income of music ecosystem workers.

Table 3. Variables Evaluated in the Economic Impact

VARIABLE	DEFINITION
<b>The music ecosystem output<sup>1</sup></b>	All produced goods and services of the music ecosystem in Indianapolis. For example, concert tickets sales, recording studios services, etc.
<b>Music ecosystem employment<sup>2</sup></b>	The number of active jobs in the production of music ecosystem goods and services.
<b>Music ecosystem compensation<sup>3</sup></b>	Remuneration (including wages and salaries, as well as benefits such as employer contributions to pensions and health funds) payable to employees in return for their music ecosystem work during a given year.
<b>Gross value added (GVA)<sup>4</sup></b>	The music ecosystem output minus music ecosystem intermediate consumption (the costs of all inputs—for example, equipment rented by a live music promoter).
<b>The annual average income of the music ecosystem workers</b>	Describes the average income of the music ecosystem workers based on several variables such as sex, age, race, etc.

## Classifications

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

- **The Classification of Economic Activities of the North American Industria Code 2017 (NAICS)** is the standard used by federal statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the U.S. business economy. It was used to calculate the economic activity in Indianapolis that is attributable to the definition of the music ecosystem.

<sup>1</sup> Bureau of Economic Analysis (2016)

<sup>2</sup> Ibid.

<sup>3</sup> Ibid.

<sup>4</sup> Ibid.

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

### Geographical Scope

The geographic scope of this assessment is limited to the City of Indianapolis (Marion County Indiana). For the list of zip codes see the appendix 2.

### Data Sources

Five main data sources have been used to conduct the economic impact analysis in the Indianapolis area:

Table 4. Data Sources in the Economic Impact

DATA SOURCE	DETAILS
<b>County Business Patterns: 2017</b>	This source allows the calculation of the number of establishments and employees in Indianapolis' music ecosystem by detailed industry. It also allows calculating the share of music ecosystem establishments within the state of Indiana.
<b>BEA Regional Economic Accounts GDP by State 2001 - 2017</b>	This source provides GDP data according to big industries at the state and metropolitan level.
<b>Regional Input-Output Modeling System (RIMS II)<sup>5</sup></b>	RIMS II provides both Type I and Type II regional input-output multipliers to estimate the indirect and induced economic impact of the NAICS economic activities at the city level.  Type I multipliers account for the direct and indirect impacts based on the economic dynamics of the music ecosystem supply chain. Type II multipliers account for both indirect and induced impacts based on the purchases made by employees of the music ecosystem.

<sup>5</sup> See definitions in Appendix 3

<p><b>The American Community Survey 2013 - 2017</b></p>	<p>The American Community Survey (ACS) allows the identification of the average income of different occupations associated with the music ecosystem.</p>
<p><b>Quarterly Census of Employment 2017</b></p>	<p>Quarterly Census of Employment provides the employment information per the North American Industry Classification System (NAICS) activity. From the latter, the details used are for the activities associated with the music ecosystem.<sup>6</sup></p>
<p><b>Sound Diplomacy primary data</b></p>	<p>This data, collected through the sectoral survey, roundtables and the mapping of agents, enables us to identify missing data and data that does not necessarily correspond to the music ecosystem but that was found in the official databases.</p>

## Mapping

Sound Diplomacy identified music-related uses within the City of Indianapolis postcodes<sup>7</sup>, producing a mapping with our proprietary mapping tool and cross-referencing manually by our team, with inputs from Indy’s music community. The maps are available here:

- Live Music Assets: <http://bit.ly/IndyMusicMapLive>
- Music Industry Assets: <http://bit.ly/IndyMusicMapIndustry>
- Music Education Assets: <http://bit.ly/IndyMusicMapEducation>

The Indy Music Map became publicly available on the Indy Music Strategy project website<sup>8</sup> on December 12, 2019, featuring an interactive map and a list of places/organizations and addresses ordered per category. The map also accepted submissions of Indianapolis-based places and organizations that were missing between December 12, 2019, and January 12, 2020. 18 new places were received during this period and were incorporated into the mapping.

<sup>6</sup> See Appendix 5

<sup>7</sup> The full list of zip codes used to tag music-related uses in the City of Indianapolis is available in United States Zip Codes (2019)

<sup>8</sup> Sound Diplomacy (2020)

In addition to the localization of the assets, Sound Diplomacy manually mapped the capacity of performance spaces available in Indianapolis through desk research and direct outreach. Despite these efforts, 51% of the venues mapped did not provide information on their capacity.

The mapping acknowledges that ‘one person operation’ businesses, such as independent contractors without a registered business name and address, may not be reflected in the mapping, such as freelance professionals in the categories of Music Schools (Instructors), Recording Studios (Producers), and Other Music Businesses.<sup>9</sup> Moving forward, it is recommended that those types of agents and their operations are internally mapped to establish further patterns and characteristics of the local music ecosystem.

## Music ecosystem survey

Sound Diplomacy developed a 15-minute survey to gather information from music fans, music industry professionals and musicians that are based in Indianapolis (and engage in music activities there) to understand the music ecosystem in the region. Indy Music Strategy collaborated with Sound Diplomacy in the design of the survey and for its dissemination and promotion.

The ‘Indy Music Strategy’ survey was hosted on the SurveyGizmo platform and open for 13 weeks, from August 23rd to November 24th, 2019. The survey was available in English and in Spanish and the system allowed respondents to save their answers and return at a later time to complete the survey.

After an examination of the 1,892 responses the survey received, a total of 1,052 individual responses with complete or substantially complete status were marked as fit for analysis.

Featuring separate tracks of questions for audience members, artists, businesses and professionals, the survey covered a wide range of topics in a concise manner, adding an extra level of insight. Topics covered included:

- Demographics
- Music ecosystem roles
- Musical skills and educational background

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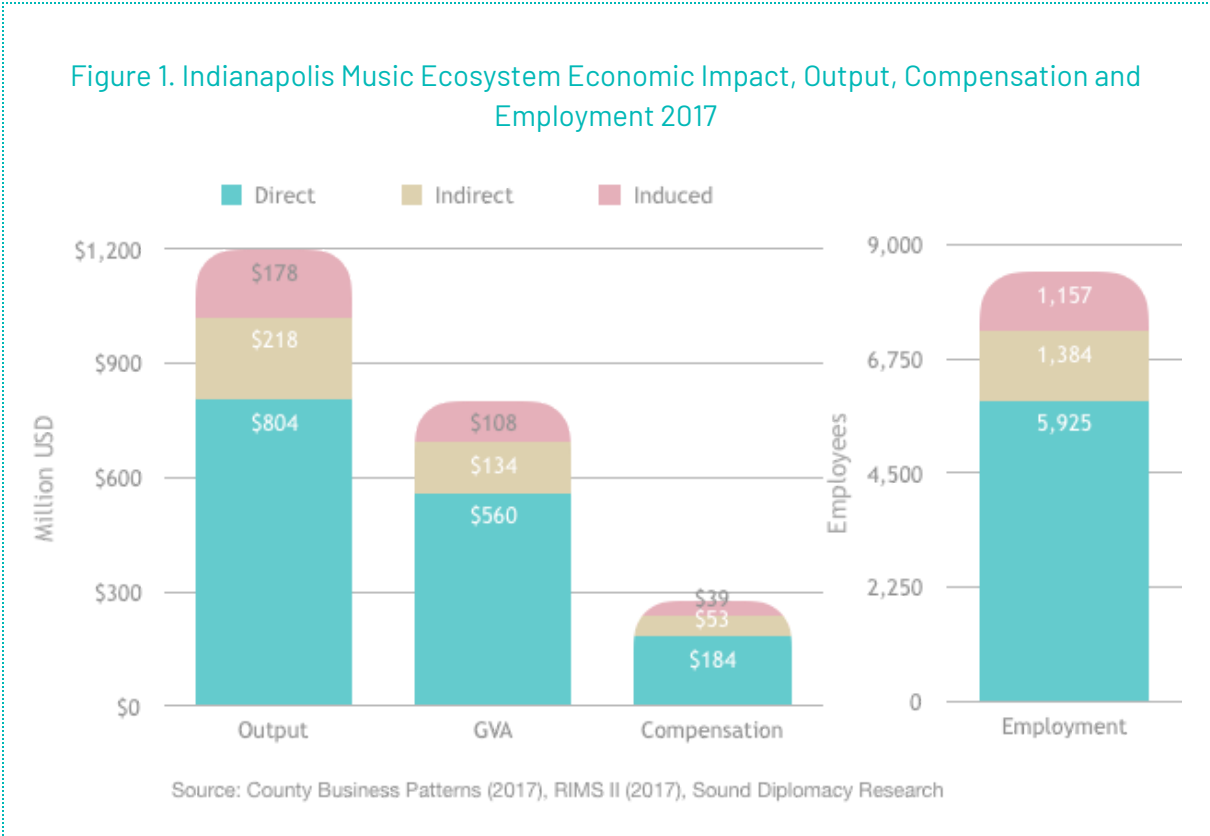
<sup>9</sup> The economic impact analysis in Stage III of the Indy Music Strategy will further confirm or contextualize these findings.

- Artist, professional and business finances and revenue streams
- Music ecosystem strengths and challenges
- Areas needing government support
- Live music ecosystem, including audience habits

# Music Ecosystem Economic Impact Assessment

## Overview

The following figure summarizes the economic impact (direct, indirect and induced) of the music ecosystem in Indianapolis for 2017.<sup>10</sup> The total number of jobs generated and supported by the music sector accounted for 8,467 (1.85% of employment in the city). The employees compensation within the Indianapolis Music Ecosystem totaled \$275.95 million. The total output and GVA reached \$1.19 billion and \$802 million respectively (see figure 1). Furthermore, it was estimated that \$1,000 of music ecosystem output generated a total effect of \$493 (\$271.8 indirect effect + \$221.34 induced effect) in different industries of the local economy.



<sup>10</sup> The most updated version available for County Business Patterns and RIMS II is 2017.

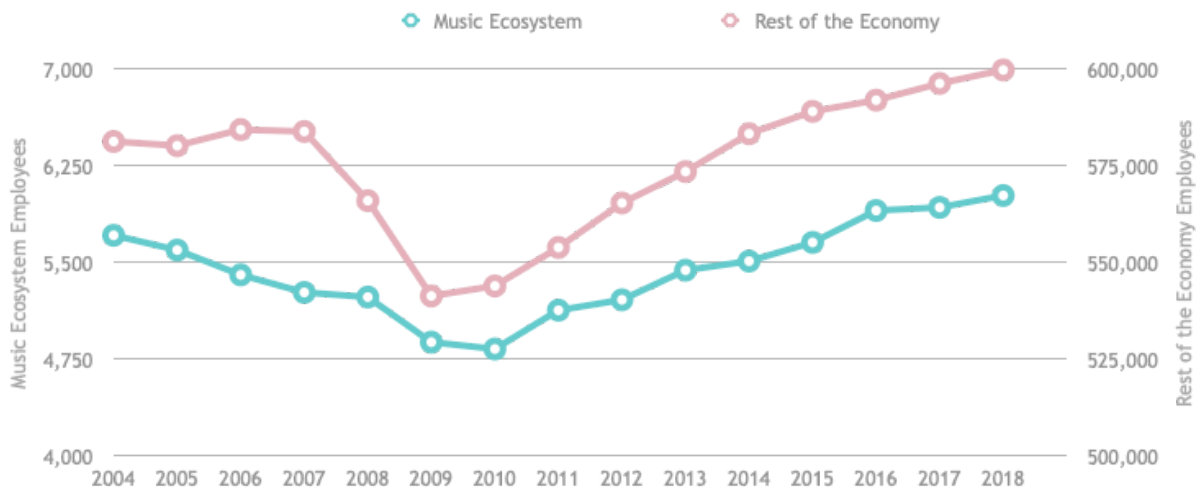
The following sections give an overview of the direct, indirect and induced impact of Indianapolis' music ecosystem.

## Direct Impact

The direct impact reflects the economic value created directly by the activities of the music ecosystem. The music ecosystem produced a direct output of \$803.53 million and an estimated GVA of \$560.27 million. They were responsible for 5,925 direct jobs, and the compensation of these employees (including professionals and artistic segments) reached \$183.78 million.

According to our calculations, the direct employment derived from the music ecosystem grew 5.4% between 2004 and the end of 2018, which represents almost twice the growth of the employment of the rest of the economy during the same period (see figure 2). The figure shows that the subprime mortgage financial crisis, which started in 2007 and ended in 2010, had an effect on the employment not only for the overall economy of Indiana, but also for the music ecosystem (average decrease of 2.8% for music ecosystem and 2.3% for the rest of the economy between 2008 and 2010).

Figure 2. Indianapolis Music Ecosystem Economic Direct Employment 2004 - 2018<sup>11</sup>



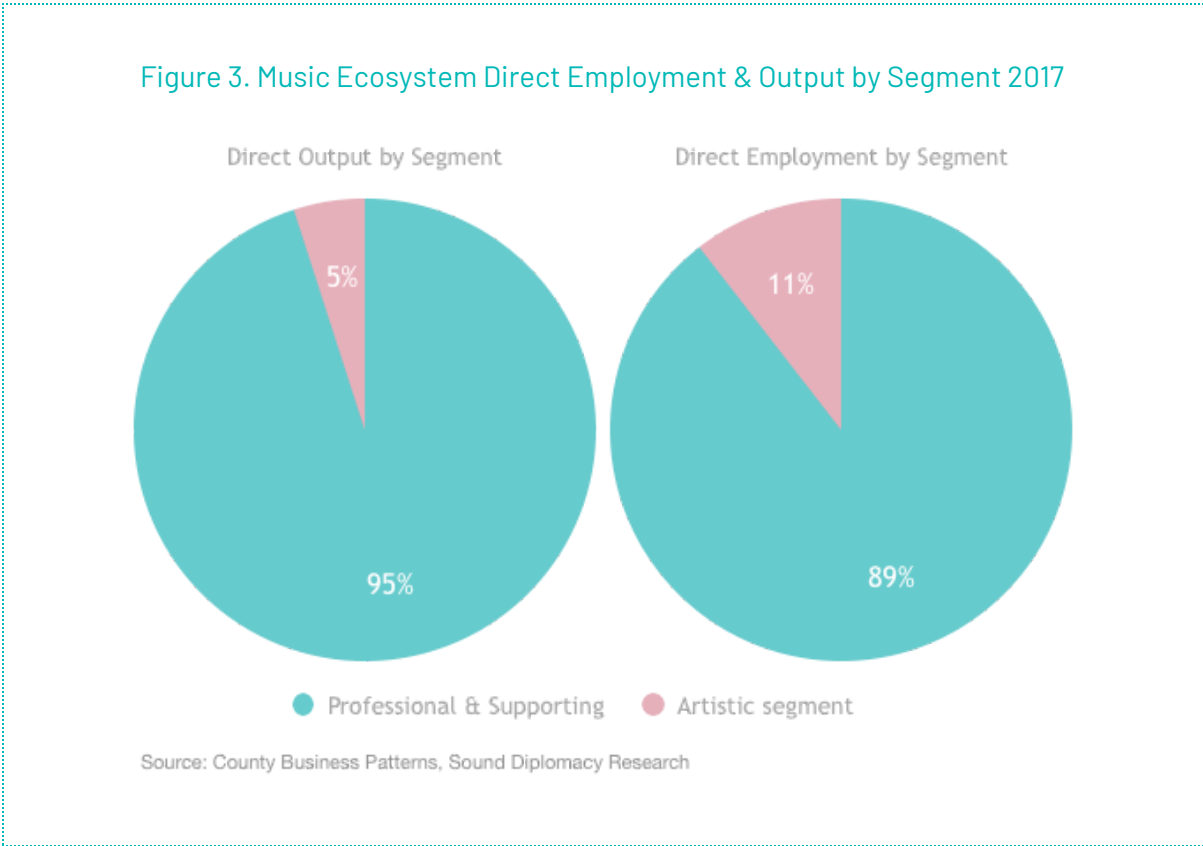
Source: Quarterly Census of Employment and Wages 2004 - 2018. Sound Diplomacy Research

<sup>11</sup> We excluded the economic activity '51511 Radio broadcasting' when calculating the employment trend from the source Quarterly Census of Employment and Wages. This exclusion was necessary since there was information of employment of that industry only from 2008 until 2014. Including it would have generated a distortion in the employment trend.



The economic activities related to the Artistic & Creative segment of the music ecosystem<sup>12</sup> represented 5% (\$40 million) of the direct output of the music sector, while the Professional & Support segment comprised 95% (\$764 million). This figure could be explained by some of the survey findings, for instance, it is known that one-third of artists that responded to the survey are not earning any revenue from their music and 87% made less than \$25,000 from music, including additional music jobs (such as teaching).

When assessing the employment, of the total direct jobs created by the music ecosystem, 89% (5,303) belonged to the Professional & Supporting segment, while 11% (623) belonged to the Artistic & Creative segment (musicians, songwriters, music performers, and composers – see figure 3).

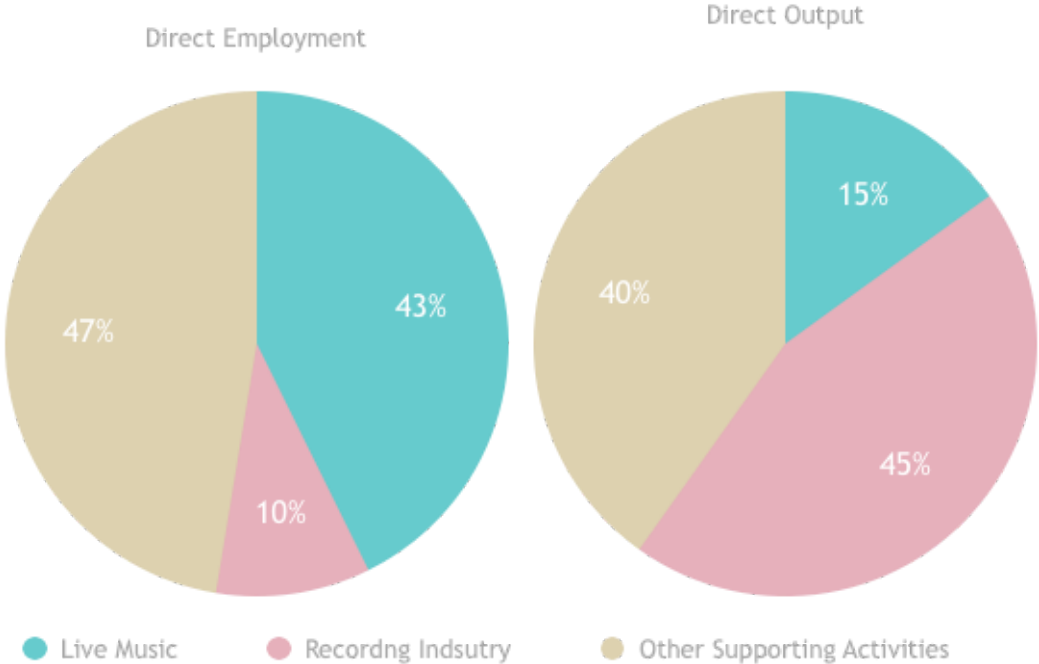


<sup>12</sup> Artistic segment of the music ecosystem: According to the NAICS 2017, this activity comprises musicians (songwriters, music composers), music groups and performers.

The highest share of employment within the Professional & Supporting segment corresponds to “Other Supporting Activities” sub-segment (including Radio Broadcasting, Instruments Supplies & Record Stores and Music Education) with 47% or 2,513 jobs. The next major employment sector is the Live Music sub-segment, which represents 43% or 2,263 jobs. Lastly, the Recording Industry sub-segment represents 10% or 526 jobs within the Professional & Supporting segment (see figure 4).

When evaluating the output of the sub-segments, the distribution changed drastically in comparison with the employment. “Other Supporting Activities” generated 40% of the segment output, while the Recording Industry sub-segment contributed with 45% and Live Music contributed with 15% (see figure 4). This could be explained by the differences in the number of people employed according to the output generated by each sub-category. In this case, Live Music sub-category requires more employees to provide its services, while the Recording Industry sub-category needs fewer employees and more capital investment to provide its services, generating a bigger output.

Figure 4. Direct Employment Professional & Supporting Segment 2017



Source: County Business Patterns 2017, Sound Diplomacy Research

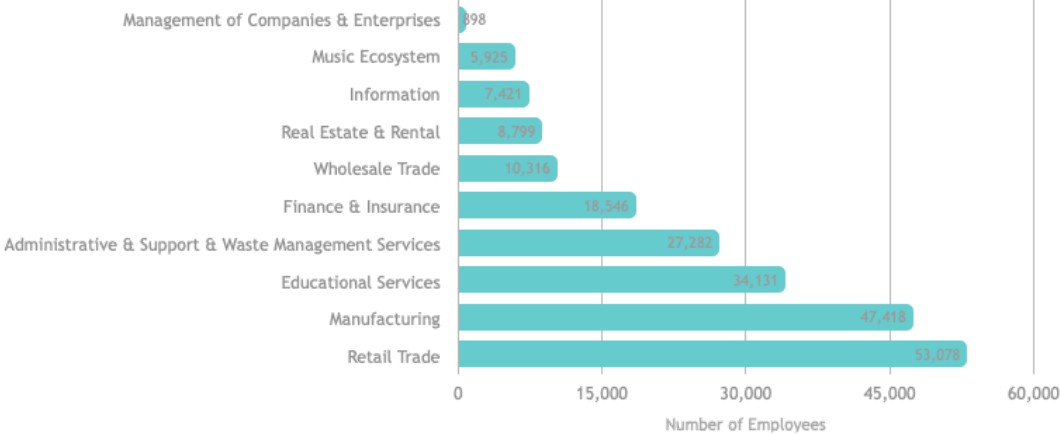
From the above, it can be concluded that the Indianapolis music ecosystem is specially oriented to live music and support activities associated with the night-time economy, meaning that it has a strong infrastructure for live shows that could be a factor and opportunity to enhance the sustainability models for the local artists.

A figure that demonstrates the differences in the amount of employment created by each sub-segment is the composition of the resources or inputs needed to produce goods and services, technically called intermediate inputs.

In that sense, there is a significant difference in the proportion of resources spent on labor costs in the Recording Industry sub-segment compared to the other two sub-segments. The labor costs of the Recording Industry sub-category represented on average 13.8% of the total production costs, while for Live Music and Other Supporting sub-categories the figure reached approximately 32% each. Those figures again show that the Recording Industry sub-category requires fewer employees to produce their services, in contrast to the other two.

To put this in perspective, the direct employment of the music ecosystem (5,925) represented more than half of the employment supported by the Wholesale Trade sector in the city (10,316) in 2017. It was slightly lower than the employment generated by sectors such as Information (7,421) and Real Estate & Rental (8,799) as shown in figure 5 below.

Figure 5. Direct Employment by Industry in Indianapolis 2017



Source: American Community Survey 2017, County Business Patterns 2017, Sound Diplomacy Research

## Indianapolis Music Ecosystem Wages

Using the American Community Survey's five-year estimates for 2013 to 2017, we compared the annual average income by economy (music ecosystem vs. the rest of the economy) and by segment (Artistic & Creative and Professional & Supporting) in Indianapolis. The individuals were classified as part of the music ecosystem or part of the rest of the economy, based on the activities they declared as their occupation (see Appendix 4).

Figure 7 presents the annual average income over time, comparing the music ecosystem to the rest of the economy. The overall average income difference (gap) for the years 2013 and 2017 is 8% (\$2,300). To put this in perspective, it was found that in New Orleans this gap was slightly smaller than Indianapolis, reaching 6% during the same period.

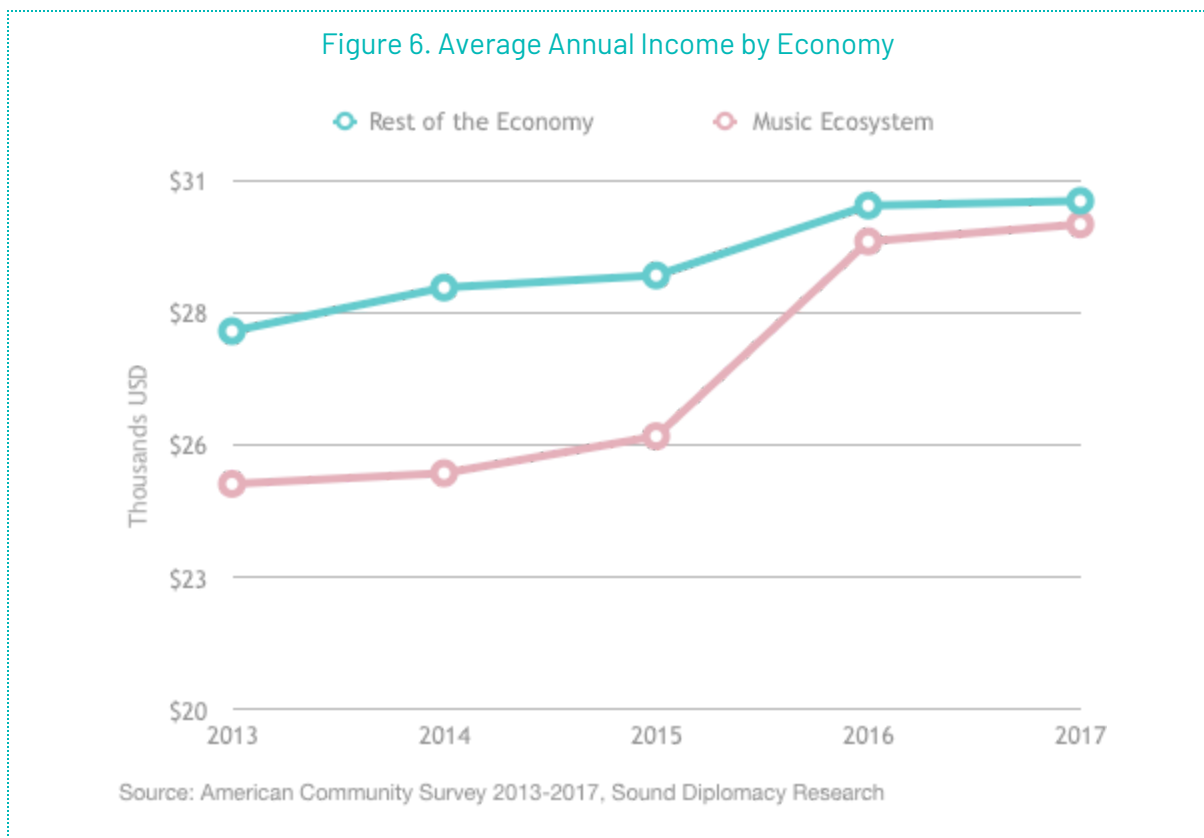
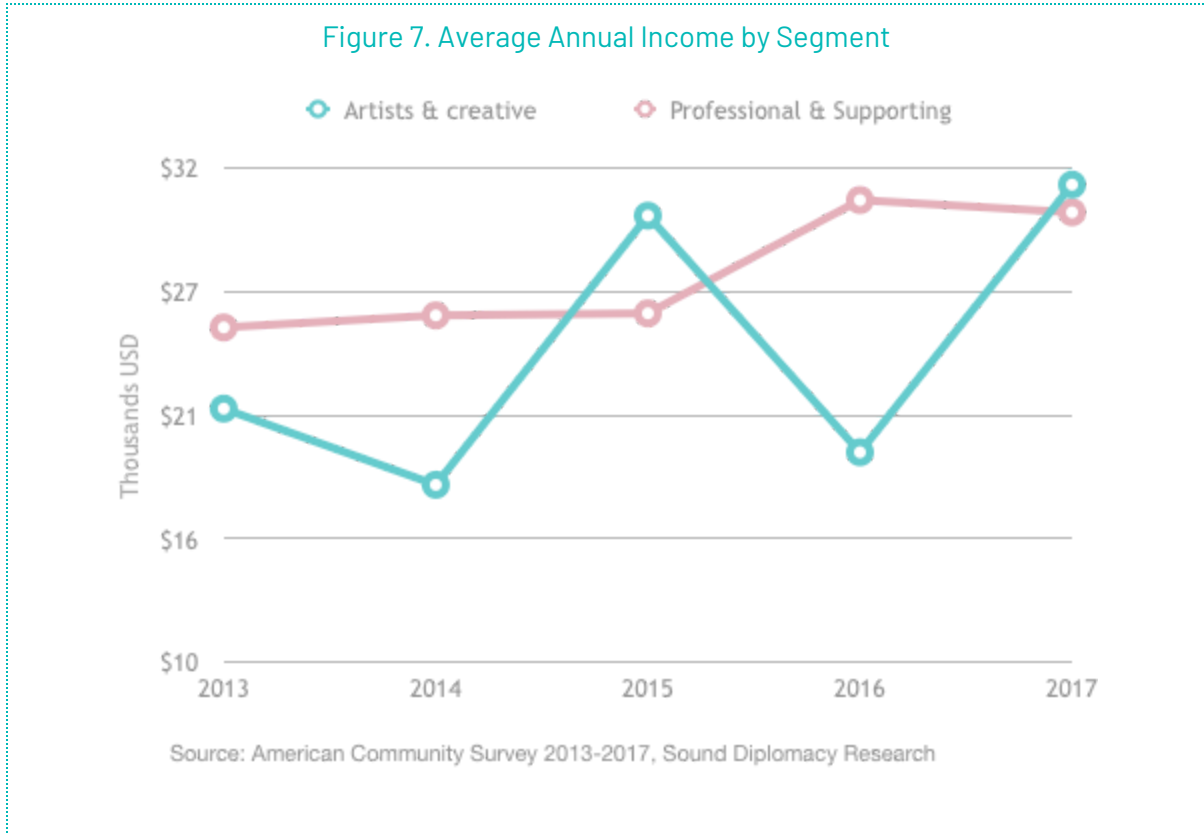


Figure 7 shows the annual average income over time for Professional & Supporting and Artistic & Creative segments. It illustrates the income differences (gap) between the two

segments, which was narrower only in 2017 with a gap of only \$1,200. In contrast, 2016 was the year with the highest gap (\$11,200).

In addition, it shows that both segments don't follow the same cycle, where in most cases when there is an increase in the average income in one segment, it decreases in the other.



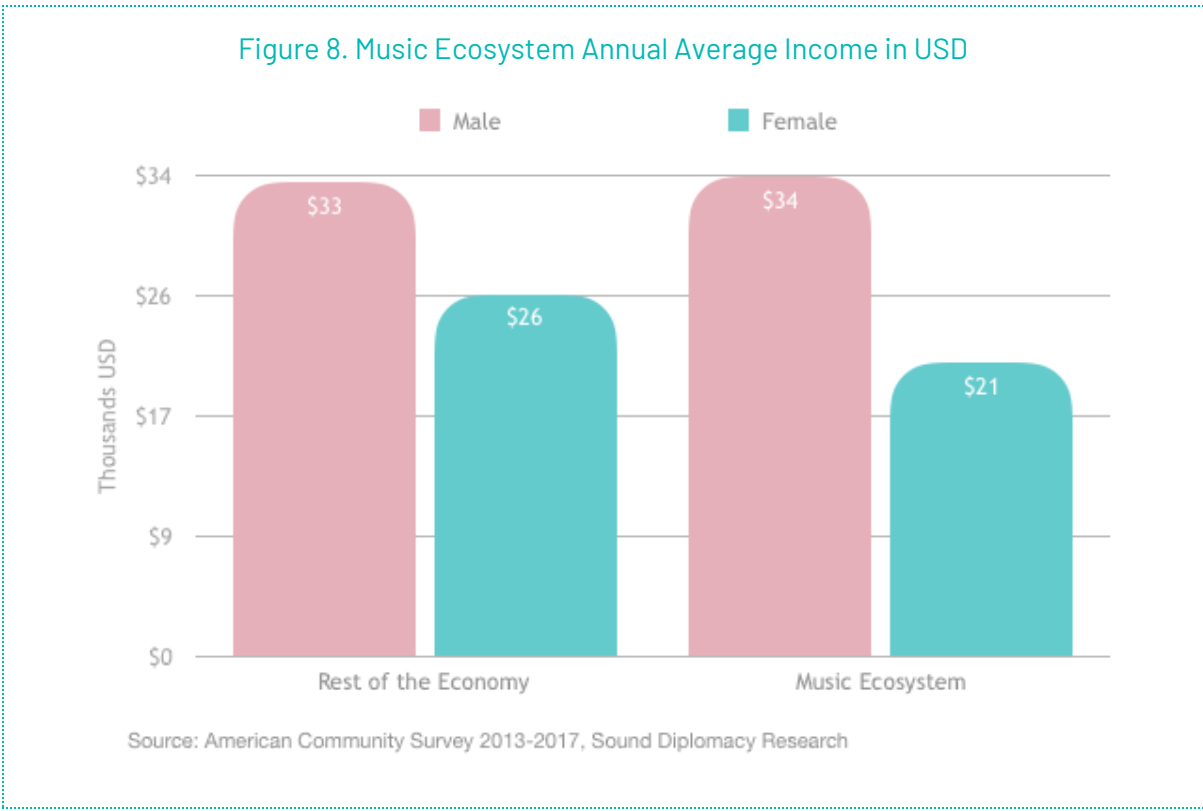
Based on data from the American Community Survey (2013-2017), we calculated the average income for different subpopulations.<sup>13</sup> In order to see whether the differences in income are statistically significant or not, we performed linear regressions per subpopulation and performed an adjusted Wald test.<sup>14</sup> The following figures present average income by gender for the music ecosystem and the rest of the economy, and compare income across the music ecosystem by segments and race (white, Black or African American and other races).

<sup>13</sup> In order to make the estimates more robust to potentially spurious outliers, the wages are winsorized at 90%. This means that all wages below the 5th percentile are set to the 5th percentile, and all wages above the 95th percentile are set to the 95th percentile. Furthermore, we exclude estimates with less than 30 observations.

<sup>14</sup> We perform linear regressions where the constant income is the independent variable followed by an Adjusted Wald test. When the p-value in the Adjusted Wald test is lower than 0.05, then we can reject the null hypothesis where the average income between segments are the same. Important to note that the latter is the methodology chosen to capture the standard errors, using the successive difference replication method as suggested by IPUMS USA. <https://usa.ipums.org/usa/repwt.shtml>

Figure 8 shows the average wage for men and women when comparing the music ecosystem to the rest of the local economy. Men earn on average the same (1% gap) in the music ecosystem (\$33.8k) and the rest of the economy (\$33.4k). The latter is also supported by the p-value since it is equal to 0.7047, confirming the differences are not statistically significant. The segment difference (gap) is more visible for women, who earn 19% less in the music ecosystem than in comparison with women in the rest of the economy (\$20.7k vs. \$25.6k). Since the p-value is < 0.05 (0.000), we can reject the hypothesis that the average income for women in the music ecosystem vs the women in the rest of the economy is the same.

In addition, women in the music ecosystem have a higher income gap with men in the same sector (gap of 39%) which is higher than the income gap between women and men in the rest of the economy (gap of 23%).



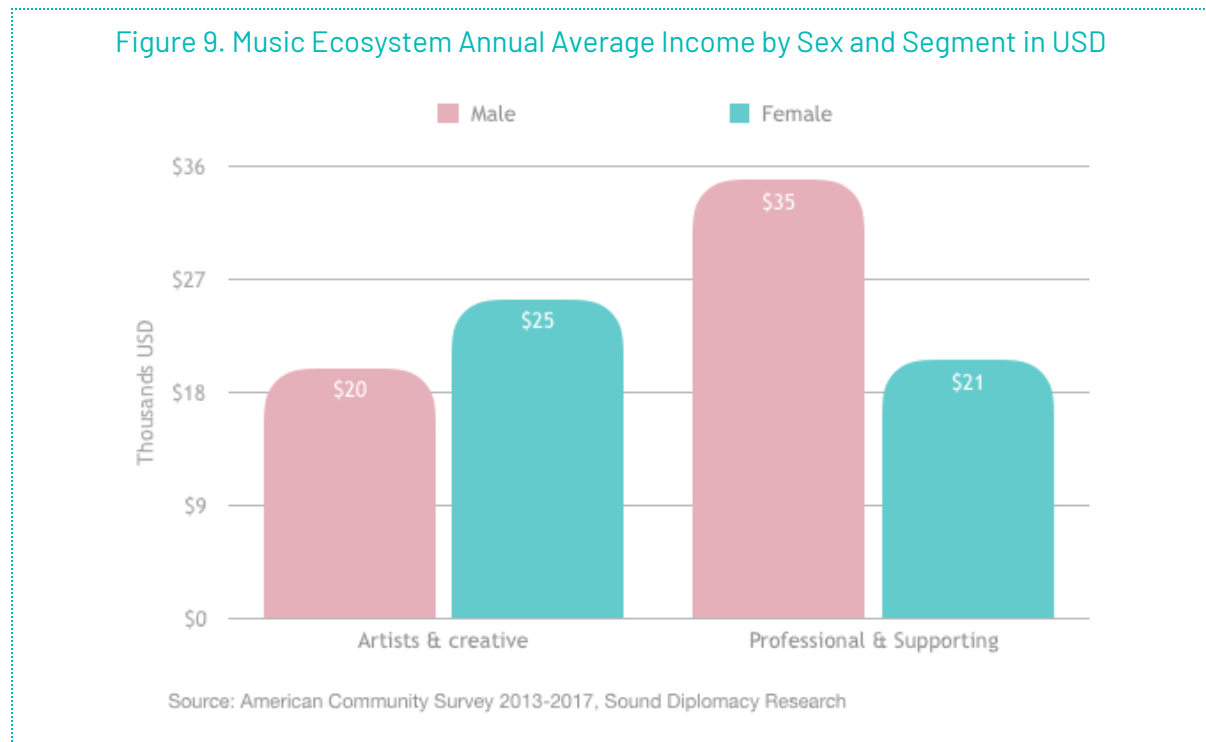
To put the above in perspective, in the case of New Orleans and Fort Worth, TX, the gaps of female music ecosystem workers vs. male music ecosystem workers were 40% and 54% respectively, which are higher than the gap identified in Indianapolis.

It is important to note that there are no known statistics available for non-binary gender representations in music, including trans and intersex, hence the simplified analysis defining sex as either female or male.

Figure 9 compares the average income by gender and music ecosystem segment. On average, men earn considerably more (43%) in the Professional & Supporting segment (\$33.4k) compared to the Artistic & Creative segment (\$19.8k), while the difference is also significant by statistical means (p-value= 0.0000). In contrast, women appear to earn more in the Artistic & Creative segment than in the Professional & Supporting segment (24% more), however it is not statistically significant (p-value= 0.2658).

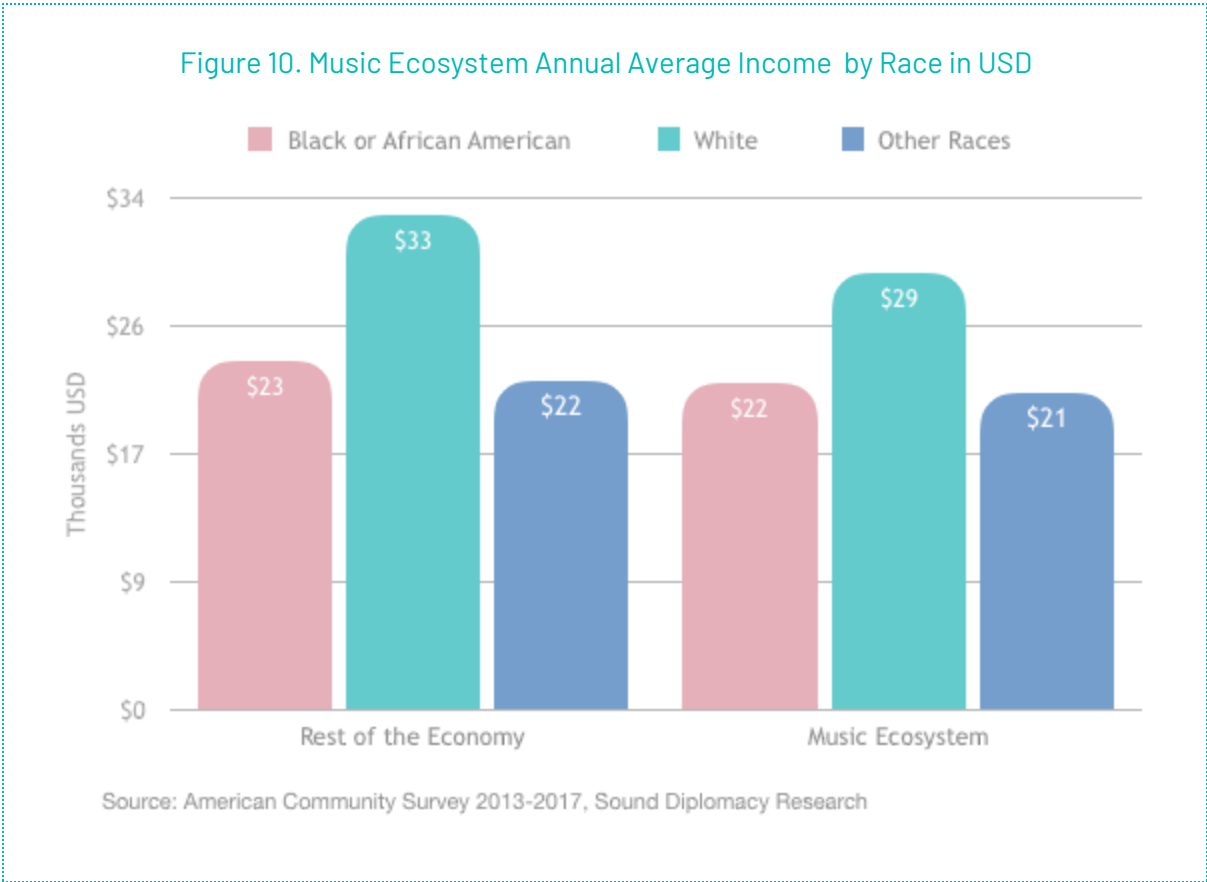
The gender income gap becomes only apparent in the Professional & Supporting segment, where men on average get paid 41% above women (\$34.8k vs. \$20.5k respectively). This difference is also statistically highly significant (p-value= 0.0000). The latter could be derived from the type of positions that men have within the sector, where men might be in higher paying roles, which would have to be further explored.

For the Artistic & Creative segment there are no significant statistical differences in the average income between men and women.<sup>15</sup>



<sup>15</sup> P-value = 0.3075, hence we can't reject the hypothesis that the average income between men and women is the same in the Artistic & Creative segment.

Figure 10 displays the average income by race in the music ecosystem and the rest of the economy (white people vs. Black/African American people vs. people from all other races combined).<sup>16</sup> In both cases, white people earn more than Black or African American people or people of other races and both differences are statistically significant (p-value=0.0000 when referring to the music ecosystem and p-value=0.0001 for the rest of the economy).



### Indianapolis Music Ecosystem Establishments

Figure 11 shows the percentage of the total number of establishments from the music ecosystem in Indiana, located in each county, taken from the County Business Pattern 2017.<sup>17</sup>

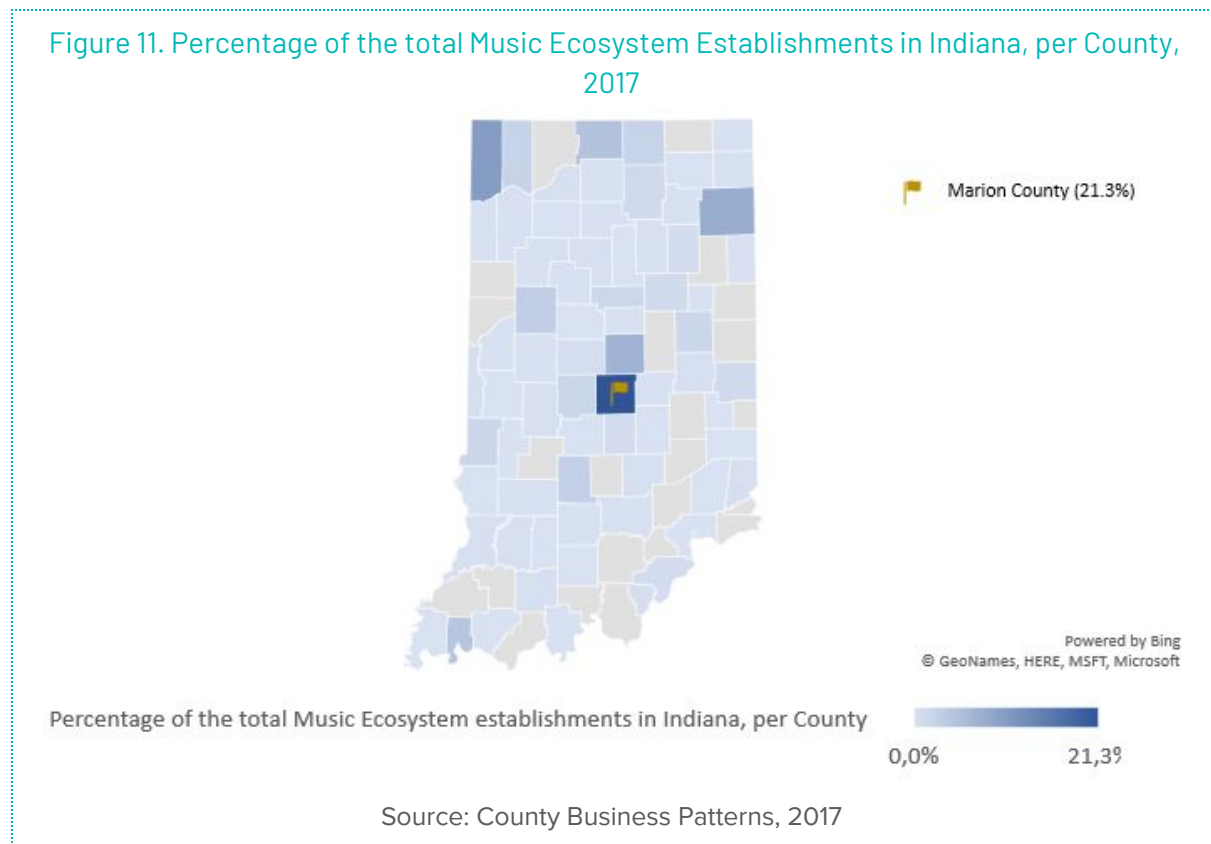
<sup>16</sup> The classification of race is defined as ‘White’, ‘Black/African American’ and ‘Other races’ (which includes individuals who identify as Native American, Alaska Native, Asian, Native Hawaiian, some other races alone or, two or more races) as it appears in the source of information, the U.S. Census’ American Community Survey.

<sup>17</sup> County Business Pattern is an official source of information, however it does not include some establishments that might be classified in the incorrect NAICS (standard to classify economic business activity). To offset the gap, Sound Diplomacy performs a mapping of establishments, visible in the “Music Asset Mapping” section.



The darker the color of the area, the higher the percentage of establishments in that specific county, within the total establishments in the state. For the grey colored counties there is no data available.

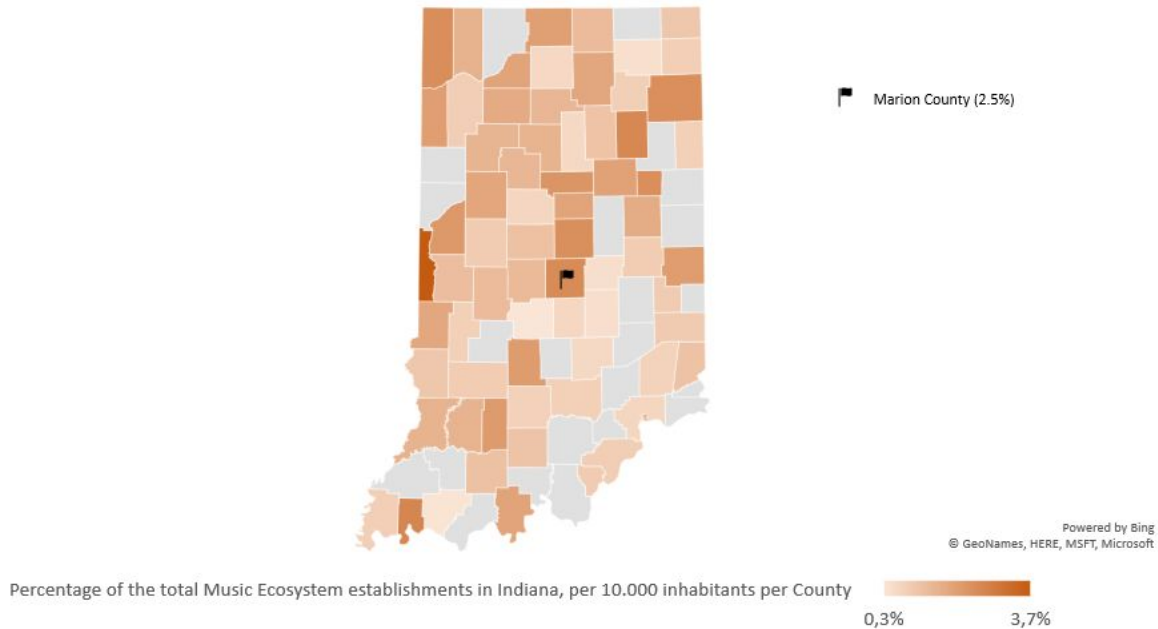
Out of the 71 Indiana counties with available data, Marion County ranks #1, having 21.3% of the total establishments in the state. The counties that follow Marion with the highest percentage of establishments are Lake County (10.6%), Allen County (8.1%), Hamilton County (7%) and St. Joseph County (4.9%). This shows that Marion county has double the percentage of establishments in the music ecosystem compared to the county that follows it in the ranking.



When looking at the total number of establishments per 10,000 county inhabitants, the distribution of establishments changes. Using this indicator, Marion County falls from #1 to #4, with 2.5% of the total music ecosystem establishments in the state per 10,000 inhabitants. The county with the highest percentage of establishments per 10,000 inhabitants is Vermillion County (3.7%), followed by Vanderburgh (2.6%), Huntington (2.6%) and in fifth place, Lake County (2.4%).

Only Marion and Lake Counties appear in the top five in both rankings.

Figure 12. Percentage of the total Music Ecosystem Establishments in Indiana, per 10.000 inhabitants per County, 2017



Source: County Business Patterns, 2017

## Indirect Impact

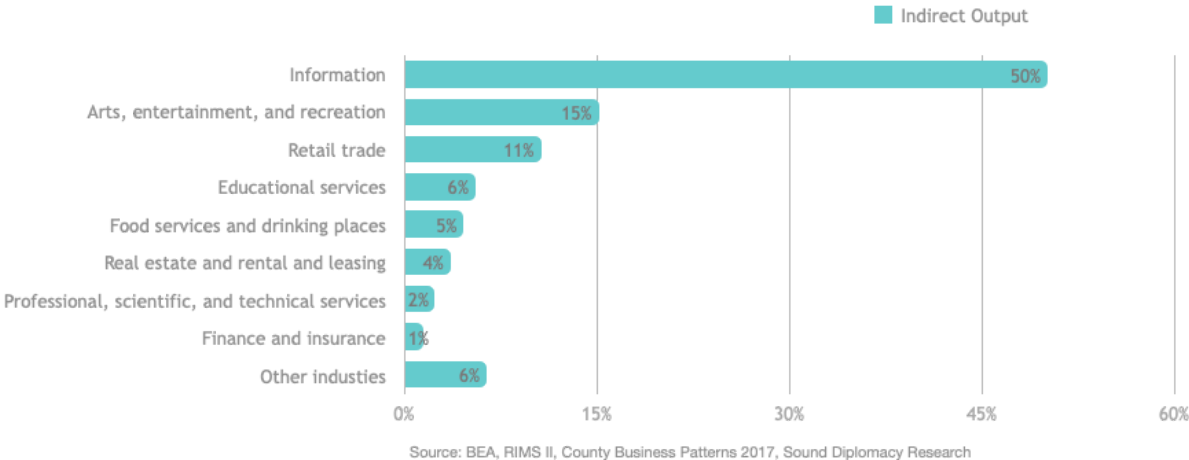
The indirect economic impact is calculated by looking at the changes in the values of output, employment and compensation driven by suppliers of the music ecosystem. It represents the jobs and output generated by local businesses that supply goods and services to the Indianapolis music ecosystem. To calculate it, it is necessary to include the measurement of economic exchanges with suppliers that do not necessarily belong to the music ecosystem, such as advertising, video production, and even legal services, communication and transportation. This process is carried out using the Type I Multipliers, available in the BEA, RIMS II model for 2017.

In 2017, the indirect economic impact of the music ecosystem in Indianapolis reached an output of \$218.4 million, and a GVA of \$134.05. The sum of the indirect earnings (compensation) reached \$52.8 million. At the same time, it is estimated that 1,384 jobs were indirectly supported by the music ecosystem in 2017.

To give an idea of the size of the indirect effect of the music sector on the local economy, it was estimated that \$1,000 dollars of output from the music sector are indirectly supporting \$271.8 of the output of other industries in the city.

Using RIMS II multipliers, it was possible to calculate the input and employment breakdowns of the industries impacted indirectly by the music ecosystem. It was estimated that 50.1% (\$109 million) of the indirect output effect of the Indianapolis’ music ecosystem impacted the information sector<sup>18</sup>, 15.1% (\$33 million) impacted the Arts Entertainment and Recreation sector, 10.7% (\$23 million) impacted retail trade and 5.6% (\$12 million) impacted the Educational Services sector (see figure 13).

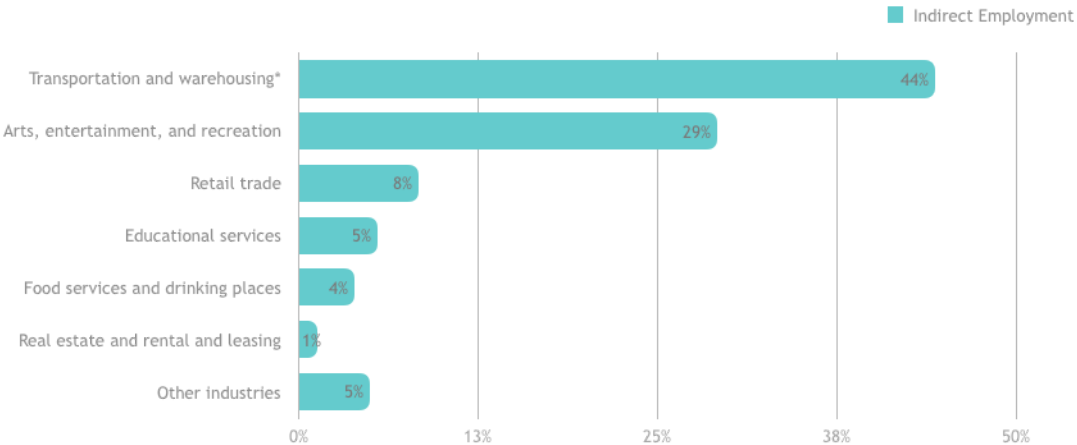
Figure 13. Indirect Impact Output Breakdown, 2017



<sup>18</sup> The main components of this sector are the publishing industries, including software; motion picture and sound recording industries; broadcasting industries, telecommunications industries; Web search portals, data processing industries, and the information services industries.

When assessing the breakdown of indirect employment, 44% (403 jobs) of the indirect jobs belonged to the transportation and warehousing sector, 29% (116 jobs) to the arts, entertainment and recreation sector, and 5.5% (76 jobs) to the education sector, among other sectors (see figure 14).

Figure 14. Indirect Impact Employment Breakdown, 2017



Source: BEA, RIMS II, County Business Patterns 2017, Sound Diplomacy Research

**Induced Impact**

The induced economic impact is the economic value (output, compensation and employment) derived from “the spending of workers whose earnings are affected by a final-demand change, often called the household-spending effect.”<sup>19</sup> In other words, this impact is derived from the spending of workers whose wages are supported directly and indirectly by the Indianapolis music ecosystem. This includes, for example, the money they spent on services, food, entertainment, transportation, etc. The induced output of the music ecosystem in the

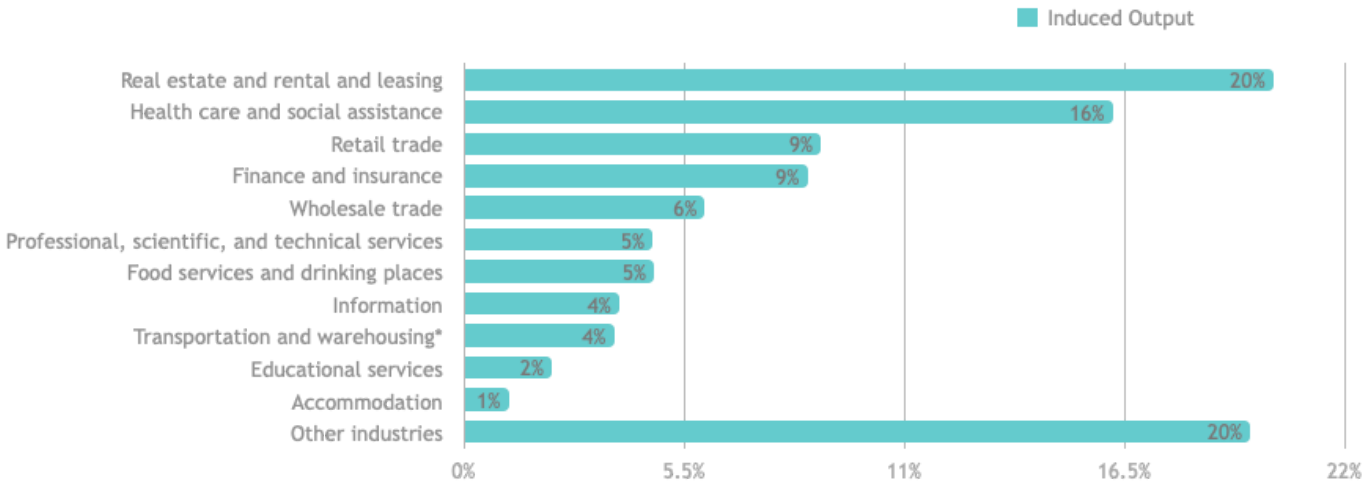
<sup>19</sup> RIMS II: An essential tool for regional developers and planners, page 53.

region reached \$177.85 million, a GVA of \$108.36 million in 2017 and supported 1,157 jobs, with a compensation of \$3.35 million.

The data shows that \$1,000 of the music ecosystem output is generating an induced effect of \$221.3 dollars on different industries of the economy. According to the calculations, 20.2% (\$35 million) of the induced output goes to the Real Estate sector, 16.2% (\$28.8 million) to the health care and social assistance sector, and 8.6% (\$15.3 million) to the finance and Insurance sector (see figure 15).

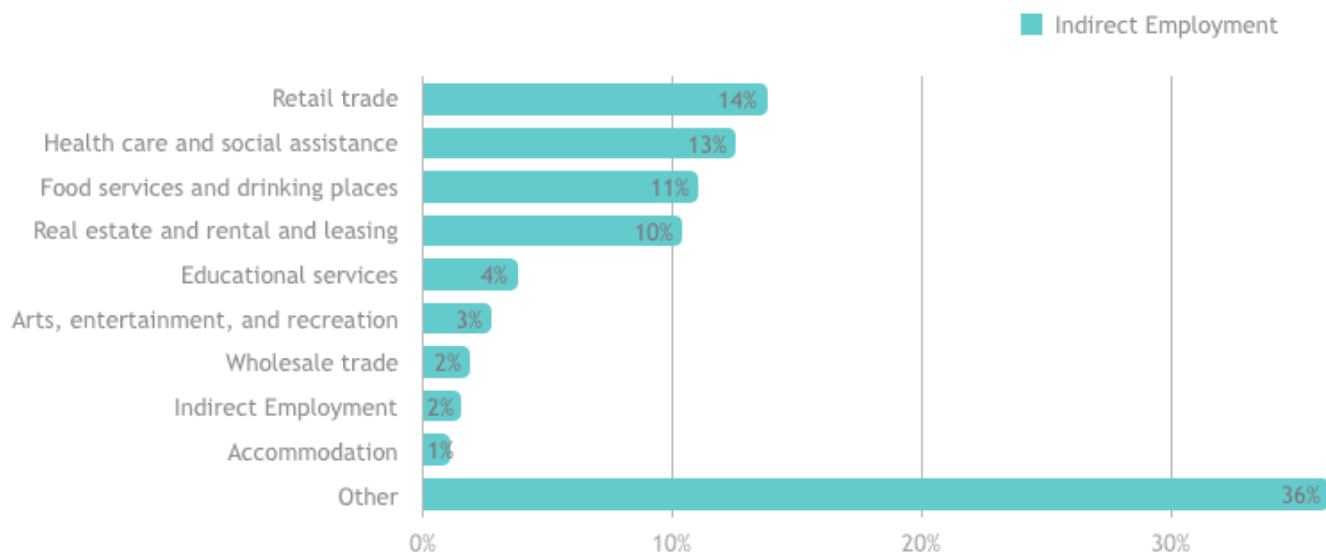
At the same time, induced employment is mainly impacting the sectors related to the typical households consumption sectors, such as retail trade 14% (160 employees) , health care 13% (146 employees), food services 11% (128 employees), and real estate and leasing 10% (120 employees) (see figure 16).

Figure 15. Induced Impact Output Breakdown, 2017



Source: BEA, RIMS II, County Business Patterns 2017, Sound Diplomacy Research

Figure 16. Induced Impact Employment Breakdown, 2017



Source: BEA, RIMS II, County Business Patterns 2017, Sound Diplomacy Research

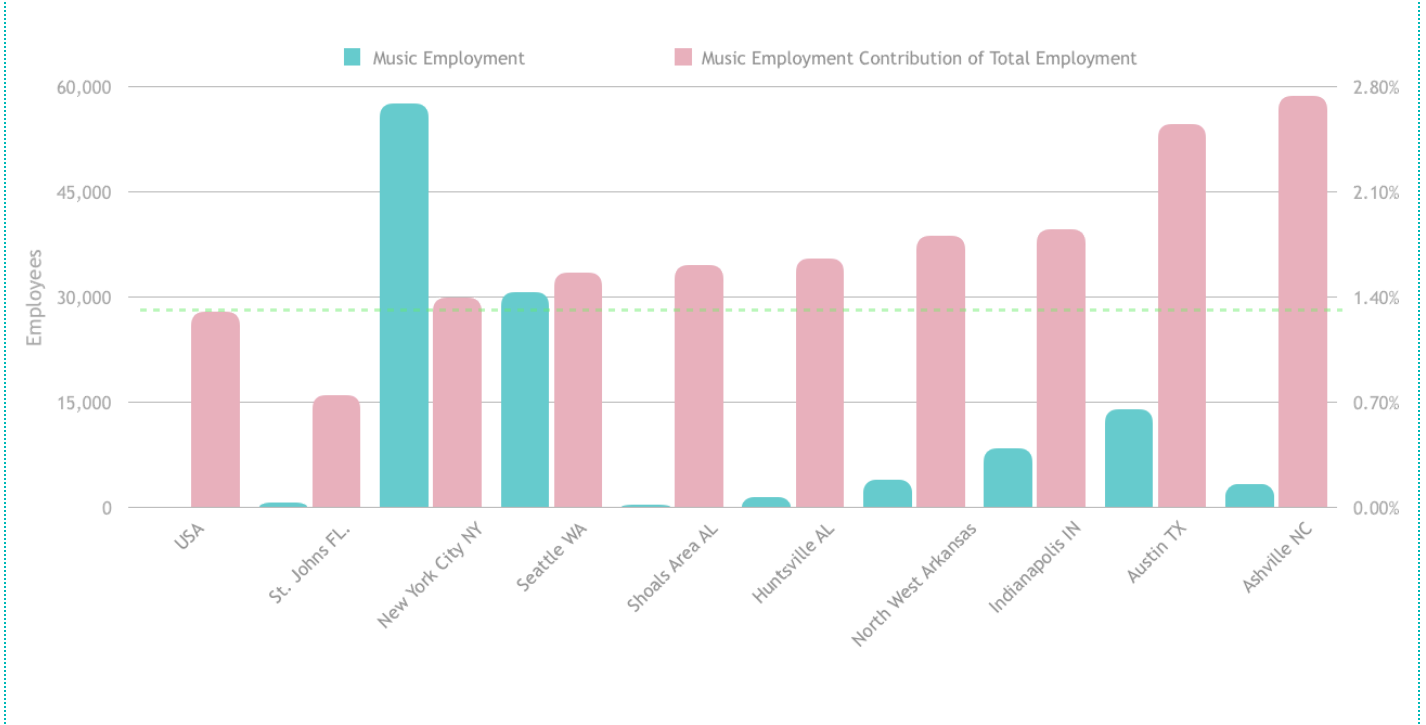
## Indianapolis In Comparison

A variable that allows for comparing the development of the music ecosystem in different cities is the contribution of music employment to the local economy. This variable is represented in Figure 17 for cities that also have music economic impact reports.<sup>20</sup>

In the case of Indianapolis, the music sector generates and supports in total 1.86% of the city's employment, a bigger figure when compared to the 1.3% contribution of music to national employment levels. Nevertheless, Indianapolis is still far below places with well recognized music industries, such as Austin or Asheville, where the music sector generates and supports 2.55% and 2.74%, respectively, of the local employment (figure 17).

<sup>20</sup> The figures in the graph come from different sources that used different methodologies. Furthermore, their measurements do not correspond to the same year. However, they could be a point of reference for comparing the dimension of the music sector in the different locations. The sources are: TXP, Inc. (2016); Asheville Area Chamber of Commerce (2016); The Boston Consulting Group, Inc. (2017); Musicians' Association of Seattle (2015); and Siwek, Stephen E. (2018).

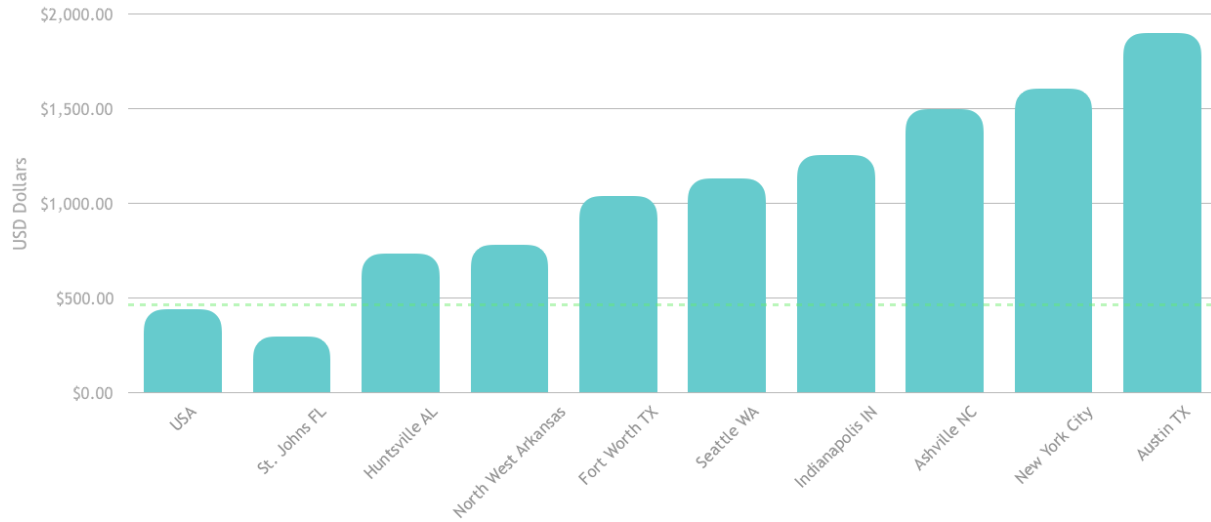
Figure 17. Music Ecosystem Employment, US Cities



Furthermore, making use of previous music ecosystem reports, we were able to calculate the music output per capita in each location. This variable is calculated by dividing the output of the music sector by the total number of residents in the city.

The music output per capita allows us to identify the level of industrial development of the sector, since it represents the economic resources generated according to the size of the population of a city or region. The music output per capita of the United States is \$444, while in Indianapolis this figure reaches \$1,257. In the case of cities such as Austin and New York, which have high flows of music tourism and strongly consolidated industries, this figure is \$1,899 and \$1,604, respectively (figure 18).

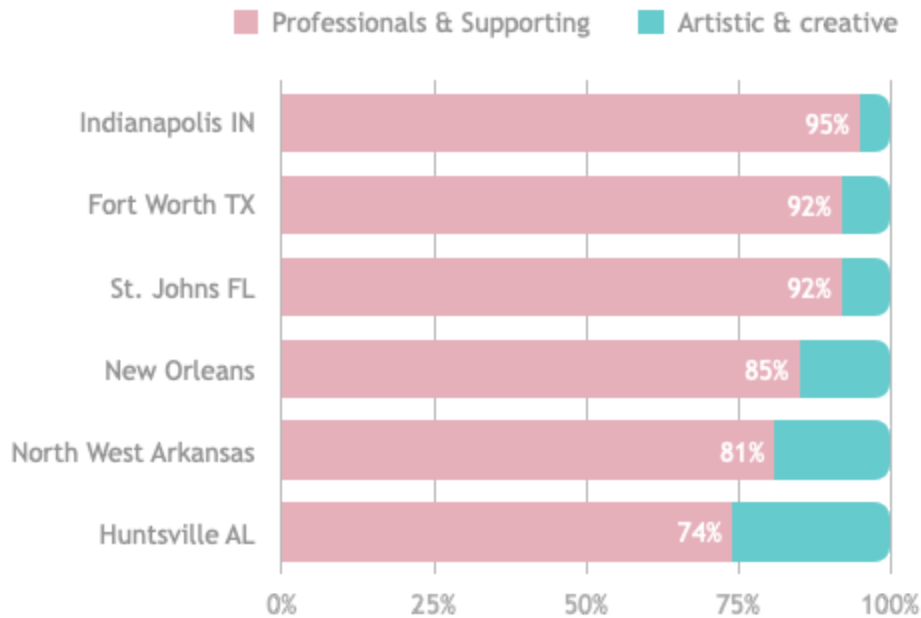
Figure 18. Music Ecosystem Output Per Capita, Comparator



Compared to the other cities, the output of the Professional & Supporting segment of the music ecosystem surpasses that of the Artistic & Creative segment in Indianapolis by a higher percentage. The output of the Professional & Supporting segment represents 95% in Indianapolis, while in Huntsville (AL) it represents 74%, in Northwest Arkansas and the Shoals Region (AL), it represents around 80%, while in Huntsville reaches 74% (Figure 19).



Figure 19. Music Ecosystem Output by Segment, Comparator



Source: American Community Survey 2017, County Business Patterns 2016 - 2017, Sound Diplomacy Research

### Estimations of the Covid-19 Crisis impact on Indianapolis' Music Economy

The entertainment and night-time economy sectors have been some of the most affected by the COVID-19 pandemic. Therefore, we decided to estimate some of the effects of the pandemic on the music ecosystem in Indianapolis with the information available as of late April 2020. It should be noted the following are estimated projections since the latest economic information from official sources is from 2017. Actual losses could be greater due to an increased number of festivals or events planned (now canceled/rescheduled) compared to previous years.

Based on the 2017 economic impact calculations and the employment data from the Quarterly Census of Employment and Wages (QCEW), we estimate the number of direct jobs in the Indianapolis music economy in 2020 (prior to the COVID-19 pandemic outbreak) had reached 6,058 and the economic output of the music ecosystem added up to \$821 million.

Based on the aforementioned figures, we calculated that the outbreak is currently affecting around 48% (2,908) of employees in the music ecosystem as of the end of April 2020. Of

these, we estimate that 21% professionals (637 people) work in the Artistic & Creative segment of the music ecosystem, while 79% of the professionals affected (2,272 people) work mainly in the Live Music sub-sector of the Professional & Support segment.

If the closure of the businesses affected by social distancing lasts for 6 months in total (i.e. reopening in September), by the end of it the Indianapolis music economy will have lost \$78 million of its output, and the losses in employees' compensations (wages) could add up to \$25 million.

Indianapolis' live music sector has a newly created industry nonprofit organization that provides resources, education and emergency relief during this difficult time – the Indiana Independent Venue Alliance (IIVA), formed of Indiana-based independent concert venues, music festivals and live music promoters.<sup>21</sup> IIVA organized a streaming fundraiser on May 17 to help support Indiana venues through donations and merchandise sales which raised \$52,000.<sup>22</sup>

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<sup>21</sup> Tribune Star (2020)

<sup>22</sup> Indiana Independent Venue Alliance (2020)

# Music Asset Mapping

Disclaimer: This research was last amended on January 28, 2020, before the Covid-19 pandemic unfolded.

## Mapped Assets Overview

Our extended mapping of the music assets in Indianapolis has identified the following:<sup>23</sup>

### MUSIC PLACES

- **35 Bars, cafes and restaurants with live music** where performances are complementary to the main business of selling beverages and/or food to patrons
- **30 Multi-purpose venues** where live music is part of a larger cultural and events program (e.g. theatres, art centers, amphitheaters)
- **21 Occasional venues** hosting live music at least a couple of times a year (e.g. parks, sports arenas, open air grounds, public places)
- **17 Nightclubs** with regular music programming
- **13 Live music venues** purposefully built with permanent stage and equipment, and open only for concerts.

### FESTIVALS

- **34 Festivals** with live music programs

### MEDIA

- **34 Radio stations** based locally

### MUSIC INDUSTRY

- **87 Record labels & Publishers**
- **75 Music retail spaces** including record stores, instrument shops, etc.
- **52 Recording studios**

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<sup>23</sup> See the appendix for the full list of mapped assets per category.

- **36 Non-profit organizations** focused on music
- **15 Co-working spaces**
- **14 Booking agents & Live Music Promoters**
- **14 Other music businesses** (e.g. music therapy, music marketing, etc.)
- **9 Technical producers** for concerts
- **7 Rehearsal spaces** (including studios available for rehearsal)

## MUSIC EDUCATION

- **116 Music choirs** including church choirs, school choirs and independent choirs/chorales
- **87 Junior bands**, orchestras and ensembles.
- **83 Schools with music programs**
- **55 Music schools** including art schools, music academies, music instructors and organizations providing music lessons
- **46 Adult bands, orchestras and ensembles** including orchestras and concert bands connected to universities and other organizations

Our previous research indicates that these numbers are competitive across all categories when compared to similar regions. Specifically in terms of independent record labels and music venues, Indianapolis has a very strong offering. The tables below outline the number of assets in Indianapolis, and compare that to Atlanta Metro Area, Nashville, Greater New Orleans and San Francisco.

Table 5. Number of assets per capita in the City of Indianapolis (100,000 pc) and comparison cities/areas

24

ASSET	Asset pC Indianapolis	Asset pC Nashville <sup>25</sup>	Asset pC Atlanta Metro Area <sup>26</sup>	Asset pC Greater New Orleans <sup>27</sup>	Asset pC San Francisco <sup>28</sup>
Music Venues	13.4	15.2	1.3 <sup>29</sup>	10.3	10.9
Music Festivals	3.9	2.9	0.4	10.4	5.5
Recording Studios	6	10.9	1	4.5	5.0
Record Labels	10	3.2 <sup>30</sup>	0.4 <sup>31</sup>	0.3	1.1

Table 6. Actual number of assets in Indianapolis and comparison cities/areas

ASSET	Indianapolis	Nashville	Atlanta Metro Area	Greater New Orleans	San Francisco
Music Venues	116	105	75	132	97
Music Festivals	34	20	23	133	49
Recording Studios	52	75	60	59	45
Record Labels	87	22	25	19	10

<sup>24</sup> Unless stated otherwise, data source has been Sound Diplomacy's own mapping research and data scraping tool.

<sup>25</sup> Population: 691,243

<sup>26</sup> Population: 5,949,951

<sup>27</sup> Population: 1,270,000

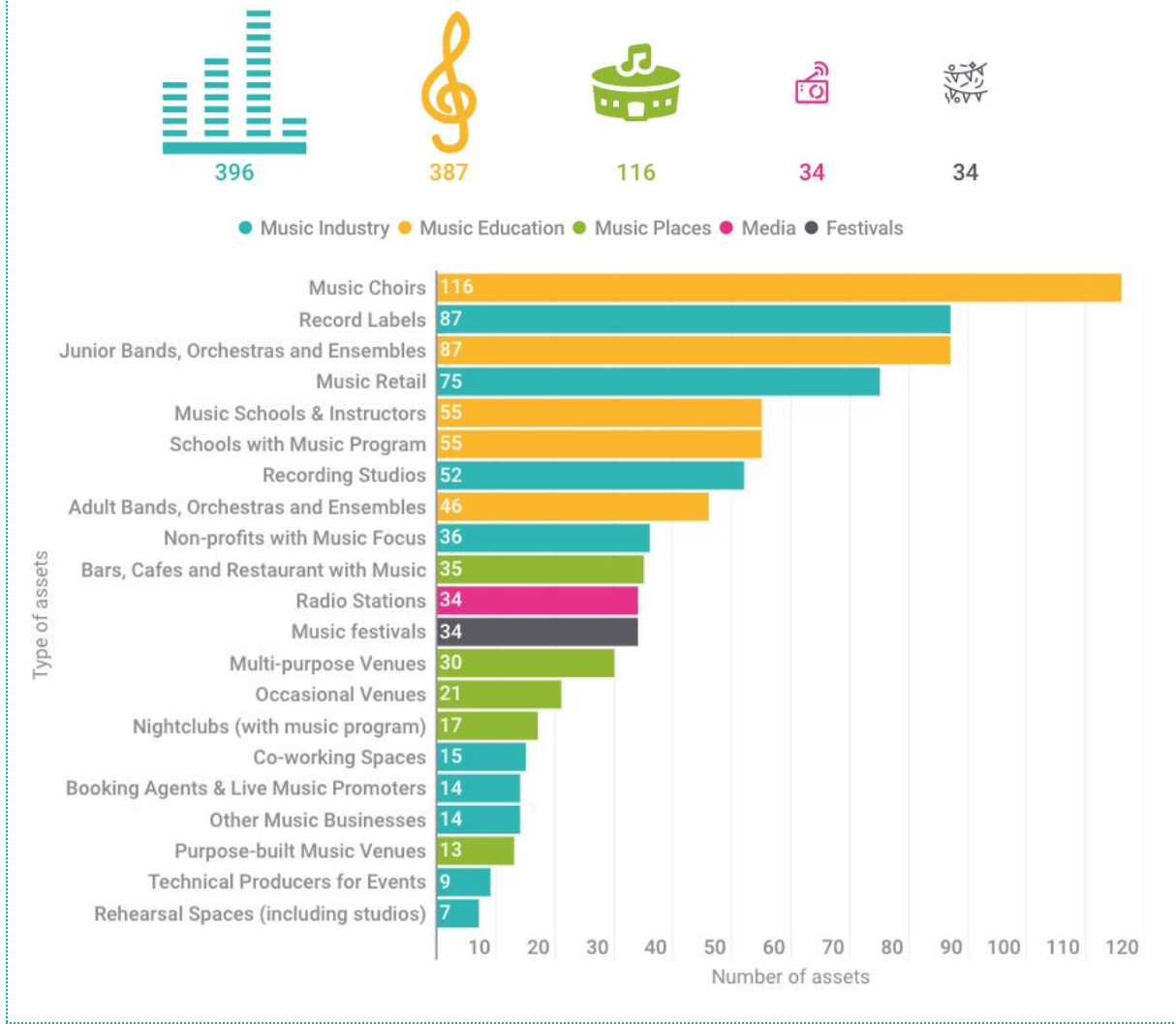
<sup>28</sup> Population: 884,363

<sup>29</sup> Source: <https://www.atlantamusicguide.com/more-content/atlanta-venues/>

<sup>30</sup> Source: Wikipedia

<sup>31</sup> Source: Wikipedia

Figure 20. Overview of music assets in Indianapolis<sup>32</sup>



## Mapping Findings

At the moment, there is no unified directory or database featuring all of Indianapolis’ music businesses. This was particularly challenging for obtaining additional information on music venues, including their capacity, characteristics, genre focus, and backline. Sound Diplomacy collected information on the capacity and programs of local music venues manually, using publicly available data and direct outreach where contact information was provided.

<sup>32</sup> Source: mapping tool, Sound Diplomacy research

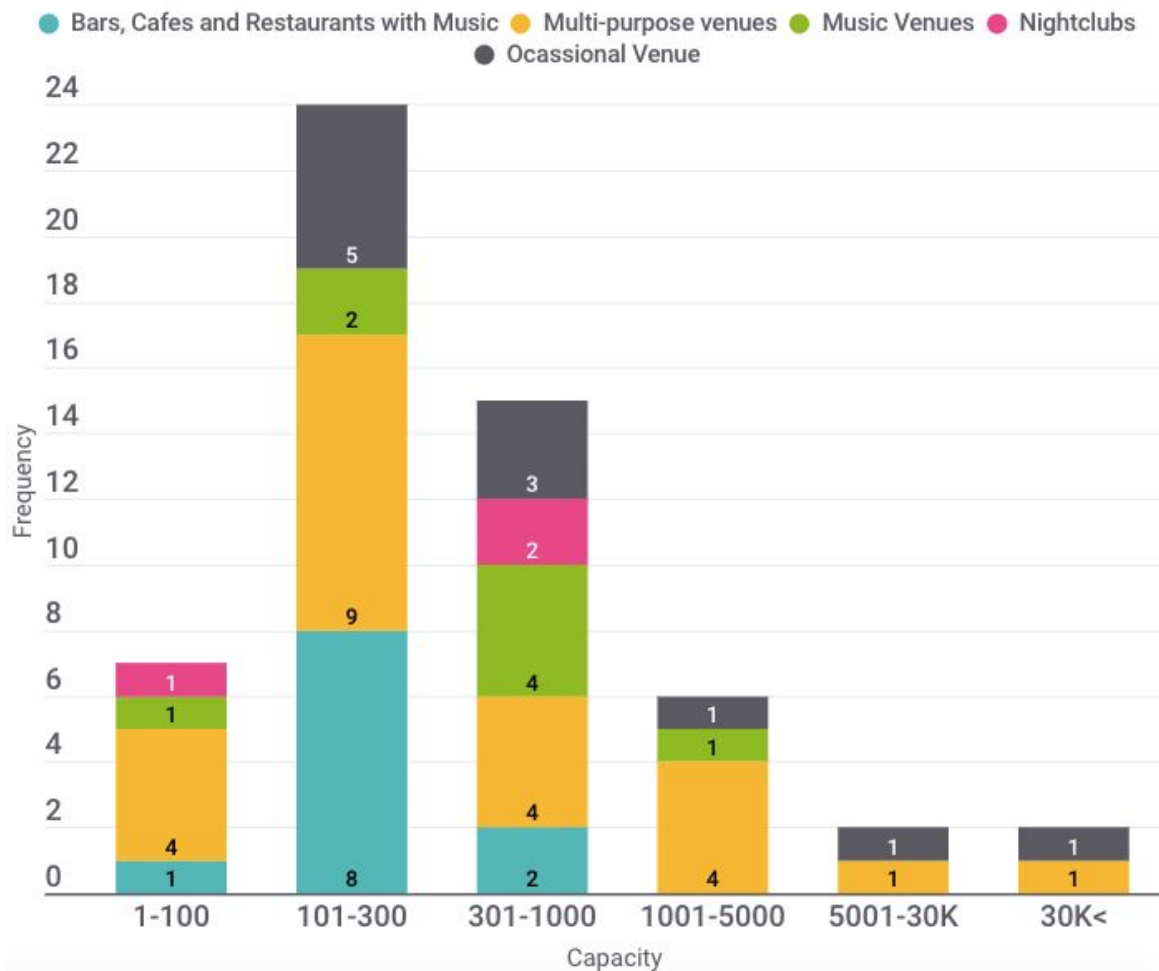
The variety of Indianapolis' grassroots music venues creates the perfect playing field for artists who are starting out and for audiences who prefer intimate venues, featuring a wide range of music spaces to choose from with up to 1,000 capacity. We have mapped at least 35 cafés, bars and restaurants and 30 multi-purpose venues catering to all types of music genres, including rock, folk, jazz, blues, classical, country, gospel, hip hop, pop, dance, electronic and experimental music.

The 13 purpose-built music venues identified in the mapping focus on one style of music and tend to support more touring acts than local acts within that genre. Venues with large capacity (5,000 and larger) are mainly multi-purpose and occasional venues. These are a staple in the Midwest music circuit, routing national and international acts to Indianapolis and mainly excluding local acts from performing as headliners. Music festivals (34), on the other hand, are smaller in number and size, indicating there is still room for growth in the music festival economy and the music tourism sector.

Since the mapping has only identified 14 independent booking agents and promoters, a venue directory containing the names, technical specifications and contacts for every space would eliminate entry barriers for touring and local artists who want to perform in Indy, encouraging more concerts outside of the current gatekeeping process. Phase III of the Indy Music Strategy will address this in the recommendations.

Only 49% of the venues mapped had their capacity information publicly available and/or Sound Diplomacy was able to retrieve it. Figure 21 shows their capacity and characteristics:

Figure 21. Capacity of mapped venues in Indianapolis<sup>33</sup>



Even though the mapping identified 87 independent record label operations locally, further desk research on each individual label gave insight on their lack of appropriate marketing, including unclear or vague information on artist roster and/or catalog, and poor online and social media presence, amongst almost 3 out of 4 labels. This relates to a gap in marketing skills and the availability of artist support teams, a core challenge addressed in section 6 of this report, Strategic Opportunities.

Indianapolis stands out with a large number and variety of music education opportunities and community-building assets such as music programs in schools, music schools and instructors,

<sup>33</sup> Source: mapping tool, Sound Diplomacy research



bands, orchestras and ensembles, mainly targeting children and youth under 18 years old. Music education assets in Indianapolis are highly influential in shaping Indy's future artists, music professionals and audiences, but qualitative research collected in the study shows they are particularly vulnerable to changes in public funding and philanthropic support. This is particularly true for the 83 music programs in schools and the 87 youth bands, orchestras and ensembles mapped.

Lastly, the offer diversity in radio stations (34), and particularly in music retailers (75), indicates a wide base of consumers interested in music who also support local businesses in the case of stores. The local resilience of music retailers is a positive indicator for Indy's music economy, considering the current decline of the physical retail sector and the weight of streaming and digital music consumption in the music industry. Stage 3 of the Indy Music Strategy will pay close attention to supporting independent organizations that promote the development of local artists.

## Distribution of Music Assets

All the mapped assets are visible, embeddable and shareable using Google Maps. Figures 22, 23 and 24 below are screenshots of the online maps provided for reference, but please use the following links to zoom in the different areas, filter assets per category and see assets' names, categories and addresses:

- Live Music Assets: <http://bit.ly/IndyMusicMapLive>
- Music Industry Assets: <http://bit.ly/IndyMusicMapIndustry>
- Music Education Assets: <http://bit.ly/IndyMusicMapEducation>

Sound Diplomacy examined the distribution of mapped music assets and the current zoning applied to music spaces using the online tool Indianapolis Zoning Check.<sup>34</sup> In general, the majority of music assets are concentrated in Downtown Indianapolis and the neighborhoods and communities North of Downtown, with some exceptions in suburban communities South of Downtown.

Our mapping depicts the geographical dispersion of spaces presenting live music outside of Downtown and the main entertainment and cultural districts. This finding reinforces comments during roundtables and in survey responses on the long journeys between music activities

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<sup>34</sup> City of Indianapolis (2020)

and personal residences. Although this disposition can challenge people traveling to shows, it also ensures music spaces can continue to exist, especially since Indianapolis does not have a noise ordinance or policy specifying sound limits in entertainment spaces regardless of their location.

Looking at zoning for Nightclubs and Indoor Entertainment Venues, there are several areas that could potentially disrupt music activities if more residents are moving in, particularly in Downtown Indianapolis where most of the venues, nightclubs and events are located. Phase III of the Indy Music Strategy will propose measures to address this situation and avoid the escalation of noise-related conflicts in these music activity hubs.

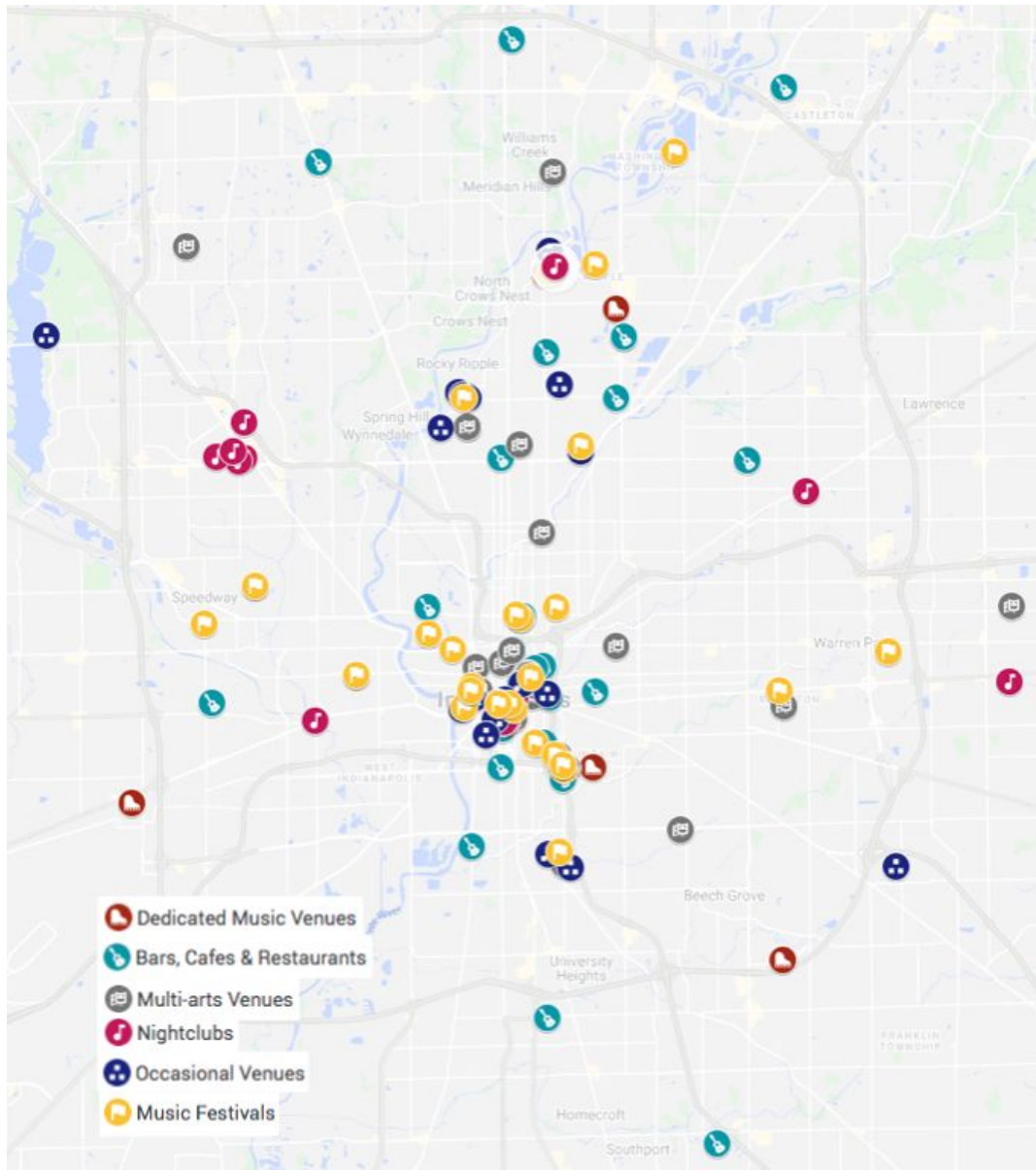
We used the category “Live/Work Unit” to compare the geographic distribution of recording studios and the rest of music industry assets, as there is no specific use category in current zoning. Most of the recording studios are located in Downtown Indianapolis and the North part of the city, creating distinctive industry clusters such as Binford Avenue (7 businesses and recording studios cluster in a mall strip by E 65th St and studios near Devonshire), and another in Broad Ripple and E 62nd Street where mixed music businesses are also located.

Although there are clusters of music retailers alongside mall strips and retail areas, most are disseminated across the city, and most residents have a music retailer within a 10-minute drive. Commercial areas around Castleton concentrate several types of music business outside of downtown, such music stores, radios, music businesses and recording studios.

School zoning is the most widely allowed of all the music categories and assets mapped in Indianapolis. The geographic dispersion of music education assets is bound by school districts, determining how many music schools (excluding private tutors) are in a given area. Same as with music businesses, most of the music education offer concentrates North of Downtown, with less music education assets in Downtown Indianapolis compared to live music spaces and music industry assets, and a sparse presence in the city’s South and West.

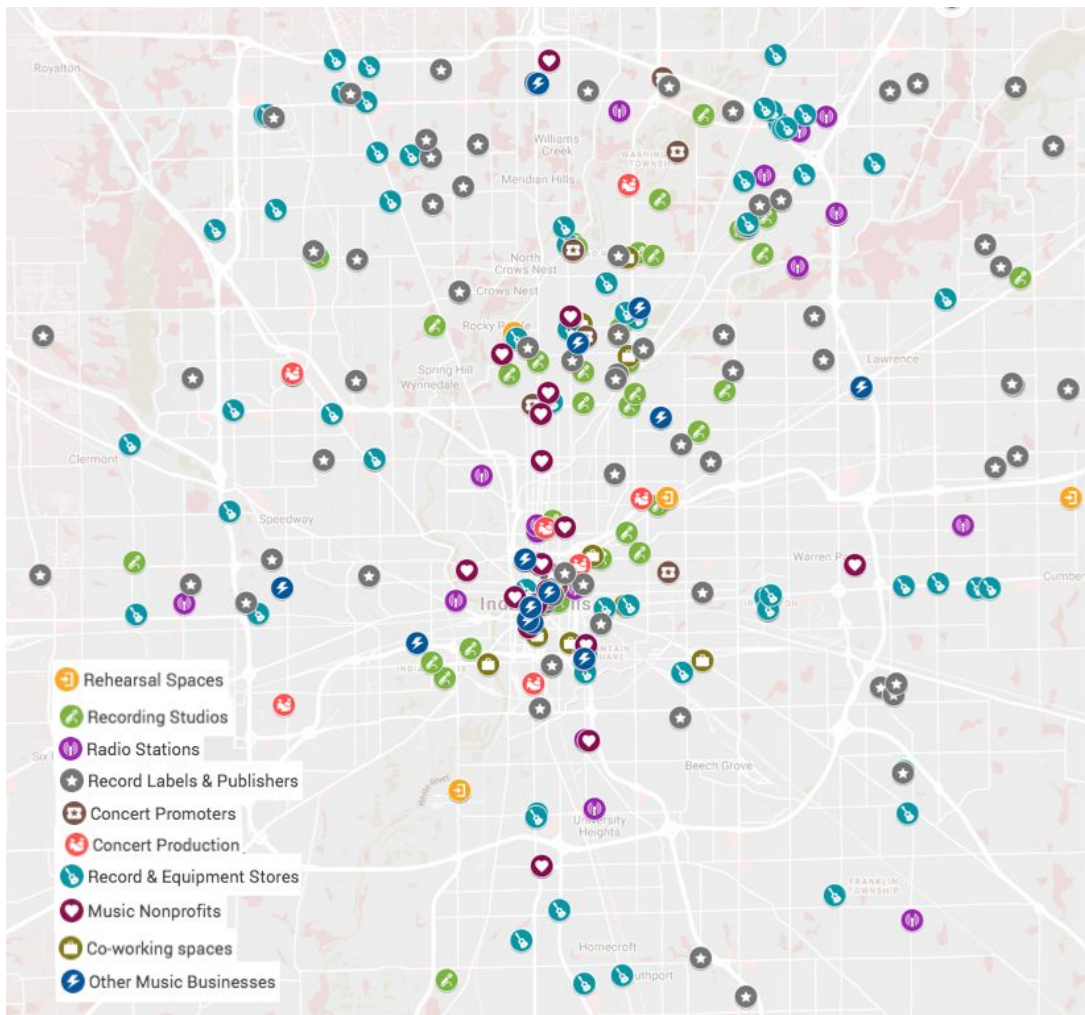
The regulatory assessment in Phase I identified only 3 major universities offering a music degree in Indy (Butler University, University of Indianapolis, Marian University), while 11 universities nearby in Indiana (not mapped) offer an equivalent or more diverse offer of music degrees than Indianapolis.

Figure 22. Live music assets mapped in Indianapolis<sup>35</sup>



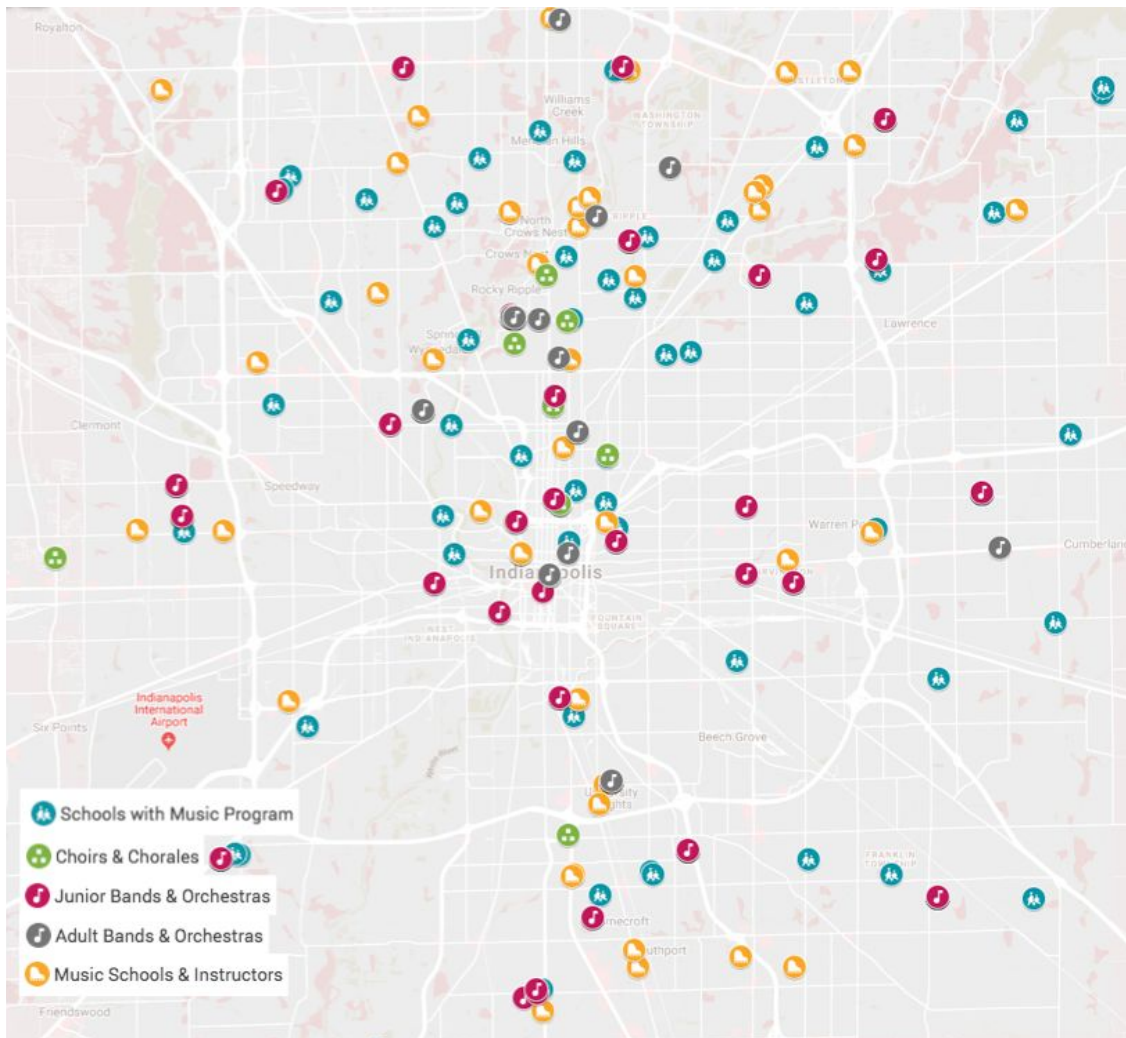
<sup>35</sup> Source: mapping tool, Sound Diplomacy research

Figure 23. Music industry assets mapped in Indianapolis<sup>36</sup>



<sup>36</sup> Source: mapping tool, Sound Diplomacy research. An exception without Indy postcode, concert promoter IndyMojo (Fishers), has been included for its involvement in the Indy Music Strategy.

Figure 24. Music education assets mapped in Indianapolis<sup>37</sup>



<sup>37</sup> Source: mapping tool, Sound Diplomacy research

# Regulatory Assessment Snapshot

Disclaimer: This section reflects the most recent figures available as of February 2020. Please note this research precedes the COVID-19 outbreak and the results from the 2020 U.S. Census.

To unlock greater potential for growth of music in Indianapolis, the city must revise the policies that inhibit the growth of its music and culture and introduce new, smart ordinances that offer protections and support for musicians, including protecting live music venues and other premises. Below is a snapshot of strengths and challenges related to the regulatory assessment.

## City Statistics

Population (Indianapolis City): 867,125 <sup>38</sup>	Population (Indianapolis-Carmel-Muncie, IN): 2,431,361 <sup>39</sup>
Median Age: 34.1 <sup>40</sup>	Sex ratio: 51.8% female
Ethnicity: White (61.4%), Black/African American (28.3%), Asian (3.2%), multiracial (3.2%), American Indian and Alaska Native (0.3%). Persons of Hispanic or Latino origin, of any ethnicity (10.2%) <sup>41</sup>	Unemployment rate (Indianapolis Area): 2.9% <sup>42</sup>
Per Capita Income: \$27,119 <sup>43</sup>	Median Household Income: \$46,442 <sup>44</sup>
Persons with a High School Diploma or Higher: 85.5% <sup>45</sup>	Persons with a Bachelor’s Degree or Higher: 30.4% <sup>46</sup>

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<sup>38</sup> U.S. Census Bureau (2020a)  
<sup>39</sup> Stats Indiana (2020)  
<sup>40</sup> U.S. Census Bureau (2020a)  
<sup>41</sup> U.S. Census Bureau (2020a). When combining all ethnicities, the percentages provided by the source do not add to 100%  
<sup>42</sup> U.S. Bureau of Labor Statistics (2020)  
<sup>43</sup> Ibid.  
<sup>44</sup> Ibid.  
<sup>45</sup> Ibid.  
<sup>46</sup> Ibid.

Households with a Broadband Internet Subscription (2013-2018): 76.5% <sup>47</sup>	Number of Companies: 69,366 <sup>48</sup>
Major Employers: St. Vincent Hospitals, IU Health, Eli Lilly & Co, Community Health Network, State & Local Government. <sup>49</sup>	Cost of Living index: 92.5 (100 = US average) <sup>50</sup>

Indianapolis is the state capital of Indiana and the economic driver of both the state and Marion County. The capital registered record figures of economic success in 2019 with the attraction of \$2.6 billion in capital investment and the retention and/or addition of over 8,700 jobs.<sup>51</sup> Overall, Indianapolis nonfarm jobs reached 1,084,500 in December 2019, a 0.5% growth compared to the previous year. The area with the biggest employment growth between December 2018 and December 2019 was Construction (+4.4%, at 54,200 jobs), and the most losses were registered in Other services (-6.7%, at 43,500 jobs).<sup>52</sup>

Furthermore, Indy ranked #38 in the 2019 U.S. News ranking of Best Places to Live in the USA,<sup>53</sup> highlighting its recreational outdoors and sports culture, affordability and employment opportunities. Although the review is largely positive, the ranking also highlights the city's higher crime rates compared to similar US cities. With 694.5 violent crimes per 100,000 people in 2017, it is more dangerous than peer cities Orlando, FL (443 crimes/100,000 people); Charlotte, NC (416 crimes/100,000 people) and Portland, OR (283 crimes/100,000 people).<sup>54</sup> An estimated 19.1% of Indianapolis residents live below the poverty level.<sup>55</sup> Average weekly wages in Marion County are \$48 higher than the U.S. average at \$1,232/week.<sup>56</sup>

The walkability and cultural offer of the city is an added value to visitors and the quality of life of Indy residents, boasting a diverse scene in the culinary, sports and live entertainment sectors. The city was shortlisted to host Amazon's new second US headquarters alongside larger metropolitan areas, highlighting future development and collaboration possibilities between the Indy region and the state of Indiana.<sup>57</sup>

<sup>47</sup> Ibid.

<sup>48</sup> U.S. Census Bureau (2020b)

<sup>49</sup> Indy Chamber (2020a)

<sup>50</sup> Indy Chamber (2019b)

<sup>51</sup> Indy Chamber (2020c)

<sup>52</sup> U.S. Bureau of Labor Statistics (2020)

<sup>53</sup> U.S. News & World Report (2020)

<sup>54</sup> Ibid.

<sup>55</sup> U.S. Census Bureau (2020a)

<sup>56</sup> U.S. Bureau of Labor Statistics (2020)

<sup>57</sup> Indy Chamber (2020d)

Sports play a big role in the city's economy and tourism sector. Indianapolis boasts national sports institutions such as the Indy 500, the NCAA and other college sports-related assets and is home to major national teams such as the Indianapolis Colts and the Indiana Pacers. It also hosted the Super Bowl in 2012, and will host the NBA All-Stars Weekend in February 2021. But at the highest sports rung, the city is known as the Racing Capital of the World thanks to the Indianapolis Motor Speedway and its racing events. Over 500,000 attendees participated in the 50 events that are part of Indy's 500 Festival of sports and entertainment,<sup>58</sup> which is estimated to generate an economic impact of \$600 million. There are several music activities complementing the event, such a concert series dedicated to a different genre every day (rock, country, EDM) with prices starting at \$30/day for concerts and \$90 for bundles of the Indy 500 race and one day of concerts. The Purdue University marching band also celebrated its 100th performance at the Indy 500 in 2019.<sup>59</sup>

## Overview of Regulatory Assessment Findings



### Strengths:

- Indianapolis has a brand name currently well-known in the sports sector, and this could set a foundation to build partnerships and create a music city identity. It has so far excelled at “big picture” achievements like developing and attracting large sports events such as the Indy 500, the Super Bowl 2012 and the All-Stars Weekend 2021 and has set its mark to mirror this success in the music sector.
- The city is currently in the process of developing a software-based special events tool and online Special Events Portal to help navigate event organizers through the sometimes complicated event permitting processes and costs to hold events in public territories of the city.
- The Downtown Cultural Districts and the Indy Cultural Trail have great potential to showcase the city's music and music heritage in its storytelling. The trail integrates music places in some of the neighbourhoods, such as the Old National Centre and the Madame Walker Theatre Center, but it does not offer a specific route or highlights for music tourists. Visit Indiana also highlights the Indiana Historical Society as part of its Indiana Music Heritage itinerary.

<sup>58</sup> 500 Festival (2019)

<sup>59</sup> Ryan, J. (2019)



- Although there is no music tourism strategy in place, two organizations are leveraging music as a tourism asset: Visit Indy features music places and activities. Its initiative MusicCrossroads brings in music-related tourism through competitions.
- Busking opportunities are available on public property without any permit required if there is no donation requested vocally (signs are allowed). This progressive approach has been positively reinforced with past public programs such as the Downtown Indy Buskers pilot in 2014 and IndyFringe yearly since 2014.
- Indianapolis has a strong music education sector and organizations. Plenty of music education opportunities are available, including school courses, after-school programs, academies and colleges. Although only a handful, there are tertiary education opportunities available in music technology, sound production and music business.
- There is an increased offering of grants for the music sector and other creative industries on a local level, such as the Indianapolis Arts Council (supported through the city budget) art grants and Create Indy’s grants, although it is noted these are not available exclusively for musicians or music organizations.

Table 7. Indianapolis’ policy-related challenges

REGULATORY CHALLENGES	BEST PRACTICE FOR INDIANAPOLIS
Lack of a music office leadership structure bridging the public and private sector and aligning development goals	<b>Nashville’s Music City Music Council</b> is a collaboration between the Mayor’s Office, Chamber of Commerce and Convention & Visitors Corp. Its focus is economic development, working to expand local business while attracting new businesses.
The Dancehall Ordinance hurdles audience development in music and creates additional expenses for music venues. Most venues host exclusively +21 shows.	<b>Milwaukee</b> amended in 2019 its restrictive city codes to make it possible for venues to host all-ages shows and simultaneously serve alcohol to patrons 21 and over.
Limited connectivity of music places and residential areas at night outside of the Red Line bus service	<b>Philadelphia</b> has 24-hour bus lines

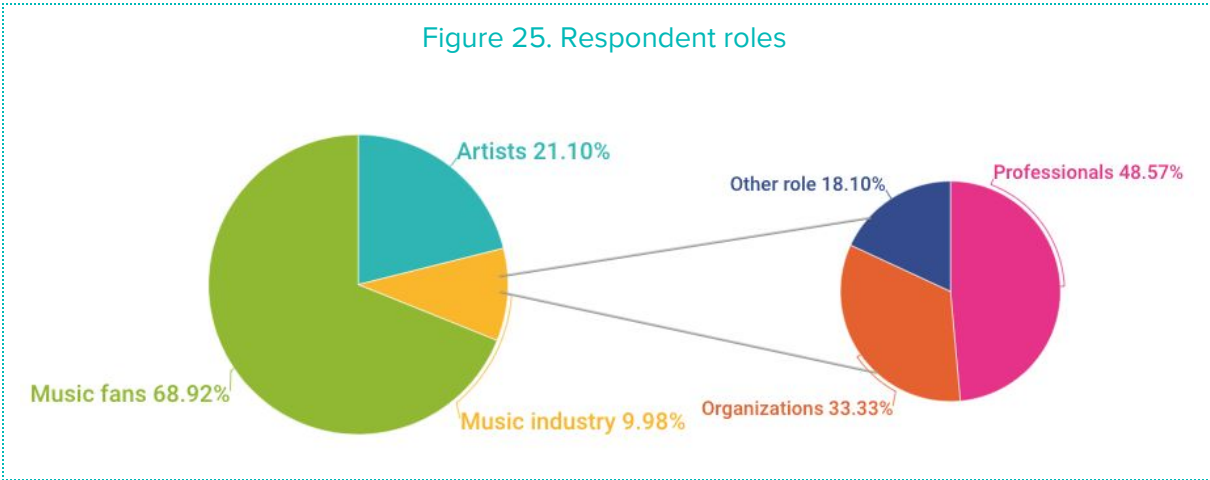
Lack of designated artist parking near music venues	<b>Austin, Seattle and Nashville</b> all have artist loading and unloading zones.
No Agent of Change principle or similar policy to protect new and existing music venues from property development changes	<b>London, San Francisco</b> and the Australian state of <b>Victoria</b> have forms of the Agent of Change principle.
There is a limited number of licences for each county and multiple types of permits available for licensed establishments (\$750-1,000/year). Food must be available at all times and minors are not allowed at bars.	<b>Lafayette</b> offers only a handful of liquor license categories (state and local) to choose from, starting at \$180 for beer only to \$895 for beer and liquor. Its consolidated government website has a specific section to apply for alcohol and noise control permits, clearly explaining the requirements.
Noise laws are imprecise with no dB limit or measurement procedure in place, stating “Unreasonable noise” is forbidden between 10pm and 7am.	The noise ordinance in <b>Austin</b> establishes clear dB limits and curfews in the designated Entertainment Districts. They have pioneered a curfew extension for music venues in their Red River Entertainment district.
Although there are six Cultural Districts branded, there isn’t an Entertainment District defined through special policy.	<b>Austin</b> has 6 entertainment districts, each with unique laws regarding extended curfews for live music outdoors.
No local music tourism strategy for the general public	<b>North Carolina’s</b> <i>Come Hear NC</i> program or <b>Mississippi’s</b> <i>Birthplace of Music</i> Program are comprehensive best practices.
Lack of union for musicians outside of the classical sector and jazz	<b>Musicians Union UK’s Fair Play</b> scheme could be applied to all Indianapolis venues.

# Survey Information

NOTE: The underrepresentation of respondents identifying as Black or African-American, American Indian, Asian and with a Latino/a origin calls for further efforts to better engage, ensure access and represent these demographics in every single step of the Indy Music Strategy. This shortage has been addressed with representatives from the Arts Council of Indianapolis and the Central Indiana Community Foundation, who will support and provide more outreach in future research efforts.

The makeup of respondents is primarily local: 83% of respondents overall are based in Indianapolis, with a similar percentage of representation across roles. 86% of Organizations and Professionals are based in Indy, 83% of Artists are based in Indy and 82% of Music Fans are based in the Indianapolis Metro Area.

Figure 25 shows the distribution of survey respondents' roles in the Indianapolis music ecosystem, most of them audience members:



Below is an overview of the survey population and socioeconomic findings. Additional insights by topic also incorporated in section 6 'Strategic opportunities'.

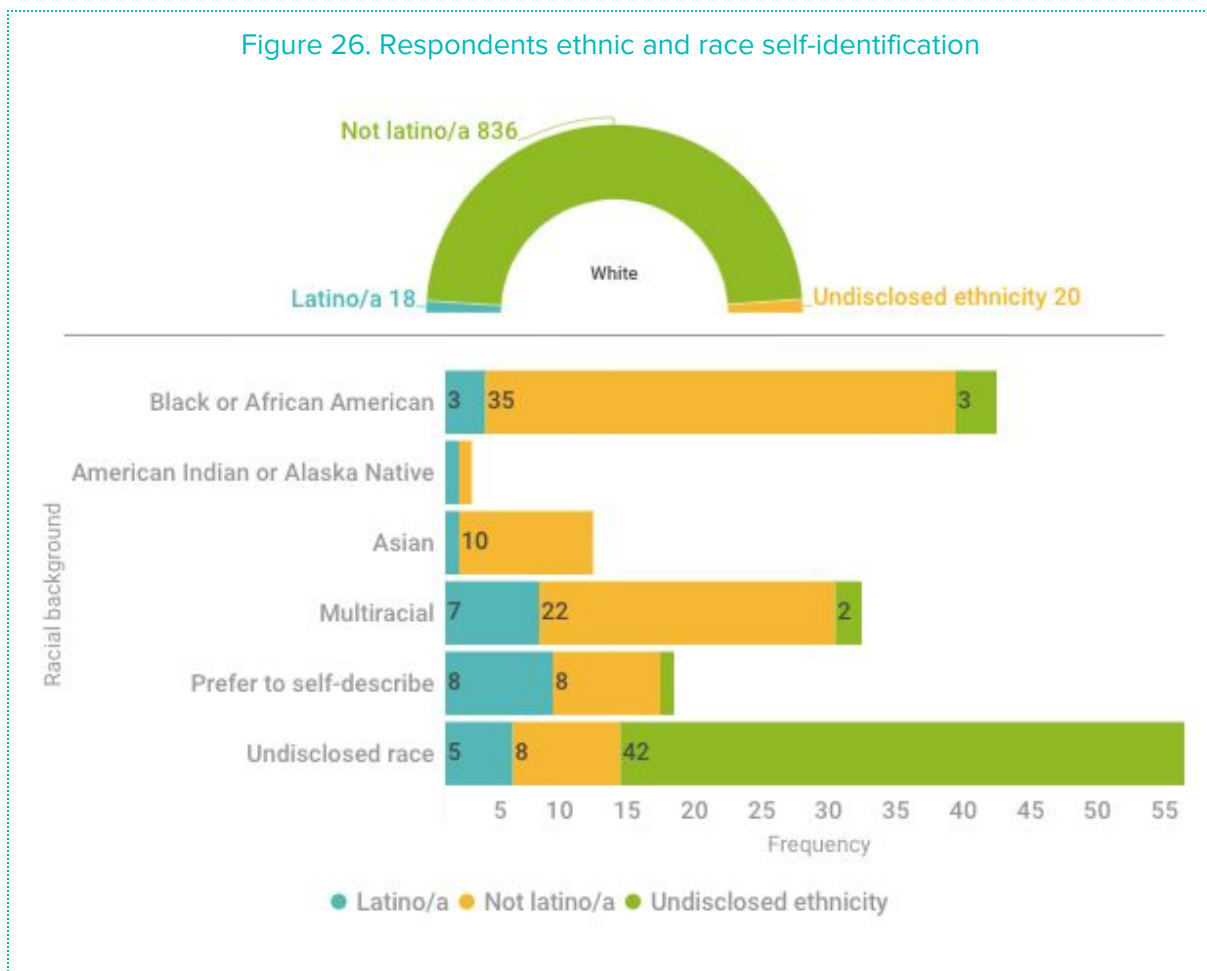
## Demographics

Questions about respondents' gender, ethnicity, race and sexual orientation were included to investigate any inequality patterns in the music ecosystem among minority groups. The

categories were created reproducing the U.S. Census categories and considering Indianapolis' demographic characteristics.

## RACE AND ETHNICITY<sup>60</sup>

The numbers for ethnic and racial representation in the Indy Music Strategy survey differ in some cases from the American Community Survey,<sup>61</sup> one of the most reliable official sources to assess demographic profile by race, by U.S. county, in the music industry.



<sup>60</sup> The question about ethnic self-identification was answered by 98.6% or 1,038 respondents; the question about race self-identification was answered by 98.9% or 1,041 respondents.

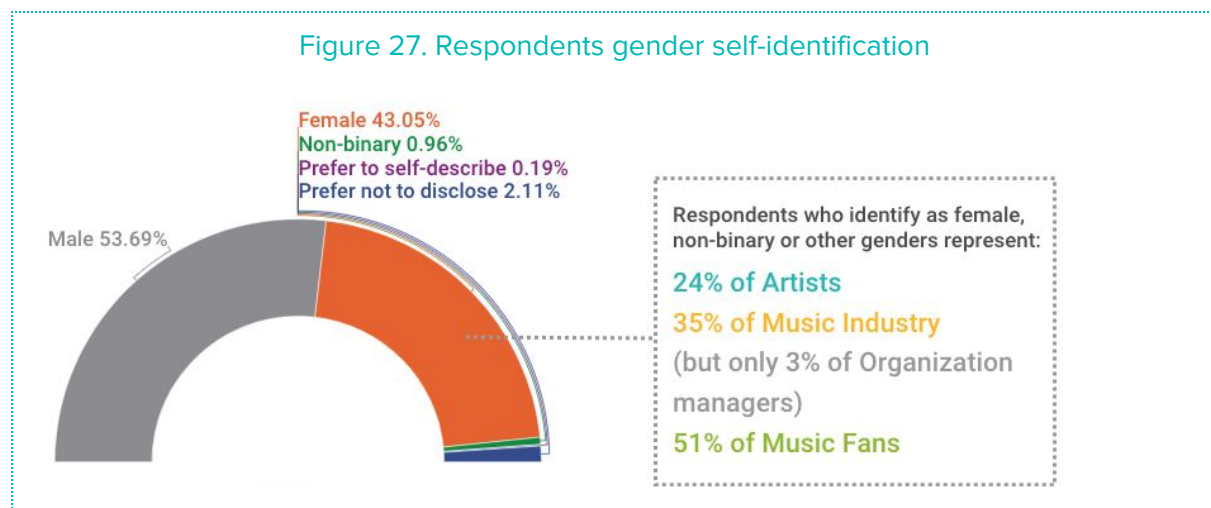
<sup>61</sup> U.S. Census Bureau (2019)

Open comments in the survey also highlighted underlying demographic differences in the population that challenge the diversity of the music community and its audiences, quoting historic issues, redlining and displacement of the Black community, and the exclusion of Latin talent in important festivals and events in Indy.

Table 8. Comparison of Indy Music Strategy survey sample to Population of Musicians from ASC<sup>62</sup>

Demographics for Marion County <sup>63</sup>	Not Hispanic or Latino	Hispanic or Latino	White	Black or African American	American Indian	Asian	Two or more races
Musicians, ACS data	96.49%	3.51%	80.7%	18.4%	0%	0%	0.88%
Musicians, SD survey	84%	6%	80%	8%	0%	1%	4%
Music industry, ACS data	95.75%	4.25%	78.34%	15.43%	0.2%	2.18%	2.47%
Music industry, SD survey	89%	3%	85.1%	3%	0%	0%	3%

## GENDER<sup>64</sup>



<sup>62</sup> It should be taken into consideration that the Indy Music Strategy demographic questions were not mandatory and the option 'Prefer not to disclose' was included, unlike the ACS.

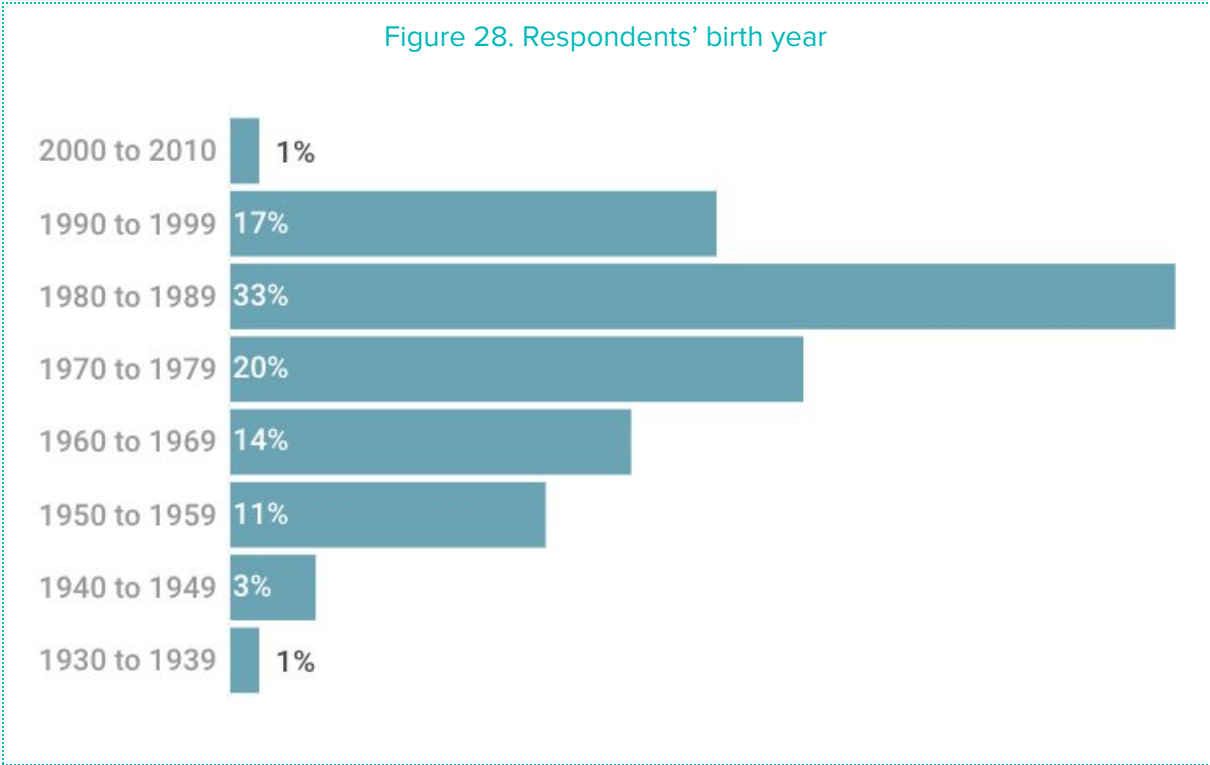
<sup>63</sup> Please note that the survey did not receive any complete responses from the ethnic background 'Native Hawaiian or other Pacific Islander', and the ACS sample of musicians and music professionals neither reached any from Marion County.

<sup>64</sup> This question was answered overall by 99.0% or 1043 respondents

Similar to the case of race and ethnic representation, the low volume of Artists, Organizations and Professionals respondents identifying as a gender other than male calls for further engagement and insight on the involvement of women and non-binary persons in the Indianapolis' music ecosystem. Open comments in the survey further pointed out that the city needs to better support emerging female artists by enforcing more bookings of female artists, which would increase their visibility in the ecosystem.

AGE<sup>65</sup>

A question regarding respondents' birth year was included to identify any possible gaps and inequalities among participants in the music ecosystem in Indianapolis. 1 out of 2 participants in Indianapolis' music ecosystem are 40 years old or younger, and two roles have a disproportionate age imbalance: 61% of Professionals are 40 years old or younger, while only 33% of Organization (managers) who provided their age are under 40. The largest concentration of respondents per age correlates to Indianapolis' largest population groups.<sup>66</sup>



<sup>65</sup> This question was answered overall by 89.7% or 944 respondents

<sup>66</sup> World Population Review (2019)

## Music Ecosystem Ratings

Respondents with Artist, Organization and Professional roles were asked to rate several aspects of Indianapolis' music ecosystem on a scale of 1 to 5 stars, with 5 stars being the highest positive vote. Music Fans were also asked to rate different areas in Indianapolis' music ecosystem using the same scale of 1 to 5 stars. Findings from the ratings are included in the strategic opportunities explained in section 6, further in this document.

Here are the average ratings by Artists, Organizations, Professionals and Music Fans:

Table 9. Average ratings for the Indy music ecosystem, by survey respondent role

CATEGORY / RATING	ARTISTS	ORGs	PROs
<b>Affordability of housing</b>	4	4	3.5
<b>Affordability of workspace and/or rehearsal spaces</b>	3	3	3
<b>Availability of funding support</b>	2	2	2
<b>Performance opportunities for emerging artists</b>	3	3	3
<b>Performance opportunities for established artists</b>	4	4	4
<b>Availability of paid performance opportunities for working musicians</b>	2.5	2.5	3
<b>Fair payment of musicians</b>	2.5	2.5	2.5
<b>Quality of local artists' talent</b>	4	3.5	4
<b>Support from the music industry, such as labels, managers, agents, etc.</b>	2	2.5	2.5
<b>Availability of recording studios</b>	3.5	3.5	3
<b>Media coverage of local music scene</b>	2.5	2.5	2.5
<b>Audience's willingness to pay for concerts</b>	3	3	3
<b>Music heritage of Indianapolis</b>	3.5	3.5	4
<b>Reputation of Indianapolis as a music hub</b>	2	2	2.5
<b>Collaboration/sense of community within the scene</b>	3.5	3	3.5
<b>Networking/showcasing opportunities for artists and music industry pros</b>	2.5	2.5	3
<b>Collaboration with regional tourism authorities</b>	2	2	2.5
<b>Regulatory/legislative framework for live music venues</b>	2.5	2.5	2.5
<b>Regulatory/legislative framework for music festivals and events</b>	3	2.5	2.5

Table 10. Average ratings for the Indy music ecosystem by survey respondent role (Music Fan)

CATEGORY	RATING
Safety in venues/festivals	4.5
Safety around venues/festivals	4.5
Sound quality of music venues/festivals	4
Ticket prices	3.5
Diversity of music offerings and genres	3.5
Quality of local talent	3.5
Late evening/night dining options	3.5
Public transportation to music venues/festivals within Indianapolis	3
Parking around venues/festivals	3
Availability of music education	3
Quality of music education	3
Indy's music heritage	3
Public transportation to music venues/festivals within greater Indianapolis	2.5
Reputation of Indy as a music place	2.5



### III. Indianapolis Music Strategic Plan 2021-2023

Disclaimer: These recommendations were initially submitted on March 13, 2020, before the Covid-19 pandemic unfolded. As of July 2020, we have included additional insights from the past four months within the recommendations for the sectors most impacted by Covid-19 related closures. However, it's too early to know the exact scope and gravity of this crisis across the ecosystem.

However, the opportunities and challenges that have been identified as part of our research will continue to be challenges and opportunities. If anything, the current crisis is making these challenges more apparent. Addressing them in the future, and investing in these strategic opportunity areas, will help Indianapolis emerge from this crisis even stronger.

## Strategic Opportunities by Area

This section outlines the strategic opportunity findings from all the previous research stages across 6 action areas. These action areas and findings also elaborate on how to address the weaknesses in the regulatory assessment.

1. Governance and leadership
2. Audience development
3. Music education
4. Artist and industry development
5. Spaces and places
6. Music tourism

Each recommendation has been phased according to priority, indicating when they would be best suited for implementation: Phase 1 (2020-2021), Year 2 (2021-2022), Year 3 (2022-2023).

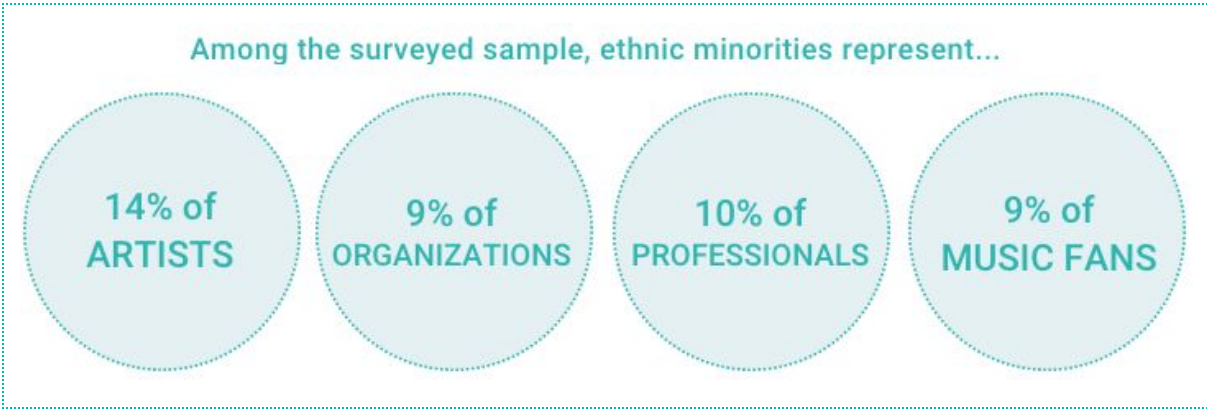
# Governance and Leadership

## Indianapolis Music Vision: Music is for Everyone

### OPPORTUNITY: LEAD WITH DIVERSITY AND EQUITY

A major theme during the sessions and survey comments was the need for an artist-led, inclusive organization that leverages diversity in this momentum through bottom-up, grassroots leadership structures. As pointed out by stakeholders and surveyed industry members, this is particularly important to overcome the lack of awareness and support of artists of color, including the lack of sponsorship for their music events and activities.

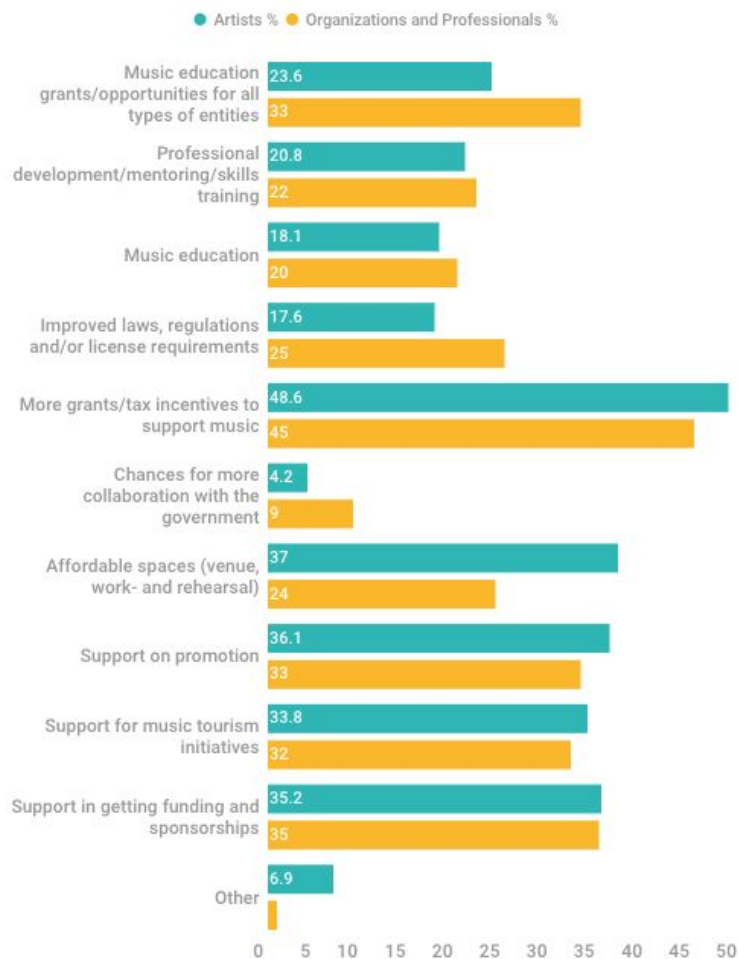
Interviewees highlighted training and empowerment is needed across the board in the music ecosystem to bring equity to leadership and career development. In the survey, the most notable gender and racial gap noted in skills/training is the access to formal mentoring and professional development opportunities, where more female artists and non-binary artists were interested in gaining mentoring (49% and 68%, respectively) than their male counterparts (32% prioritize it). More artists identifying as 'Black or African American' or multiracial also wanted to gain mentoring (41% and 63%, respectively) in comparison to artists identifying as 'White' (36%).



## OPPORTUNITY: INCREASE MUSIC-SPECIFIC SUPPORT FOR ARTISTS AND ORGANIZATIONS

The lack of funding support for a wider diversity of local artists and organizations and the need to increase funding for the development of the music ecosystem were other main themes across roundtables and survey comments. Approximately 1 out of 2 survey respondents said increasing the grants and incentives available for music is the type of government support that would have the most positive impact for them (see below, Figure 29) and the survey category “availability of funding support” received only 2 out of 5 stars, the worst rating in the music ecosystem.

Figure 29. Areas where increased government support would have the biggest impact for Artists, Organizations and Professionals<sup>67</sup>



<sup>67</sup> Respondents could select multiple options at the same time, hence each category can add up to 100%

Among the surveyed sample, 91% of artists have never received a grant for their music activities, and neither has 1 out of 2 nonprofit organizations. Also, none of the for-profit organizations have received a tax exemption or rebate, 60% of them claiming to be unaware of what incentives exist.

However, support does not have to be exclusively financial: having increased access to affordable spaces (performance, work and rehearsal) is a priority for 37% of surveyed artists, while increasing music education grants and opportunities is a bigger priority for 1 out of 3 music industry professionals and organizations.

## Recommendation 1. Establish the Indy Music Strategy Committee as a relevant actor in the strategy implementation process

**Initiator:** Arts Council of Indianapolis, Create Indy

### Goals:

- Become a point of contact when addressing the music sector at the Mayor's Office
- Lead with continuity and direction in the implementation of the music strategy
- Build trust and representation of underserved groups in the local music industry
- Champion equity in music sector leadership for women and gender nonconforming persons, people of color, LGBTQ+, differently-abled musicians and music industry professionals and other underserved communities
- Advocate for increased support from stakeholders in government, philanthropy and in the private sector
- Foster a culture of business development, talent retention and attraction in the music ecosystem

**Context:** Music in Indianapolis must become more inclusive, allowing people from all genders, ethnic backgrounds, and ages to access more opportunities, reach broader networks and fully integrate into the entire music community. The COVID-19 pandemic has led to the creation of new industry organizations for advocacy, such as the Indiana Independent Venue Alliance (IIVA), while existing organizations like the Arts Council of Indianapolis and the Central Indiana Community Foundation (CICF) have reinforced their leadership by providing cross-sector relief, governance and leadership. An expanded Indy Music Strategy Committee that incorporates diverse stakeholders from public governance, the private sector, philanthropy and the broader music ecosystem will be the first step towards creating and establishing more

diverse-centred policies. Increased frequency in communication on urgent topics among group members is key, either through a dedicated Slack channel or a similar platform.

**Specific implementation considerations:** The Arts Council of Indianapolis should lead on the implementation of the strategy and convene, as a key resource, a renovated Indy Music Strategy Committee in partnership with Create Indy and CICF. This should develop their ongoing community engagement and audit process.

The Arts Council should house the Indy Music Strategy Committee. The committee should reflect the diversity of stakeholders and demographics in Indianapolis, ensuring a 50/50 gender split and the participation of minority groups. The committee should include a chair, a co-chair, a secretary and the members. Guests can be invited on a meeting by meeting basis, either to present on a topic, or to observe a meeting, to ensure the board remains inclusive and accessible to the music ecosystem at large. Terms of Reference need to be written for prospective members to agree upon and to declare any conflict of interest before being accepted.

The position of the Chair should be assumed by a designated person at the Arts Council. The Chair's role is to introduce guests and members, update members on action points from previous meetings and steer the general discussion. The Secretary can either be someone from within the board or appointed externally. It is an important administrative role, being responsible for:

- All communication to members
- Finding suitable dates for meetings
- Finding venues for meetings
- Creating agendas
- Minuting meetings
- Circulating all necessary paperwork

The Secretary may also act as the strategic steer to the board, by not only organizing the content of the meetings themselves, but also by pushing the board's work forward through policy work, research, and inviting appropriate guests and observers to specific meetings.

**Timeline:** Phase 1 (2020-2021)

### Best Practice Case Study - Philadelphia Music Industry Task Force<sup>68</sup>

**What Is It:** This 15-member task force was appointed by Philadelphia Councilman David Oh in January 2017 to consider the history of the city’s music industry, evaluate its current state and design a strategic plan for its development.<sup>69</sup> Members include musicians and music sector businesspersons to music marketers, venues and academicians.

**Who Is Responsible?** Its 15 members are charged by the City Council of Philadelphia and are a Council advisory body: 5 members are nominated by the Mayor and 10 by City Council.

**What Has It Done?** A report containing recommendations to grow the Philadelphia music sector was delivered in November 2019 after two years of work.

**In Their Own Words:** “It is not an endgame, but rather what we can do in the foreseeable future... a focal point regarding Philly’s music economy, something for people to rally around.”<sup>70</sup>

**Relevance for Indianapolis:** The Indy Music Strategy Committee could adapt into a larger, more diverse and permanent entity after the strategy has been delivered to lead in its implementation. One key aspect Indianapolis still needs to secure is local government buy-in and/or the direct support from a councilperson to ensure music is first and foremost in the political agenda.

## Recommendation 2. Develop a localized talent pipeline for people of color with training, recruitment, promotion and retention of artists and industry leaders.

**Initiator:** Indy Music Strategy Committee, with multiple partners.

### Goals:

- Eliminate persistent racial disparities in access to jobs, leadership, and engagement with the local and national music industry
- Create a strong development pipeline for talent in historically underserved communities in Indianapolis, particularly for people of color

<sup>68</sup> City of Philadelphia Office of Arts, Culture and the Creative Economy (2020)

<sup>69</sup> City of Philadelphia (2015)

<sup>70</sup> Ambrosi, A.D. (2019)

- Empower people of color in Indianapolis who are senior musicians and music professionals to continue teaching and inspiring the next generation in the local music sector

**Context:** The economic impact data shows a significant income gap within the music ecosystem between people identifying as ‘White’ (\$29,000 average income), people identifying as ‘Black or African American’ (\$22,000 average income) and people identifying as other races (\$21,000 average income). The data also shows that this occurs within Indianapolis’ general economy as well, reflecting the racial inequity in the city. One of the key findings related to equity in the survey was the gap in access to formal mentoring and professional development opportunities – more artists identifying as ‘Black or African American’ or multiracial also wanted to gain mentoring (41% and 63%, respectively) in comparison to artists identifying as ‘White’ (36%). Ethnic minorities were also underrepresented in the survey, particularly among business owners (only 9% of the organizations) and industry professionals (10% of professionals). This highlights the urgent need for creating a specific leadership platform that focuses on talent development and retention in the music community dedicated to people of color who identify as artists and professionals in Indianapolis.

**Specific implementation considerations:** Initially, the Indy Music Strategy Committee should form a dedicated sub-committee to identify and build relationships with with people of color who identify as artists and industry leaders in Indianapolis, Indiana and the rest of the U.S. through regular meetings and collective goals. Stakeholders should be gathered from all the industries and sub-sectors in the music ecosystem (recorded, live, education, tech, media/journalism) as well as adjacent industries including film, gaming, performing arts, tourism and sports, at minimum. Within the first year of meetings, the committee should have produced a list of priorities to deliver, in collaboration with the feasible partners, in relation to talent training, recruitment, promotion and retention in the music ecosystem for people of color.

As a second step, these leadership partnerships and resources should be centralized and coordinated through a talent pipeline management strategy, led by the Indy Music Strategy Committee (or an external organization), that connects members in the community with the right stakeholders to support their business activities and present them with upcoming opportunities. This implementation can be tied to the development of the local music business directory outlined in Recommendation 13, focusing on equity and prioritizing artists and professionals from the Black and Brown communities in all the sub-sectors in the music ecosystem and the adjacent industries specified above.

**Timeline:** Phase 1 (2020-2021) through Phase 3 (2022-2023)

### **Best Practice Case Study - Seattle Music Commission<sup>71</sup>**

**What Is It:** a 21-member volunteer commission representing a cross section of the city’s music sector. It works with City departments and the greater community to advance the goals outlined in Seattle’s City of Music 2020 Vision, striving to enhance the growth and development of the local music sector. It is divided into 3 committees: the “Executive Committee”, the “Advocacy + Economic Development Committee” and the “Youth + Community Committee”.

**Who Is Responsible?** It is staffed by the City of Seattle Office of Film + Music. It works with City departments and the greater community.

**What Has It Done?** Advance the goals outlined in Seattle’s City of Music 2020 Vision and continue to measure and assist the local music sector. Its priority areas are structured in yearly work plans.

**In Their Own Words:** “Oftentimes [the Commission] is an outlet to ask, ‘What do I do? Where do I go?’ We are not a policy-creating body, but we can often point people in the right direction or amplify their voice to the appropriate folks.”<sup>72</sup>

**Relevance for Indianapolis:** Seattle appointed its music commission to ensure the continuation of the strategy and its goals throughout the plan. The support of the city council is key to ensure continuity and leadership as the Seattle Office of Film + Music helps connect the sector with other city departments and stakeholders, something the Indy Music Strategy Committee could benefit from. The themed committee structure ensures stakeholders in each sub-sector can advance, execute and monitor the strategies in their area of action. This is an effective structure for advancing the goals towards the development of a talent pipeline in Indianapolis’s music sector.

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<sup>71</sup> Seattle Government (2019)

<sup>72</sup> Scruggs, G. (2017)



### Recommendation 3. Enhance funding opportunities for the entire music sector, with a focus on special loans and grant programs

**Initiator:** Indy Chamber (City of Indianapolis), Arts Council of Indianapolis, additional funders

**Goals:**

- Increase financial equity for music professionals and organizations who are not able to access traditional funding sources
- Support diverse music actors across the local music community, focusing on musicians and music organizations who are underrepresented in current grant initiatives
- Grow the music and intellectual property industry for increased economic self-sufficiency
- Maximize the impact of music industry initiatives that amplify Indy’s music industry and brand

**Context:** The economic impact assessment shows a low percentage of employed musicians in the music ecosystem (representing 11% of jobs), who earn unpredictable incomes, on average, year-on-year. The vast majority of musicians and organizations in Indy cannot obtain financial assistance through traditional bank services and bank loans, due to the unpredictability of the vocation or the lack of collateral assets. The current grant model is supported on a local level by community and philanthropic partners, including the Arts Council (with a combination of public and philanthropic funding), and the City of Indianapolis via Create Indy. Most funding efforts at the present time focus on reducing the effect of cancellations and uncertainty during the Covid-19 pandemic, but structural and investment funds and loans will be crucial to rebuild the ecosystem after the crisis.

**Specific implementation considerations:** Indy Chamber should work in partnership with the Arts Council of Indianapolis, Indiana Arts Commission and the Central Indiana Community Foundation (CICF) to identify funding gaps and priorities in the music ecosystem for the nonprofit and for-profit sectors. This would include testing eligibility for music organizations and musicians for funding programs, such as the Indy Arts & Culture COVID-19 Emergency Relief Fund (for artists and nonprofits)<sup>73</sup> and Indy Chamber’s Small Business Loans (for businesses without collateral<sup>74</sup>), for instance, and identifying their flaws. The Indy Chamber would be responsible for for-profit organizational and professional support and Arts Council for nonprofits and artists. Existing resources should be promoted as well.

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<sup>73</sup> IndyKeepsCreating.org (2020) Website. Online at <https://indykeepscreating.org/> accessed 7-14-2020

<sup>74</sup> Indy Chamber (2020) Lending. Online at <https://indychamber.com/entrepreneurship/lending/> accessed 7-14-2020

Nevertheless, the Arts Council should work in partnership with CICF and the Indiana Arts Commission to develop a dedicated fund open to all music-related projects, including (but not limited to) educational projects, touring (and live streaming), recording, music event and festival development, and education projects on a yearly basis. Communication and guidelines need to be transparent and publicly available and should include objectives, assessment criteria, eligibility criteria, project requirements and deadlines.

Equity and diversity should be at the heart of these guidelines, prioritizing applicants and projects in underserved demographics and communities in the local music sector, including women and gender non-conforming persons, people of color, differently abled persons, and/or serve marginalized areas in the city. Similarly, organizations that have equity and diversity at the core of their objectives should be prioritised as well.

**Timeline:** Phase 2 (2021-2022) through Phase 3 (2022-2023)

### **Best Practice Case Study 1 - NYC Grants for Female Musicians<sup>75</sup>**

**What Is It:** In June 2019, in an ongoing effort to foster equity and address under-representation in the arts, the New York City Mayor’s Office of Media and Entertainment (MOME) announced a dedicated \$500,000 grant fund for NYC-based female musicians. Female-identifying artists from every aspect of music creation - music acts, producers, engineers, writers - are encouraged to apply. The grants are accessible for artists who aren’t signed to a major label, have a growing fan base, and have played multiple live shows. While it remains in its infancy, the creation of the fund has been motivated by recent data from the USC Annenberg annual report on gender and race/ethnicity in music.<sup>76</sup> The report found out that only 10 percent of GRAMMY nominees from 2013 to 2019 were female, and less than 25 percent of Billboard Hot 100 year-end charting songs released between 2012 and 2019 were by female artists, among other findings.

**Who Is Responsible?** It is administered by the New York Foundation of the Arts.

**In Their Own Words:** "In this space, we want to make sure that a female-identified creative has a writing credit, an engineering credit, a producing credit or a lead artist credit".<sup>77</sup>

**Relevance for Indianapolis:** Funding increases accessibility and capacity building among

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<sup>75</sup> New York City Economic Development Corporation (2019)

<sup>76</sup> University of Southern California (2019)

<sup>77</sup> Gothamist (2019)

those who are not able to access bank funding. New York's dedicated program to support the music sector based on gender and race/ethnicity inequalities should be mirrored in Indianapolis to directly influence the participation of minorities, women and differently-abled persons in the music industry.

### Best Practice Case Study 2 - Creative Industries Loan Fund (Atlanta, GA)<sup>78</sup>

**What Is It:** The City of Atlanta launched in 2017 a fund to provide loans with low interest rates and flexible repayment terms for independent content creators and creative entrepreneurs. Any musician, entrepreneur or organization based in the City of Atlanta with a valid business license who has attended an information session is eligible for the loan. Its main draw for the music sector is that loans can sum up to \$50,000 for creative projects and up to \$100,000 for touring/festivals, and the program takes intellectual property as collateral. Invest Atlanta also offers technical assistance, capacity building and access to expertise in addition to the fund.

**Who Is Responsible?** A joint program of the City of Atlanta's Mayor's Office of Film and Entertainment and Invest Atlanta, the city's official economic development authority.

**What Has It Done?** Since applications opened in January 2019, Invest Atlanta has funded 10 projects, deploying almost \$500,000 into film, music and tech projects.<sup>79</sup>

**In Their Own Words:** "The Creative Industries Loan Fund gives us a new tool to create jobs, retain our top creative talent, and strengthen Atlanta's reputation as a global entertainment capital."<sup>80</sup>

**Relevance for Indianapolis:** Atlanta is a firm supporter of its creative industries and understands the return of investment benefits the city from an economical standpoint, but also its image. Indy Chamber is committed towards developing indicators for a more inclusive economy in the city, working with the Brookings Institution's Metropolitan Policy Program.<sup>81</sup> As part of this work, it should assess how music businesses can be incentivized to get more involved in their communities, for instance granting access to Indy Chamber's low- and no-interest loans and other funding opportunities.

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<sup>78</sup> Invest Atlanta (2020a)

<sup>79</sup> Invest Atlanta (2020b)

<sup>80</sup> Invest Atlanta (2017)

<sup>81</sup> Indy Chamber (2020)

## Indianapolis Music Vision: Music Requires Smart Policy

### OPPORTUNITY: CHAMPION ACCESSIBILITY AND EQUALITY IN MUSIC SECTOR POLICY

Roundtable participants pointed out a “plan fatigue” among the population that transpires to the music ecosystem. Part of this fatigue is linked to the top-bottom implementation approach of many policies that leave citizens uninvolved: several stakeholders spoke openly about the unwanted consequences of Unigov, such as its devastating effects on community segregation, and the disappearing of local music heritage.

As pointed out by roundtable participants and survey respondents, the main regulations currently damaging the live music ecosystem are the “Dancehall Ordinance” and state liquor regulations preventing the participation of under-18 and 18-21 year-olds in music venues, including underage artists and audiences, most Indianapolis university students and minors accompanying adult performers.

Across hip-hop and Latinx music industries, participants talked extensively about issues with working with city government and city licensing agencies. Specifically, they talked about difficulties obtaining liquor licenses, insurance, and approval from agencies like the health department and fire marshal. An additional issue exists with photo ID, as many in the Latinx community do not have an Indianapolis driver’s license, which is required to access live music at a licensed venue.

### OPPORTUNITY: UPDATE EXISTING PLANNING AND ZONING FOR MUSIC

Cultural Districts are already a popular asset in the city, and city planners are looking into developing more small, hyper-local districts centered around cultural uses and walkability. Such districts could be assessed individually to trial policy modifications and transform them into Entertainment Districts, including potential Music Districts. Because most US cities do not have them in place yet, Indy would step itself up by having special regulations for music

venues in Indy and creating sound limit guidelines for music places and events that also assist with health and safety standards.

### OPPORTUNITY: ESTABLISH QUALITY STANDARDS FOR MUSIC SPACES AND PLACES

Most of the established music venues and festivals in Indianapolis are doing a good job on assessing the standards for safety and security on their own: the ‘Safety in venues/festivals’ and ‘Safety around venues/festivals’ were the top-rated assets by the surveyed audience with 4.5 out of 5 stars. Respondents identifying their gender as ‘female’ and/or as a racial minority give a lower rating to ‘Safety around venues/festivals’ (4 out of 5 stars).

Despite this good job, the lack of regulatory standards challenges the sustainability of venues and events, which is noted in the poor rating (2.5 out of 5 stars) organizations and professionals gave to the “Regulatory standards for live music venues” and for music festivals and events.

## Recommendation 4. Amend regulatory frameworks to create an equitable music ecosystem

**Initiator:** Indiana Independent Venue Alliance, Arts Council of Indianapolis, The Build

### Goals:

- Ease and standardise the processes to request the licenses and permits needed for music activities such as outdoor events
- Set equitable enforcement guidelines and policing for all spaces presenting music
- Increase safety and diversity in the music ecosystem
- Facilitate the development of live music and the activity of music organizations
- Facilitate the economic growth of independent music venues throughout the city

**Context:** There is a limited number of liquor licences for each county in Indiana, and the same licensing conditions apply to bars with live music entertainment than to those without. This assumes that music is simply an accessory to liquor sales. Representatives of the hip-hop community and the Latinx community interviewed in the study currently face disparities in obtaining liquor permits, event-related licenses and approval from government agencies. This creates the perception that certain genres of music/events are policed more strictly than others (e.g. higher security standards and insurance fees, and not receiving license approval).

City government is undergoing plans to include a one-stop-shop for permits and licenses in waterfront areas, which will encourage more music activities under clear regulatory standards.

**Specific implementation considerations:** The Indiana Independent Venue Alliance (IIVA) should meet with independent cultural event promoters/producers in Indiana – with the support of the Arts Council, The Build and the Indy Music Strategy Committee– to design standard license requirements for music and arts events that provide equitable opportunities for producers, artists and audiences across the state. This should be modelled on Australia’s Live Music Matrix (see case study below) and Milwaukee’s licenses that allow under-aged audiences at shows (see case study in Recommendation 5).

This consensus on standard license requirements and responsibilities should be compiled into a guide or matrix detailing the licensing and safety responsibilities of music venues and event organizers. The sector can use this guide/matrix to address the Indiana Alcohol & Tobacco Commission and the State of Indiana in a proactive way, to help reach an agreement and amendment on licence conditions and policy that is equitable to everyone – regardless of music genre –, and provides additional benefits to venues and organizers with a good compliance history. These licence conditions and policies should then be implemented at the state, county and municipal level with the help of appropriate safety and community partners, including police departments and community development groups.

**Timeline:** Phase 1 (2020-2021) through Phase 2 (2021-2022)

### **Best Practice Case Study - Live Music Licence Conditions Matrix, Victoria (Australia)<sup>82</sup>**

**What Is It:** Since 2013, the Live Music Licence Conditions Matrix sets out standard licence security conditions for music venues in the province of Victoria. Venues providing live music and trading after 1 am should submit a management plan to the Victorian Commission for Gambling and Liquor Regulation complying with their guidelines, which is then provided to the Victoria Police for comment. For instance, owners of a live music venue can apply to remove the requirement of crowd controllers and CCTV free of charge, assessed by the Matrix.

The management plan takes into account varying conditions, depending on the venue’s planning permit, trading hours, capacity and history of compliance. Victoria also has a help desk with dedicated licensing officers to assist licensees providing live music navigate the

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<sup>82</sup> Victorian Commission for Gambling and Liquor Regulation (2013) “Licence conditions for live music venues”. Online at [https://www.vcglr.vic.gov.au/sites/default/files/uploadLiquor\\_licensing\\_fact\\_sheet\\_-\\_Licence\\_conditions\\_for\\_live\\_music\\_venues.pdf](https://www.vcglr.vic.gov.au/sites/default/files/uploadLiquor_licensing_fact_sheet_-_Licence_conditions_for_live_music_venues.pdf)

alcohol licensing system.

**Who Is Responsible?** The agreement was reached between representatives of the live music industry, the Victorian Government and the Victorian Commission for Gambling and Liquor Regulation.

**What Has It Done?** The measure is still in place today, which speaks to the effectiveness of the policy change. Furthermore, Music Victoria (the state’s industry organization) produced a “best practices” document in 2017 for music venues that also addresses licensing and security topics.<sup>83</sup>

**Relevance for Indianapolis:** The recent creation of the Indiana Independent Venue Alliance has created great momentum for the live music industry to advocate for changes long due, including the creation of fair and clear licensing and safety responsibilities that differentiate music venues from bars and other night entertainment places, recognising the added value music venues provide to the community. The case of Victoria can be used to follow the same steps to collaborate across the board – first, agreeing to commit to a series of best practices, and then advocating to formalize a policy framework that rewards best practice so live music can become equitable and more accessible to the music community than it is today.

## Recommendation 5. Increase all-ages access and create a more inclusive music ecosystem

**Initiator:** Indiana Independent Venue Alliance, Develop Indy, Indy Parks

### Goals:

- Allow all-ages access to audience and artists in Indianapolis (Under 21 age-groups)
- Facilitate the economic growth of independent music venues throughout the city
- Establish a quality and safety standard for local music venues willing to host all-ages shows

**Context:** Currently, there are very few venues or music spaces that allow for under-age access, primarily due to the sale and distribution of alcohol. These measures have negative

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<sup>83</sup> Music Victoria (2017) Best Practice Guidelines for Music Venues. Online at [https://www.musicvictoria.com.au/assets/BPG\\_Venues\\_2017LR.pdf](https://www.musicvictoria.com.au/assets/BPG_Venues_2017LR.pdf)

effects on the broader music community, minimizing the economic impact and failing to utilize the greater potential of a thriving music economy. To combat this, some music spaces bypass the restriction in creative ways, such as hosting dinners or holding several business permits, but this is also costly.

**Specific implementation considerations:** This implementation is closely tied to Recommendation 4, where the increased advocacy and collaborative work led by the Indiana Independent Venue Alliance and other industry partners should conclude in an agreement with the relevant partners (in this case, Develop Indy and Indy Parks) to eliminate the “dancehall ordinance” and allow music venues and event promoters/producers with a proven track of compliance to host all-ages events under certain conditions.

The below case study of Milwaukee is an example of how regulations can be amended in Indianapolis so music venues and other cultural centers can continue to support the local arts scene across all ages, while not reducing vital income from beer and liquor sales. This recommendation is tied to Recommendation 6, to trial the new all-ages access licence in a specific district in the city before expanding it to the whole city.

**Timeline:** Phase 1 (2020-2021) through Phase 2 (2021-2022)

#### **Best Practice Case Study - Center for Visual and Performing Arts License (Milwaukee, WI)<sup>84</sup>**

**What Is It:** in October 2019 Milwaukee moved forward with less-restrictive city codes that allow venues to host all-ages shows and simultaneously serve alcohol to patrons 21 and over. The previous ordinance prevented venues from selling alcohol at all-ages shows unless venues were licensed as a “center for the visual and performing arts.” The requirements of the license was to boast a “culturally significant display of artwork” or have a stage larger than 1,200 square feet – way larger than what most small clubs could realistically accommodate.

Now, venues must only have a “designated performance space” to qualify for the licence and must not sell any liquor 2 hours before or after a day’s performance. License proposals should detail health and safety plan as in any other license application, and a proposal to determine who can and cannot drink, e.g. a colored wristband system, additional control staff, etc. and pay an annual fee according on their maximum capacity, ranging from \$150 for premises under 25 capacity, to \$2,000 for those with over 500 capacity.<sup>85</sup>

**Who Is Responsible?** The chair of the Licenses Committee, Ald. Nik Kovac, sponsored the

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<sup>84</sup> City of Milwaukee (2019)

<sup>85</sup> Wild, M. (2019)



new ordinance. Kovac noted that the previous code had been on the books for approximately 15 years.

**What Has It Done?** Local venue Cactus Club was publicly announced as the first Milwaukee venue to apply for the new all-ages license in January 2020.

**Relevance for Indianapolis:** Milwaukee’s recent all-ages ban uplift reflects the communities all over the U.S. that are updating its restrictive codes to bring together people of all ages through music and the arts. In the case of Indianapolis, more advocacy efforts should be directed towards the State of Indiana to address the sustainability models of music venues. Ultimately, the city should aim towards a more flexible model to host all-ages shows that eliminates the “dancehall ordinance” and changes existing licensing red tape to create a more inclusive ecosystem.

## Recommendation 6. Assess the implementation of an overlay zoning for music, arts and culture in cultural districts and other areas of special interest

**Initiator:** Indiana Independent Venue Alliance, Create Indy, Arts Council of Indianapolis, City of Indianapolis (Department of Metropolitan Development)

### Goals:

- Protect music activity amidst increased population density
- Give residents control of where they want to have music activities
- Set equitable progressive standards for music events in terms of noise and zoning
- Incentivise a diverse arts and culture offer in strategic development areas
- Streamline music events permits in a single procedure
- Implement the Agent of Change policy
- Establish safe loading and unloading zones for musicians

**Context:** New, clear ordinances for sound levels and safety requirements must be in place to avoid arbitrary sanctions to certain events or music genres. Cultural Districts are already a popular asset in the city, and city planners are looking into developing smaller and more hyper-local districts centered around cultural uses and walkability. Establishing an Entertainment District with music-centred policies and branding, or transforming at least one of the Cultural Districts into an Entertainment Zone, will ensure that venues and music spaces are

promoted effectively, which helps to increase the audience participation and engagement from the broader Indy communities.

**Specific implementation considerations:** The Arts Council of Indianapolis and the Indiana Independent Venue Alliance should work together with the Department of Metropolitan Development to assess what would be the best district to implement a trial overlay zoning for music, arts and culture. It should include policies favoring the sustainability of the music sector, including the automatic trigger of an “Agent of Change” principle within 100 feet of existing live music performance venues (see case study below). The three organizations should engage frequently to keep track of conflicts and opportunities related to music, property developments and the local community.

The zoning overlay should include the categories ‘Indoor Music Establishment’ and ‘Outdoor Music Establishment’ and be written into its zoning uses and planning strategy, giving preference to development and use change applications in these uses. These categories will be used to differentiate live music spaces with amplified sound from the generic uses currently contemplated in Indianapolis’ zoning codes (‘Indoor Recreation & Entertainment’, ‘Bar or Tavern’ (+21), ‘Night Club’ (+21), ‘Eating Establishment’). The zoning should also favor applications for temporary outdoor events. Music Establishment uses should also include designated loading and unloading zones reserved for musicians in their vicinity.

The implementation of this recommendation can potentially be tied to Recommendations 4 and 5 if all partnerships are aligned.

**Timeline:** Phase 3 (2022-2023)

## What is the Agent of Change?

The Agent of Change Principle holds the entity that creates a change in an area responsible for the impact this change can have in that area. In the case of music, usually the Agent of Change either requires the building that arrives the latest (be it the music venue or the residential development) to soundproof adequately to avoid nuisances and complaints, and/or to inform the new residents that they are moving next to a music venue or within an entertainment area which permeates noise.

The Victoria state government in Australia was the pioneer in passing the ‘Agent of Change’ planning policy in 2014. This Agent of Change integration does not change the legal noise limits, but rather ensures new developers pay for soundproof against the legal limits if needed. A review into its efficacy to date was published in December 2018<sup>86</sup>, issuing recommendations for policy improvement, such as including more precise definitions, having testing periods of soundproofing solutions, and using entertainment precincts to better apply the Agent of Change.

San Francisco’s Agent of Change Law (Administrative Code Chapter 116, called Compatibility and Protection for Residential Uses and Places of Entertainment) was approved in December 2015<sup>87</sup> and requires venues to maintain the sound levels they operate at within the limit of its entertainment permit in order to remain under legal protection. It is the responsibility of the developer to inform any new residents of the existing sound in the area. San Francisco also protects music venues from hotel and motel sound complaints within 300 feet of the venue. The San Francisco Entertainment Commission reviewed 103 projects between 2016 and 2018 of new residential and hotel/motel proposals near existing places of entertainment.<sup>88</sup>

The Music and Entertainment Division of the City of Austin presented in April 2019 a set of recommendations addressing the “agent of change” and its possible implementation in Austin, including a revision to the sound ordinance and more strict enforcement of noise disturbances, looking at building code requirements for new developments within a 600-foot radius of an existing venue.<sup>89</sup>

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<sup>86</sup> Music Victoria (2018)

<sup>87</sup> Green, E. (2015)

<sup>88</sup> San Francisco Entertainment Commission (2018)

<sup>89</sup> Swlatecki, C. (2019)

## Best Practice Case Study - Red River Cultural District (Austin, TX)<sup>90</sup>

**What Is It:** Austin has six official entertainment districts, the Red River district being the main music hub, with different venues showcasing distinct music programming every day of the week. A six-month pilot program launched in May 2017 extended the curfew for five outdoor music in Red River Street, allowing sound until midnight on Thursdays and 1am on weekends.

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 - 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 placed to measure noise levels inside the participating venues, as well as at hotels and homes in the area. During the concert series Hot Summer Nights, venues are allocated a set amount of fair guarantees for bands in a use-it-or-lose-it fashion while providing free shows and bigger crowds.

The pilot ended with satisfactory results: the program evaluation showed the extension resulted in a consistent year-over-year 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.

**Who Is Responsible?** The Red River Merchants' Association, a coalition of 40 local small businesses in the district.

**What Has It Done?** After initial success, the pilot was extended to a year, and in April 2018, extended curfews were officially approved for five outdoor music venues in Red River.<sup>91</sup>

**In Their Own Words:** "The Red River Cultural District is known as the Live Music Capital of Austin. In collaboration with Souly Austin, they hope to strengthen their cohesive identity through creative placemaking initiatives. Building daytime patronage and foot traffic is a priority for the RRCD, and they're looking into the creation of daytime activities, iconic events, supporting creative industries, and beautification."<sup>92</sup>

**Relevance for Indianapolis:** it is beneficial for music venues to have clear laws and standards that address their potential nuisances as well as the benefits they bring to the area, such as economic development. However, there are current hurdles to this implementation in Indianapolis, including the lack of a comprehensive noise ordinance, the saturation in quotas for liquor licences and the limitations for all-ages events conditioned by the dancehall

<sup>90</sup> Sengupta Stith, D. (2018)

<sup>91</sup> Visit Austin (2019)

<sup>92</sup> City of Austin (2020)

ordinance. These should be addressed first and foremost to set the foundation for special music districts.

## Recommendation 7. Devise music-centred incentivization programs through collaborative partnerships with the State of Indiana

**Initiator:** Arts Council of Indianapolis, Indiana Destination Development Corporation (IDDC), Indiana Economic Development Corporation, Indiana Independent Venue Alliance

### Goals:

- Determine and enable music industry incentive opportunities in Indiana, focusing on cross-sector development initiatives and established partnerships
- Establish the music sector as a key economic driver through increased political awareness and concentrated support for the local music community
- Improve the self-sufficiency of the music industry and intellectual property sector in Indiana
- Promote best practices regarding music industry development among U.S. states

**Context:** The State of Indiana is showing increased support towards the music sector, but it hasn't yet launched a specific program for the music industry. The recently approved Senate Bill 262 to create a Film and Media Production Program is a good starting point to increase the competitiveness of the state's creative industries.<sup>93</sup> This joint approach will be crucial to reduce the effect of Covid-19 losses for artists and music industry professionals and organizations. Bridging the sub-sectors of the entertainment industry will help create more diverse opportunities for artists to not only grow, but to foster their talents locally. In doing so, this will help to entice student tourism and prevent talent drain.

**Specific implementation considerations:** The Arts Council of Indianapolis and the Indy Music Strategy Committee should proactively approach the Indiana Destination Development Corporation (IDDC) to recommend for the inclusion of Indiana music within the new Film and Media Production Program for Indiana (Senate Bill 262). The program should offer an additional rebate or other type of incentive for the expenses related to composing, performing, scoring, recording and licensing of music made in Indiana for media productions

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<sup>93</sup> Indiana General Assembly (2020)

benefitting from the incentive. The Arts Council of Indianapolis and other organizations promoting local artists (e.g. Musical Family Tree) can further support the promotion of local music through IDDC by linking the program to the unified database of local music businesses and artists suggested in Recommendation 13.

While advocating for the integration of music in the film incentive, the Arts Council should also work towards long-term investment in the local live ecosystem with the support of the Indiana Independent Venue Alliance and the Indiana Economic Development Corporation. The Music Incubator Program that is being developed in Texas (see case study below) provides a small business tax relief through a rebate program for qualifying music venues and is a pioneering support initiative Indianapolis and Indiana should advocate for. This incentive could be tied to the new regulations for all-ages venues proposed in Recommendation 5 to relieve the income losses of all-ages venues compared to those exclusively programming +21 shows.

**Timeline:** Phase 2 (2021-2022) through Phase 3 (2022-2023)

#### **Best Practice Case Study - Music Incubator Program, Texas<sup>94</sup>**

**What Is It:** In 2019, the Texas Music Office spearheaded the development of House Bill 2806/Senate Bill 1832 to create the Texas Music Incubator Program (TMIP), which would provide small business tax relief through a rebate program on mixed beverage and alcohol tax receipts for qualifying Texas music venues.

TMIP would be funded by a small percentage of the mixed beverage gross receipts tax collected by qualified music venues and paid into a rebate fund. A statute would define what criteria constitutes a music venue under this program, and those music venues would be eligible for a tax rebate subject to a cap of \$100,000 per year. The fund would also accept gifts, grants and contributions to further grow its funding pool.

**Who Is Responsible?** If approved, the Texas Music Office would be responsible for the fund.

**What Has It Done?** Both HB 2806 and SB 1832 were favourably voted in early 2019 and currently await consideration by the Texas senate. There hasn't been any news since then.

**Relevance for Indianapolis:** Small music venues are talent incubators and play a vital role in a healthy urban ecosystem. The Indy Music Strategy Committee should assess how a possible new incentives package (like the Indiana Senate Bill 262) would benefit the agents in the ecosystem that are most challenged by the current revenue system and regulatory

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<sup>94</sup> Texas Restaurant Association (2019)

framework, such as small grassroots venues that program local artists, nonprofit organizations working on education, capacity building and music health initiatives, and the musicians themselves.

## Music Education

### Indianapolis Music Vision: Music is a Continuous Learning Process

#### OPPORTUNITY: FOSTER MUSIC EDUCATION AND INDUSTRY PARTNERSHIPS

Indianapolis is now a recognized place for music educational events, especially after the successful relocation of national associations Music For All, Drum Corps International and the Percussive Arts Society. However, there is not much connection between music organizations, music students and the music industry in Indianapolis on a day-to-day basis. Interviewed organizations are allocating outreach resources voluntarily to establish these partnerships and collaborations with the music industry (e.g. sponsored events), with no central coordination from the local government.

Increased efforts should focus on creating better counselling and information on the career opportunities available from the high-school and university/college level. A survey respondent with a music college degree highlighted the abundant possibilities in the local job market for music therapists, yet no one had informed her this was a career possibility. Interviewees and roundtable participants face networking challenges to plug in music students into career development and employment opportunities in the local industry, causing graduates to leave the city in order to find full-time positions in music.

#### OPPORTUNITY: INTEGRATE MUSIC IN LOCAL EDUCATION STRATEGIES

Although the availability of high-quality music education in Indianapolis received a good rating from survey respondents of 3 out of 5 stars for the K-12 level (Figure 30), the Indiana Department of Education, the City of Indianapolis and Indianapolis Public Schools must have consensus on the importance of arts and music education for Indianapolis' youth of all economic backgrounds, according to interviewees and roundtable participants. Furthermore, 43% of the audience sample surveyed said they are not interested in actively playing an instrument or learning music, highlighting the lack of complicity from the general public in the subject.



An interviewee stressed that school budgets allocated to music education continue to diminish in comparison to other disciplines such as sports. Several respondents noted in their open-comments that free and/or accessible music education programs that can also cater to adults and people of different abilities to learn, listen and create music are underserved on a local level.

Figure 30. Survey respondent ratings on the availability of high-quality music education in Indianapolis



**Recommendation 8. Create music education opportunities and improve access through stakeholder collaboration**

**Initiator:** Music Crossroads, Indiana Black Expo, Arts Council of Indianapolis

**Goals:**

- Prioritize diverse music education opportunities and accessibility by providing adequate representations amongst decision-makers and music leaders

- Advocate and implement more music education funds and offerings, placing a particular focus on public schools and educational institutions
- Engage underserved music communities by offering high-quality music education programs to those who cannot access it
- Facilitate and maintain partnerships between local music educators and the music industry

**Context:** The current law in Indiana states fine arts education should be included in the curriculum, albeit it also allows schools to eliminate music courses for curriculum flexibility (House Bills 1398, 1426 and Senate Bill 177). At the moment, only 26.4% of schools in Indianapolis have music education programs at the junior high and high school levels, according to data from the Indiana State School Music Association.<sup>95</sup> Key issues such as equal access to music education across schools and music education program funding are displaced from the political conversation and budget priorities locally and in the State of Indiana. It should be recognized that music education is a foundational principle for all music cities. It is essential that all those who want to access music education, can, and that the barriers for the underserved communities are dismantled.

**Specific implementation considerations:** Music Crossroads and Indiana Black Expo should lead the advocacy for music education access and funding to create equitable opportunities for children and youth in underserved school districts of Indianapolis, particularly among Black, Latinx and ethnic minority students. Both organizations should organize regular meetings with any Indianapolis Music Schools without music education opportunities and assess their gaps and needs to comply with the curriculum, or adapt it where possible. Within one year, Music Crossroads and Indiana Black Expo should have produced a list of priorities to bring to the Indiana General Assembly to initiate the development of a long-term strategy to provide music education in underfunded schools.

The Arts Council of Indianapolis, together with Music Crossroads, should also advise the City of Indianapolis on the implementation of public-private partnerships while the strategy is developed. They should work with existing local non-profit music organizations (Indiana Black Expo, Musical Family Tree, Music For All, among others) to engage the artist community and the for-profit sector to progressively increase access to music education, despite having limited resources. These partnerships should be coordinated by a single organization to help structure the program and to liaise between the music ecosystem and the schools. It should be modelled on Seattle's Creative Advantage (see case study below).

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<sup>95</sup> According to the Indiana Department of Education, Marion County had for the 2019-2020 academic year a total of 314 schools.

**Timeline:** Phase 1 (2020-2021) through Phase 3 (2022-2023)

### **Best Practice Case Study 1 - The Creative Advantage (Seattle, WA)<sup>96</sup>**

**What Is It:** an arts education initiative launched in 2013 through a public-private partnership to restore access to arts and music for all students in Seattle Public Schools by 2020, with emphasis on racial and socioeconomic equality. Accordingly, the Creative Advantage restores access to the arts in public schools and cooperates with more than 100 community arts partners.

**Who Is Responsible?** A partnership was formed in Dec. 2014 between the Seattle Arts Commission and the Music Commission in a joint Youth + Community Committee. The unexpected increase in Admissions Tax Revenues from local tourist attractions provided for a dedicated position in the Office of Arts and Culture who engages with the joint committee to develop and implement the five-year plan to fund music and arts education for every public school student.<sup>97</sup>

**What Has It Done?** Within the last five years, the student participation in the arts increased exponentially. In 2013-14 only 35 schools used arts education, while in 2017-18 more than 68 out of 102 schools provided arts access.<sup>98</sup> As in 2017-18, the overall arts access in elementary schools was raised to 94.4% and the initiative has doubled arts access in schools since its launch.

**In Their Own Words:** “We talk about creating equitable access for each and every student to arts education and to creative learning experiences. Young people who are engaged in arts education develop lifelong skills or creative habits that support them in their journey as students but also in the rest of their life, in their careers and their communities” Lara Davis, arts education manager for the Office of Arts & Culture

**Relevance for Indianapolis:** Involving local music organisations and schools is important to garner the most support and truly assess the needs of the city and its school districts as seen by those who work/live in it. It will be crucial for a similar initiative to succeed in Indy to count on the organizational support from the Mayor’s Office, like in Seattle’s case, to maximize the efforts of the proposed group of music education stakeholders.

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<sup>96</sup> The Creative Advantage (2019)

<sup>97</sup> City of Seattle (2020)

<sup>98</sup> The BERG Group (2019)

## Best Practice Case Study 2 - The Madison Area Music Association (Madison, WI)<sup>99</sup>

**What Is It:** a non-profit music association which works alongside school districts in Madison and other community initiatives. It aims to excel in providing support, resources and preservation of music education and local youth music programs, recognizing Madison’s musicians, music students and music teachers and promoting its music scene.

**Who Is Responsible?** It is a non-government organization with an executive director and a board of advisors. It works collaboratively with school districts and community groups, while anyone can become a member with a \$5 minimum contribution to vote or register for awards consideration.

**What Has It Done?** Each year their work culminates in the Madison Area Music Awards, held since 2004 to double as a gala and a fundraiser. The association had raised over \$75,000 in funds and gear to local music programs by 2017. The awards emphasize the diversity of the local scene for various genres of songs (from Latin to Pop, Country/Bluegrass and R&B, including a ‘unique’ category), instrumentalists, and supplemental roles such as radio, music retail, photography and more.

**In Their Own Words:** “We give out awards to musicians in over 70 different categories ranging from classical to punk rock in categories like ‘Performer of the Year,’ ‘Artist of the Year,’ ‘Song of the Year,’ etc. Because our organization is designed to support youth programs, at our annual MAMA Awards we also honor a ‘Teacher of the Year,’ a ‘Student of the Year.’ We recognize youth musicians, as well.” Beth Kille, executive producer of the Madison Area Music Association (MAMA) Awards Show<sup>100</sup>

**Relevance for Indianapolis:** An awards show brings performers and community members together, making sure they are personally invested through the voting system. A similar initiative could further connect organizations headquartered in Indianapolis such as Music For All, Drum Corps International and the Percussive Arts Society with students and the industry at the same time. Prizes can benefit other local businesses by offering things such as studio time at a local studio, etc.

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<sup>99</sup> Madison Area Music Association (2019)

<sup>100</sup> Dahmer, D. (2019)

## Recommendation 9. Establish “music career days” to highlight local learning and training pathways

**Initiator:** Arts Council of Indianapolis, Musical Family Tree, Indiana Black Expo, Indiana Independent Venue Alliance, plus local program partners

### Goals:

- Offer modernized and high-quality counselling, models and industry details related to music career opportunities
- Activate and educate youth on the processes and values related to establishing a music career
- Connect students and aspiring professionals to established professionals in their careers
- Initiate interests in developing careers in music, outside of songwriting and performing
- Build relationships with a wider diversity of non-music stakeholders to work with local musicians, e.g. hospitals and health organizations

**Context:** high-school students in Indianapolis have limited career guidance options towards the music industry. People interviewed for the study, including active musicians, recognize little awareness of career paths in the music industry and industry employment opportunities beyond a performance-based artistic career or in music education. They identified this awareness gap exists virtually across the music education sector in Indianapolis: in universities, among high school counselors, and reinforced by a lack of talent spotters in schools. There is a need to educate and engage youth with music business practices and opportunities, offering ideas on how to engage with music outside the realm of artistry and performance (music production, venue ownership, sound engineering).

**Specific implementation considerations:** The Arts Council of Indianapolis should partner with music organizations including the Indiana Independent Venue Alliance, Musical Family Tree and Indiana Black Expo to produce open ‘career day’ sessions for high school students, music students and aspiring professionals, bringing together successful professionals in diverse fields from all parts of the state. These should be developed during school hours and also involve schools and students currently without access to music education, finding synergies with the partnerships suggested in Recommendation 8.

Alongside inviting active musicians and professionals to talk with students, there should be informative sessions from local music education programs including Deckademics, The Recording Conservatory, Azmyth, Bach to Rock, among others; and higher education

institutions offering music degrees in the Indianapolis area (Butler University, UINDY, Marian University, J. Everett Light Career Center, etc.). The program can be trialled for one academic year in 2021-2022 before assessing its continuity in further years.

**Timeline:** Phase 2 (2021-2022)

### Best Practice Case Study - City of Music Career Day (Seattle, WA)<sup>101</sup>

**What Is It:** The City of Music Career Day in Seattle is an educational program providing young people aged 13 - 24 with direct access to music industry professionals in a day event to expand their ideas of the various career paths available within Seattle's music industry. The day program consists of a Keynote Conversation, one Breakout Session, the Meet & Eat Lunch Fair and Table Fair, a Networking Party and Mentor Sessions. 'Breakout Sessions' cover specific areas such as Technology, D.I.Y., Money, Knowledge, Cross-Disciplinary and Artist. The sessions are free to attend, thanks to partnerships with sponsors and speakers.

**Who Is Responsible?** It is developed by the Seattle Music Commission and produced in partnership with local industry bodies such as One Reel, Seattle Office of Film + Music, Seattle Office of Arts & Culture, MoPop, The Vera Project and KEXP.

**What Has It Done?** Coming up on its 10th year, City of Music Career Day has introduced thousands of young adults to the wide range of job opportunities within the local music industry. Due to the success of the previous events, the program has expanded to also include separate career days for literature, visual arts, and film.

**In Their Own Words:** "I can't think of a better event in Seattle for young adults to explore their music career aspirations...One Reel is honored to offer a new generation a place to hone their skills alongside seasoned festival professionals – and to experience the flush of excitement from Seattle festival-goers — albeit from a behind-the-scenes vantage point."<sup>102</sup>  
- Marty Griswold, Executive Director of One Reel

**Relevance for Indianapolis:** Although Seattle is also known for its music heritage, a solid argument for Seattle as a leading music city is the City's support to its local music sector and its investment in developing music programs, services and infrastructure. Indianapolis should maintain this multi-level approach in the implementation of its music strategy so the whole ecosystem of artists, professionals and audiences benefits from its investment. This

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<sup>101</sup> One Reel (2019)

<sup>102</sup> Northwest Polite Society (2019)

initiative could be tied with the youth employment program ProjectIndy.net to feature a special section for music jobs.

## Artist & Industry Development

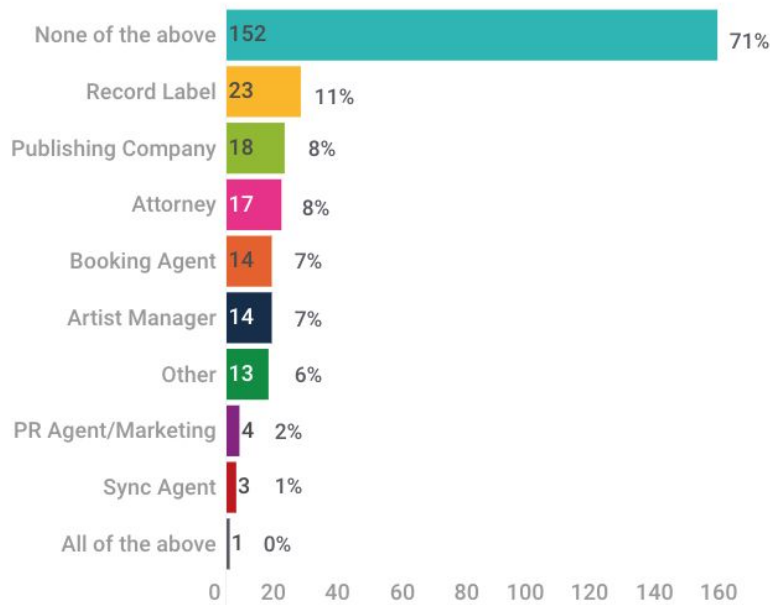
### Indianapolis Music Vision: Music Means Business

#### OPPORTUNITY: INCREASE THE AVAILABILITY OF PROFESSIONAL MENTORING

Survey results revealed that most artists lack a support team, with 71% doing everything on their own (Figure 31), and “Support from music industry” was among the bottom-rated aspects of Indy’s music ecosystem by artists, with only 2 out of 5 stars. In fact, the top skills artists would like to develop are “Music Industry Skills” and “Marketing, social media, audience insights/analysis’, possibly to bridge this support gap.

Among the sample, only 1 out of 3 artists with a music-related university degree received some form of music industry education while in college. All these factors and the current state of the music industry pressures them to become ‘360° artists’ in the absence of adequate skills, connections and professional development support locally, which was also emphasized in open-comments in the survey and during roundtables.

Figure 31. Artist survey respondents with access to a support team



Results show surveyed artists who report any music-related source of income and have any type of support team had a higher average income from all music sources combined (\$11,808) in the past year than those without artist support (\$8,860). This negatively impacts accessibility and equity, too: a larger percentage of female surveyed artists lack a support team (85%) in comparison to males (68%). Although these figures cannot be contrasted to the data from the American Community Survey since it does not ask artists about their access to professional support, these findings reinforce the previous insights from roundtable participants. One respondent highlighted Black artists may want to have mentors and guidance from music professionals who are also Black.

#### OPPORTUNITY: PROMOTE CROSS-DISCIPLINARY MUSIC LEARNING

Looking at skill gaps among artists and professionals, roundtable participants highlighted that many artists lack fundamental career development skills, including adequate mentoring, basics of revenue streams, legal knowledge and marketing skills.

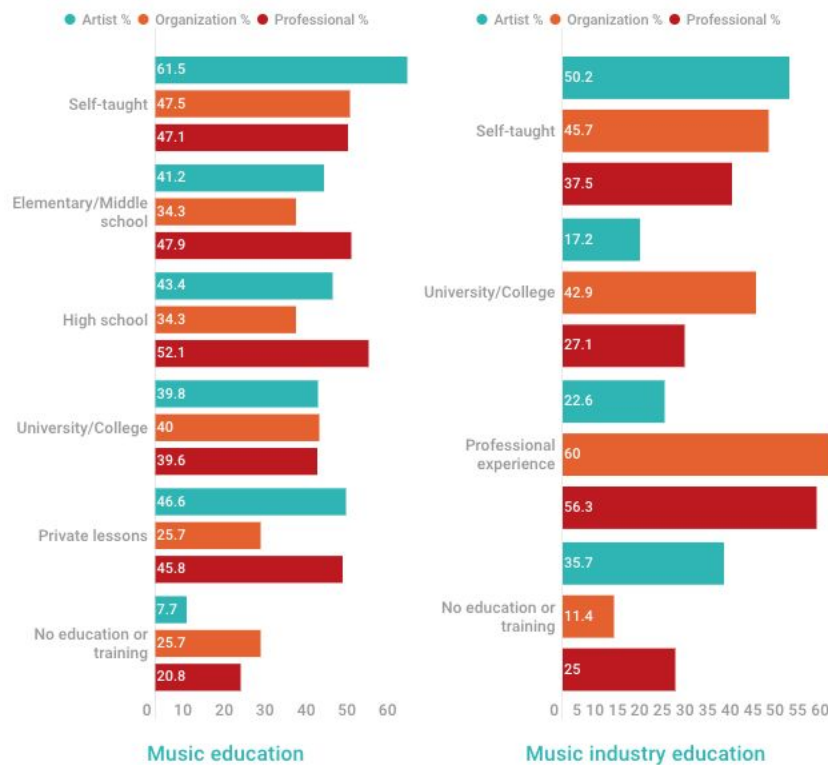


Survey respondents reported gaps related to marketing (as in 1 out of 2 artists, professionals and organizations), and 1 out of 2 artists also reported gaps in social media, audience insights and music industry skills. In the open-comments, respondents also noted gaps in the provision of non-traditional music practice and learning spaces for children, young teens and adults.

Overall, the surveyed sample of artists, professionals and organization managers obtained most of their music-related skills through informal means and practice. Surveyed artists who have not received music education at the college level have developed their craft mainly by self-teaching (70% report this type of education).

Most of the musicians and professionals currently working in Indy’s music ecosystem consider themselves to be self-taught in their music industry skills (50% of artists, 46% of organization managers and 38% of professionals), or have obtained them through professional practice, as Figure 32 below shows.

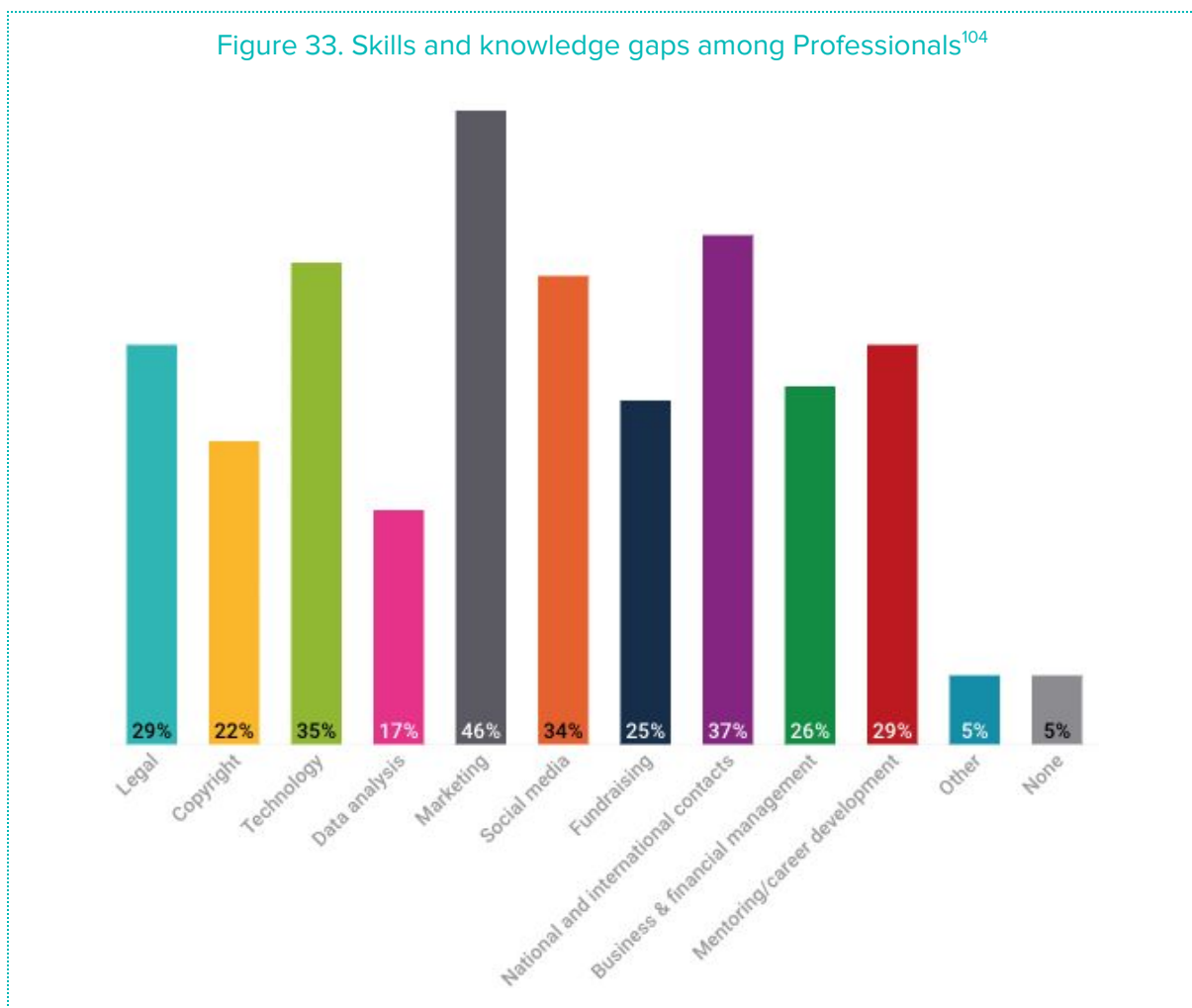
Figure 32. Types of music education attained by Artists, Professionals and Organizations<sup>103</sup>



<sup>103</sup> Respondents could select multiple options at the same time, hence each category can add up to 100%

## OPPORTUNITY: ENCOURAGE CAREER DIVERSIFICATION IN THE MUSIC INDUSTRY

Roundtable participants agreed that music industry businesses and organizations outside of live music are challenged to gain traction in the local ecosystem, and those who grow mainly work out of state. It was repeatedly mentioned there are many sectors and opportunities untapped in the local music economy in a wide diversity of sectors and music genres, such as management, licensing, publishing, scoring, legal, broadcasting, media production, music tech, music therapy, graphic design for music, etc. that would make up a solid and diversified music infrastructure. These educational resources would be leveraged by the 95% of Professionals surveyed who are eager to learn or improve their employment skills (Figure 33), particularly in the areas of marketing, networking, social media and technology.



<sup>104</sup> Respondents could select multiple options at the same time, hence each category can add up to 100%

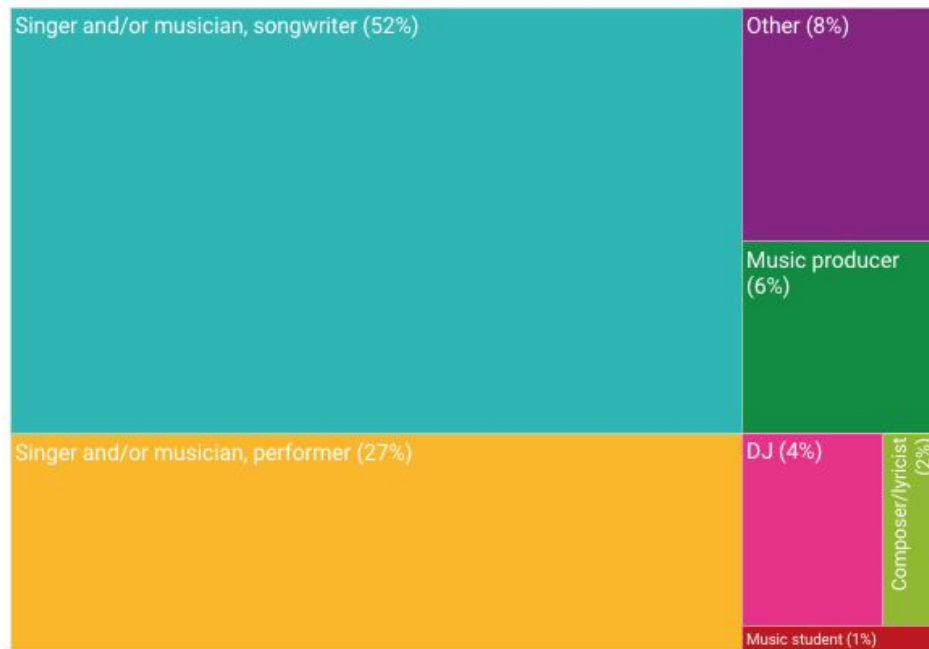
Stakeholders have identified a growing demand for MediCare music therapy programs, but medical corporations based locally are not yet leveraged to retain and attract music therapy professionals, graduates and university students.

### OPPORTUNITY: SUPPORT THE ECOSYSTEM OF LOCAL ORIGINAL MUSIC

At the moment, only 3 out of 5 artists surveyed creates intellectual property and identifies as a 'Singer/Songwriter', 'Composer/Lyricist', 'Producer' and similar roles as shown in Figure 34. Some interviewees and survey respondents argued many local artists looking for easy money tend to do cover acts since these are preferred by venue bookers and audiences, contributing to a cycle that leaves developing original artists outside of the venue circuit.

One interviewee working in music education remarked there are no talent spotters in schools, and few journalists review local bands and their shows. From there, the next key agent that should support original acts are bookers and venues: they need to invest in booking original acts beyond personal networks and referrals, but there is currently little incentive to do this beyond keeping their line-up fresh and relevant.

Figure 34. Artists role self-identification

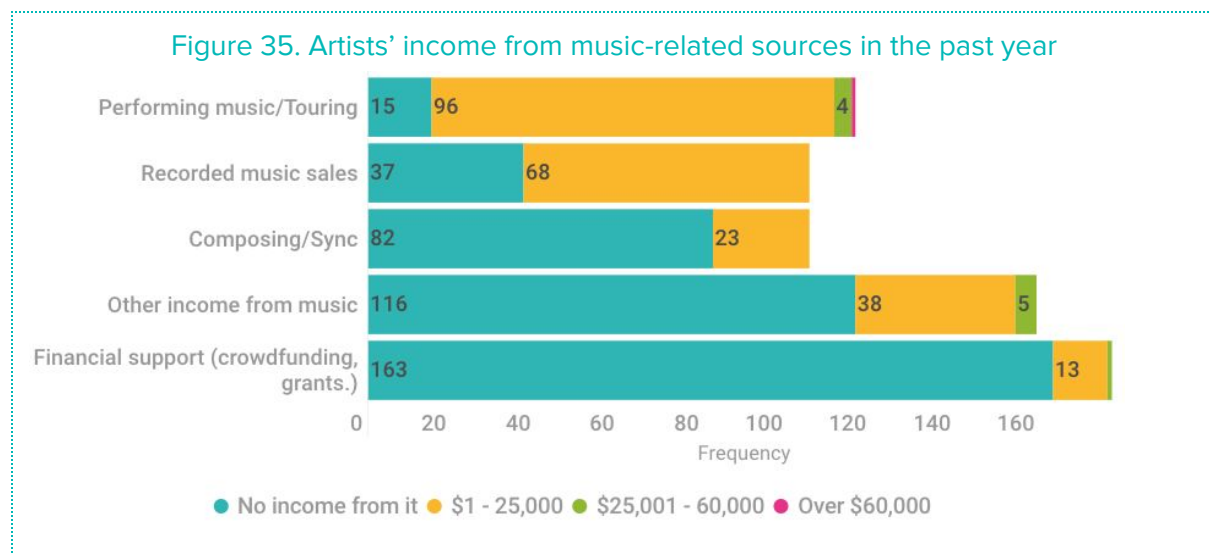


## OPPORTUNITY: ADVOCATE FOR FAIRER MUSICIAN PAY RATES

One survey respondent said the low cost of living distorts the capacity of artists to ask for higher performance fees and progress in their careers, which was reinforced in survey results: both the ratings for “Availability of paid performance opportunities for working musicians” and “Fair payment of musicians” received a neutral-negative rating of 2.5 out of 5 stars.

Roundtable participants confirmed local authorities do not have guidelines to compensate local musicians, while musicians reassured they have participated in public performances for free.

71% of Artists work in music less than 20 hours/week in music, indicating a limited commitment to the development of their music careers. The time commitment is also reflected in the larger dependence on local performances: 95% of the Artists who performed in the last 12 months did so in Indianapolis, 65% of artists performed elsewhere in the U.S., and just 19% had any shows abroad.



Approximately one-third of Artists in Indianapolis are not earning any revenue from their music, such as performance fees, music/merch sales, or composing fees. Most participants involved in the study did not disclose the specific amounts they earned or paid to performers per concert/gig. Considering those who earned anything in the last 12 months, 87% made less than \$25,000 from music, including additional music jobs such as teaching. Local artists seem

to not be able to afford to invest more time in perfecting their music since they have to maintain at least one job outside of the music industry (as in 78% of them).

## Recommendation 10. Expand artist development services and industry training, especially for underserved groups

**Initiator:** Musical Family Tree, Arts Council of Indianapolis, Indiana Independent Venue Alliance, The Build

### Goals:

- Address the needs of local musicians by providing professional development opportunities and music business practices
- Further support full-time music employment through training on career sustainability
- Increase the number of women and gender nonconforming persons, LGBTQ+, people of color and other currently underrepresented groups working in the music industry
- Grow the number of intellectual property creations and creators in Indianapolis
- Attract national music industry organizations to leverage their advocacy power<sup>105</sup>

**Context:** The economic impact points out that the live music sector concentrates 43% of the direct employment in the local industry, despite boasting a substantial number of businesses working in the recording music sector locally (e.g. studios, labels). Live music is the area of the sector hit the hardest by the Covid-19 pandemic measures, and will be the most challenging to recover while social distancing measures are still in place. To address this, Indianapolis is missing a competitive, up-to-date music industry training itinerary for musicians who create original music and to increase the professionalization and productivity of a wider range of careers.

**Specific implementation considerations:** Musical Family Tree, the Arts Council of Indianapolis, the Indiana Independent Venue Alliance and The Build should work collaboratively to create a learning and mentoring program for musicians and music industry professionals, focused on increasing access for women and gender nonconforming persons, LGBTQ+, people of color and other underrepresented groups in Indianapolis' music industry. The learning program should contain free or subsidized masterclasses and short,

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<sup>105</sup> Examples of these organizations available at RIAA (2020) Music Organizations. Online at <https://www.riaa.com/about-riaa/music-orgs/> accessed 2-25-2020

sector-specific learning itineraries available online and updated throughout the year to promote continued education.

The themes for each masterclass and itinerary should be assessed by engaging the organizations' networks of musicians and music industry professionals to identify their most pressing needs at that time (e.g. promoting a live streaming show, learning how to prepare a grant application) and also include permanent itineraries on 1-on-1 topics and the main knowledge gaps that have been identified in the study, including:

- Music business knowledge for musicians and music students (e.g. prepare a press kit, advice for networking, financial management basics, understand different types of contracts, know how to register, publish and license/sync your music, etc.)<sup>106</sup>
- Digital marketing, social media and audience insights/analysis for musicians and music businesses
- Entrepreneurship and business management for music organizations (different sessions for for-profit and nonprofit organizations), including marketing and fundraising tools.
- Sector-specific masterclasses for professionals (e.g. booking agents, festival promoters, artist managers, record labels, music studios, music publishers, entertainment lawyers, etc.)

**Timeline:** Phase 1 (2020-2021) through Phase 3 (2022-2023)

### **Best Practice Case Study 1 - Cincinnati Music Accelerator (Cincinnati, OH)<sup>107</sup>**

**What Is It:** a non-profit organization investing in developing the careers of Cincinnati music creatives since 2017. The program involves two, two-hour classes per week over four weeks around topics such as marketing, media, entertainment law, finance, monetization, storytelling and content creation. Participants can apply online and are selected based on their community involvement and development potential. Selected candidates must be 18 years or older (no age limit) and pay a \$250 fee to enroll.

**Who Is Responsible?** Cincinnati Music Accelerator (CMA) is spearheaded by its founder, native Cincinnati musician Kick Lee. It was launched with the help of a \$10,000 project grant from People's Liberty, a Cincinnati-based family foundation.

**What Has It Done?** Besides accelerating over 20 artists since its launch, CMA is constantly

<sup>106</sup> These topics can be used as a guide to reuse and update the professional development workshops already developed by Musical Family Tree

<sup>107</sup> Cincinnati Music Accelerator (2020)

looking for collaborations. One of these was the Street Stage Project developed with the Cincinnati Center City Development Corp., a 2019 pilot program featuring 30 pop-up performances a week with local musicians, who were CMA alumni, across the city.

**In Their Own Words:** “CMA’s goal is to teach entrepreneurship to music creatives while simultaneously working to end starving artists. We do this by teaching them how to monetize their talent and learn all aspects of the business at a level that’s catered around their craft.”  
Kick Lee, founder of CMA<sup>108</sup>

**Relevance for Indianapolis:** This learning itinerary and format is relatively inexpensive to produce compared to accredited university courses, and the fact participants are pre-selected (and pay a symbolic fee) incentivizes them to remain engaged and motivated throughout the course. It is worth exploring the possibility to create a CMA Indianapolis chapter to benefit from CMA’s expertise and connect both cities’ industries.

### Best Practice Case Study 2 - Groundwaves with Murs (Fort Collins, CO)<sup>109</sup>

**What Is It:** launched in June 2019 as a joint initiative between the prominent rapper Murs and the Fort Collins-based music hub The Music District, Groundwaves is a monthly open mic where aspiring rappers and hip-hop artists from Colorado and beyond can showcase their abilities. Murs and an audience of peers are the judges, and use their expertise and connections to mentor and maximize the potential of the most promising participants, bringing a positive energy and collaboration into the local community. Murs also hosts mentoring sessions, writing exercises and more activities as part of the program.

**Who Is Responsible?** The program was collaboratively set up by Murs, his team and The Music District, with support from the Colorado-based non-profit Bohemian Foundation who also provides funding for the music hub.

**What Has It Done?** The program was tested for six months during 2019. For each monthly installment, dozens of MCs participated, reaching full capacity on its first night (200 people). The Music District’s director said rappers have come from all over the U.S. and even from Spain to participate, showing the program’s interest for the hip-hop community at large. A second series of events is expected to come in 2020.

**In Their Own Words:** “Groundwaves 2019 was a smashing success, in part because of the vision, leadership and invaluable mentorship of Murs, the hard work of our awesome team at

<sup>108</sup> Kdriscoll (2019)

<sup>109</sup> The Music District (2020)

the MD, and most of all because of the amazing hip-hop community that has always existed here in Fort Collins.” Jesse Elliott, Director of The Music District<sup>110</sup>

**Relevance for Indianapolis:** Not all learning happens in classrooms – open mics are a key space for collaboration, innovation and growth in the hip-hop community. Supporting an open mic event by bringing a respected local rapper and pairing it with mentoring sessions, writing exercises and cypher circles will provide more necessary space and resources to develop Indianapolis’ future hip-hop stars.

## Recommendation 11. Activate a “Fair Pay” compensation scheme for artists in Indianapolis

**Initiator:** Indy Music Strategy Committee; Arts Council of Indianapolis; Mayor’s Office

### Goals:

- Outline best practices for the fair compensation of musicians according to Indianapolis’ cost of living
- Set industry standards while Increasing the wages of musicians and professionals supporting artists
- Increase the perceptions on the value of music, viewing it as a good and service
- Lead with good practice in hiring musicians
- Support the work of individuals and organizations leveraging economic equity for musicians in all genres

**Context:** Artists are a foundational component to all music industries and as such, it is important for them to not only feel supported, but to feel connected with the public and properly valued. The low pay for local artists was repeatedly mentioned in roundtables and the survey as a major challenge for career development and economic sustainability, and the significantly lower wages of musicians compared to industry professionals stand out in the economic impact assessment. Surveyed artists highlighted non-unionized musicians lack the leverage to ask for better pay. The artist economy trickles down to the rest of the music industry infrastructure. Therefore, increased public support and awareness on fair artist compensation is critical during and after the Covid-19 crisis, when music live streams are

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<sup>110</sup> Bandwagon (2019)



ever-present and free or tip-based. Indianapolis must address this, or they risk losing talent to other music cities around the world.

**Specific implementation considerations:** In collaboration with representatives of the artistic sector, the Indy Music Strategy Committee should develop a ‘Fair Play’ guide to outline the principles that support local artists, promoters and venues in achieving fairer deals which help creatives and the music ecosystem at large. Such organizations should voluntarily commit to the ‘Fair Play’ principles and must actively avoid pay-to-play bookings. It should highlight best practices including how to cover diversity quotas in programming and how to guarantee the adequate collection and distribution of copyright revenues. A ‘Fair Play’ badge could be designed and displayed as a sticker in the window or as a digital badge for their website, showcasing their commitment to artist development. This should also be taken into account when any municipal or government entities work with these organizations or when any kind of resource allocation or support is decided.

The Arts Council of Indianapolis should be the first organization to pledge for the ‘Fair Play’ principles and support its adoption by the Mayor’s Office/City of Indianapolis to ensure every music activity organized by the city and city-funded organizations abides by these standards.

**Timeline:** Phase 2 (2021-2022)

#### **Best Practice Case Study - Fair Play Guide and Database, UK<sup>111</sup>**

**What Is It:** The Musicians’ Union advocates and promotes activism for musicians in the UK. In 2012, its work led to the Fair Play venue scheme, which aims to “recognize good practice and stamp out the unfair treatment of musicians”. Venues can adhere to the scheme by supporting the fair treatment of musicians and opposing pay-to-play and unfair ticketing deals. The Fair Play guide contains advice for self-promoting artists in areas such as fair co-promotion deals, participating in competitions and showcase events and submitting applications to perform at festivals. Musicians can submit their positive experiences at venues to get the owners involved in the Fair Play scheme. After evaluation, the venues receive a sticker to display as the badge of their respect for artists.

**Who Is Responsible?** The initiative is led by the UK Musicians’ Union, but is supported by the Mayor of London.

**What Has It Done?** As of 2019, the database contains over 130 venues across the UK that

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<sup>111</sup> Musicians Union (2019)

adhere to the scheme.

**In Their Own Words:** “The Fair Play Guide offers advice – to both artists and promoters - on co-promotions, ticketing deals, showcases and competitions, so that musicians can identify when a deal is fair.”

**Relevance for Indianapolis:** Intent is as important as action. Such a scheme, seen as a way to elevate the value of Indianapolis’ spaces and places, will create a more welcoming music ecosystem and demonstrate to artists that all spaces and places are talent development partners, not adversaries. This initiative can be tied to the minimum wage for incentivized projects and the inclusive incentives led by Indy Chamber as part of the Brookings Institution’s Metropolitan Policy Program.

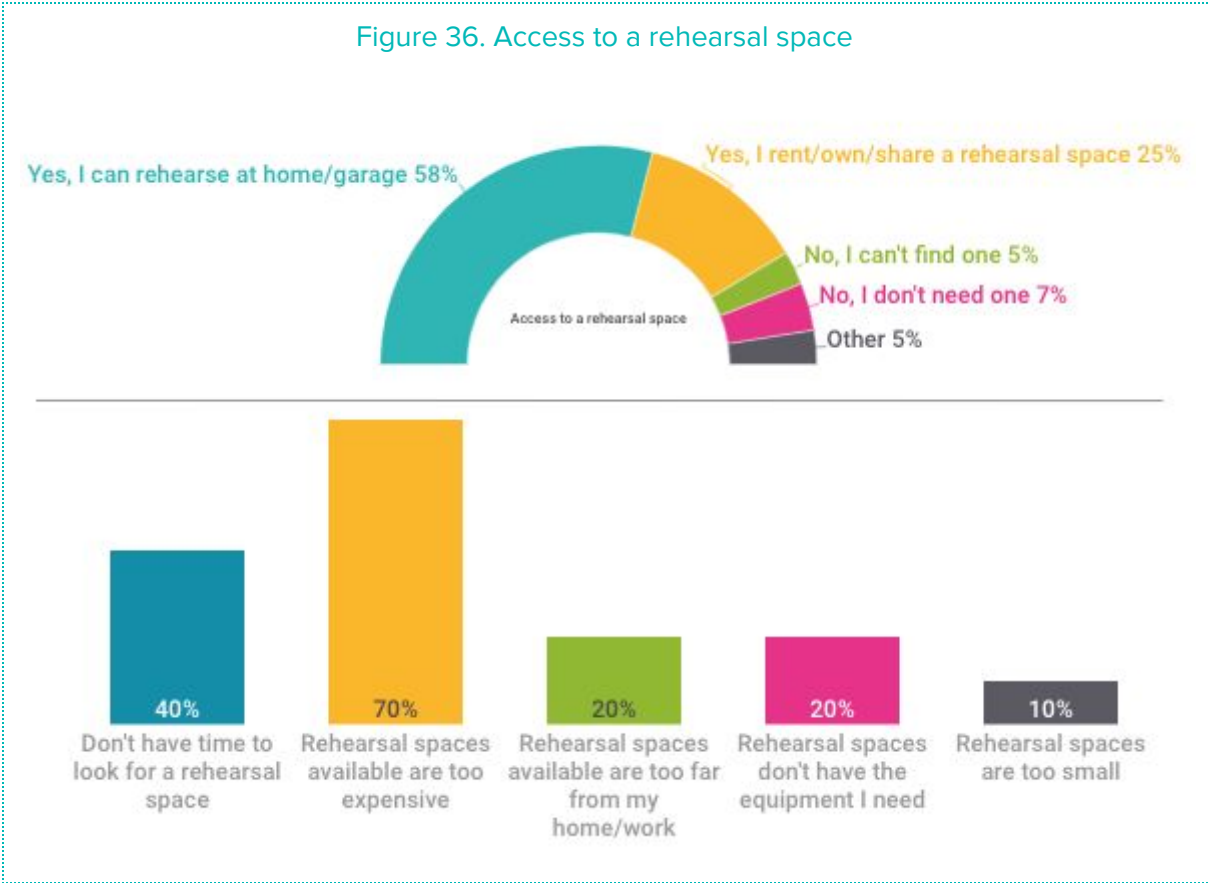
# Spaces and Places

## Indianapolis Music Vision: Music is Infrastructure

### OPPORTUNITY: CREATE COLLABORATIVE REHEARSAL AND PERFORMANCE SPACES

Collaborating between musicians and music industry professionals is crucial to grow artistically and professionally, but also to maintain a healthy and vibrant grassroots ecosystem. The survey indicates that the majority of artists in the sample rehearse at their home or garage (58%), which limits their possibilities to meeting and collaborating with other musicians compared to rehearsing in a shared space (25% of artists rent/own/share a rehearsal space).

Figure 36. Access to a rehearsal space



Part of this lack of access and horizontal collaboration was attributed in interviews to the endogamic nature of Indy's music scene, where the people in bands run record stores, book the festivals and venues, and support each others' shows. The performance opportunities for established artists are the second-best rated aspect of the music ecosystem with 4 out of 5 stars, although the opportunities for emerging artists rank significantly lower (3 out of 5 stars). In contrast to that opinion, some interviewees and open-comments in the survey highlighted an access gap for spaces where genres like hip-hop and Latino music are programmed.

### OPPORTUNITY: ACTIVATE UNUSED SPACES FOR INDEPENDENT PROMOTERS

Survey data shows that most venues rely heavily on selling drinks and food, representing 59% of a venue's (median) income, followed by private rentals, which represent 22.5% of a median income in the surveyed spaces. It was reported by interviewed and surveyed promoters that owning a venue is key to sustain a regular program of concerts, as even with a free space lease independent promoters cannot benefit from food and drink sales.

Although the venue infrastructure in Indianapolis has many different typologies, both the public sector interviewed and the audiences surveyed would like to see more daytime music activations outside of Downtown and in under-utilized spaces and places, such as the White River redevelopment, local monuments and parks. In relation to this, individual respondents also suggested in open-comments to use more empty or underused spaces to host music activities, such as concerts, rehearsals and lessons.

## Recommendation 12. Implement a program designed to utilize non-traditional music spaces in support of audiences and local musicians

**Initiator:** Indy Music Strategy Committee; Arts Council of Indianapolis; Mayor's Office

### Goals:

- Increase opportunities to collaborate in music creation, rehearsal, performance and education across the city's neighborhoods
- Close the space access gap among underserved genres and communities including hip-hop and Latinx

- Facilitate the development of local talents, in preparation for larger music venue performances
- Provide economic development opportunities for independent music promoters, educators and music industry entrepreneurs

**Context:** the survey has identified a gap in collaborative spaces in the music ecosystem, whether these are physical spaces such as jamming spaces, ephemeral spaces such as industry meetings or gatherings, and virtual spaces such as online communities and listings. Roundtables also pointed out certain genres are more challenged than others to find a suitable space to perform and jam, although there were remarks of a growing open mic scene in Indianapolis. At the same time, two age segments feel excluded from attending shows in Indianapolis – older audiences because of late start times and lack of seating at most venues, and persons under 21 for the limitations in access to most licensed music venues.

**Specific implementation considerations:** Indianapolis Arts Council should lead with the implementation of a program to use non-traditional music spaces for music purposes with the guidance of the Indy Music Strategy Committee. First, they should produce information guides for property owners on how to lease their spaces for a safe and successful music event (including the city’s official advice on social distancing and sanitizing measures or any other measures related to Covid-19), including best practices on promotion and organization from the Arts Council. The possibility to offer rebates to owners should also be examined in order to encourage more spaces to sign up.

The Arts Council would become a liaison between owners of a space and agents/organizations interested in using a space for their activities. Interested owners should sign up through the Arts Council and provide information on the space’s characteristics, capacity, equipment, price and activities they’d be willing to lease for. The Arts Council should encourage and prioritize applications from alternative spaces in areas currently underserved by rehearsal, performance and education spaces. The Arts Council should encourage and promote music activities in these alternative venues through existing events programming, such as First Fridays, to trial it.

If the demand and offer of alternative spaces for music activities remains high, the Arts Council should consult the Mayor’s Office on the possibility of extending the program. This would involve setting up an open database and liaison service for music and cultural activities, like the Cultural Space Program in Seattle (see case study below). This would require a larger investment than one-on-one intermediation.

**Timeline:** Phase 3 (2022-2023)

### **Best Practice Case Study - Cultural space program (Seattle, WA)<sup>112</sup>**

**What Is It:** the City of Seattle’s dedicated division to manage and support cultural spaces, providing grants, activating spaces and working together with artists and arts organizations, property developers and builders. Its website features links to resources in other departments that might be useful such as building codes, noise codes, fire safety requirements, and finance and administrative services and incentives. It also contains a comprehensive, easy to use online handbook to help artists and arts administrators navigate all things related to leasing, purchasing and operating a cultural space in Seattle.

**Who Is Responsible?** The Cultural Space program is led by Seattle’s Office of Arts & Culture. It has a dedicated cultural space liaison within the same office, and an arts permit liaison at Seattle Department of Construction & Inspections.

**What Has It Done?** One of its biggest accomplishments was the 2015 launch of SpaceFinderSeattle.org, a free-to-use database of over 400 rental spaces in the region available to artists, community groups and cultural organizations to use for meetings, events, workshops, rehearsals, performances and presentations.

**In Their Own Words:** “Our cultural spaces define the social character of our neighborhoods. They are the bricks-and-mortar portals to the creative vibrancy our city has to offer.” Seattle Office of Arts & Culture<sup>113</sup>

**Relevance for Indianapolis:** A website similar to Spacefinder would be extremely helpful to incentivise the affordable arts space marketplace in Indianapolis since potential tenants have no platform to find appropriate spaces and vice versa. A good place to start is creating a one-stop-shop and an individual liaison for cultural space lease and technical requirements. The online handbook (available on the website quoted in the title) is particularly helpful to understand permit requirements and how to access/lease and relatively easy to replicate.

## **Recommendation 13. Designate a single entity responsible for consolidating all music industry promotions, showcases, and resources online**

**Initiator:** Arts Council of Indianapolis; Visit Indy

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<sup>112</sup> City of Seattle (2020)

<sup>113</sup> Seattle Office of Arts & Culture (2017)

**Goals:**

- Create a comprehensive public directory of music businesses and spaces in Indianapolis
- Increase capacity and activity for existing resources in the music sector
- Encourage visitors to use, book and/or purchase local music and local music services
- Recognize Indianapolis' music assets and music identity to help build a reputation of music city

**Context:** At the moment, there is no comprehensive listing of music venues, music industry professionals and musicians in Indianapolis. Interested parties would need to check general sites such as Yellow Pages, Yelp or Google Maps to find out the space or professional they're looking for. Some organizations already feature music sector databases that could be piped into an online information hub, such as the directories at Arts Council and Visit Indy or private websites like Do317 and Musical Family Tree. The mapping noted less than 50% of local music venues have publicly available information on their capacity and/or backline, which challenges local and touring acts to find a suitable venue to perform. When information is spread across many channels, it creates a barrier to audiences, and in some cases, de-values the industry as a whole. It is critical for audiences to receive convenient, easily-accessible information to music-centred events, showcases and performances.

**Specific implementation considerations:** The Arts Council of Indianapolis and Visit Indy should coordinate the setup and maintenance of an online platform that includes a comprehensive directory of artists, music businesses and spaces in Indianapolis available for hire. Partnering with organizations that already have such directories, this database should serve both the touring acts and companies looking to perform in (or hire services from) Indianapolis, as well as locals who want to book a band or a venue for a private engagement or take music lessons, for example. The website should have an attractive and easily accessible design and actively promote its existence to the local music ecosystem to register their business, space or musical act. In addition, the website should also include opportunities for the music industry.

It should be assessed whether this platform could be categorized as a nonprofit organization that could be eligible for arts and cultural funding. The platform should be free to list, but a premium feature may be added where organizations or bands can be featured prominently with photos or videos.

**Timeline:** Phase 2 (2021-2022) through Phase 3 (2022-2023)

## Best Practice Case Study - Memphis Music Hub (Memphis, TN)<sup>114</sup>

**What Is It:** A new section of the Memphis Travel website, the Music Hub,<sup>115</sup> was added in order to showcase Memphis' vibrant music scene. Prospective visitors and music fans can use the site to stay up to date concerning music events and venues, even inquire about booking Memphis artists.

The website also includes a Music Resources page, listing local recording studios, record labels, music shops, retailers, media, schools, non-profits, booking agents and music venues, including their capacity.

**Who Is Responsible?** Memphis Tourism, the destination marketing organization for Memphis, Tennessee & Shelby County.<sup>116</sup>

**In Their Own Words:** "Memphis' identity has a unique musical spirit. Today's Memphis musicians are as prolific as it's legacy, innovating and blending genres, laying new paths for musicians around the world. Music Hub serves to connect our current local musicians, music venues, and music organizations with our city's visitors."

**Relevance for Indianapolis:** Memphis' online music hub serves a twofold purpose, on the one hand as a one-stop-shop for visitors who are interested in experiencing and learning more about the music culture in Memphis, but also as a hub for the public and industry professionals who want to hire a Memphis artist or producer, book a local venue or sign up for a music lesson. The attractive design and easy-to-use layout makes it a best case for Indianapolis, which could similarly create a simplified version of the page in Visit Indy's website as a starting point.

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<sup>114</sup> Memphis Travel (2020a)

<sup>115</sup> Memphis Travel (2020b)

<sup>116</sup> Greene, A. (2020)



## Audience Development

### Indianapolis Music Vision: The Music Ecosystem is Vast

#### OPPORTUNITY: EXPAND THE REACH OF LOCAL MUSIC IN MEDIA

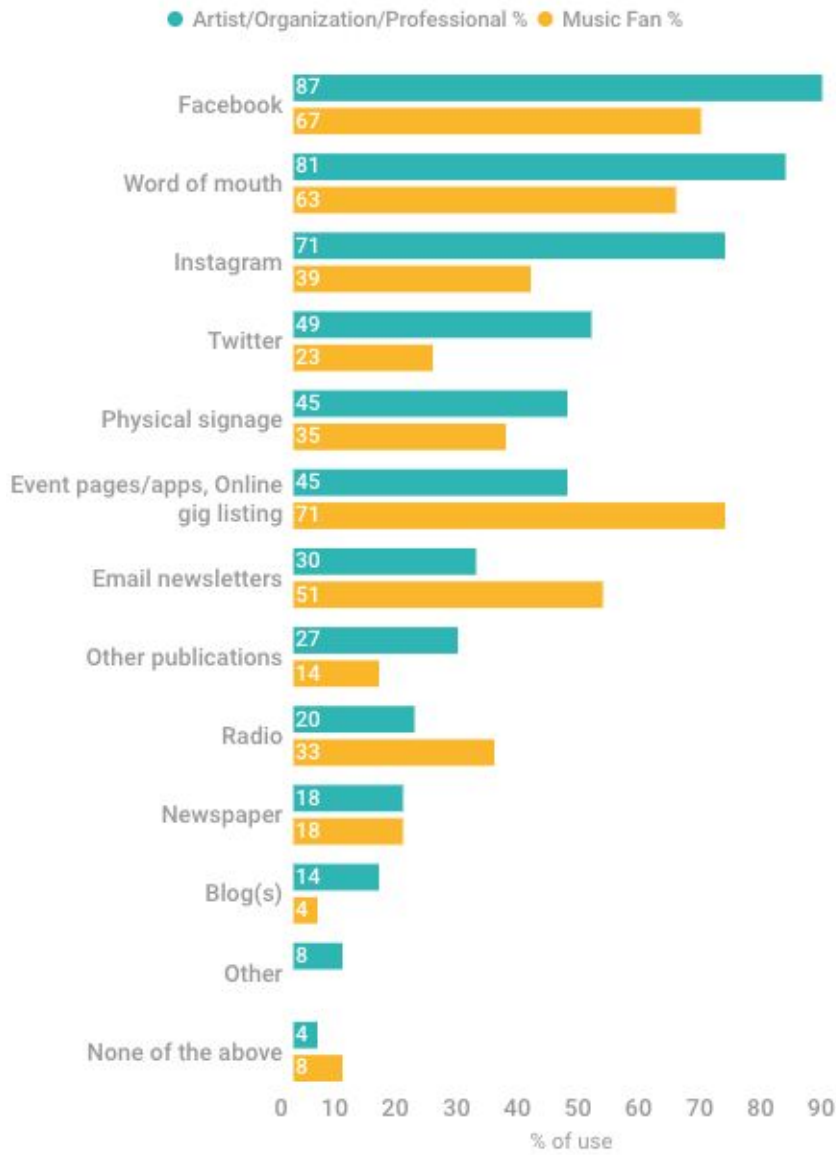
Surveyed music fans are highly interested in music by local artists (as of 86% of the sample), but say they are challenged to find out about music events with local artists (38% said it is 'Neutral', and 27% said it's 'Difficult' or 'Very difficult'). Roundtable participants had previously explained the circular trend: local media is dependent on advertising money, which challenges their capacity to promote local talent and local artists' shows. Although the 'Quality of local artists' talent' was the third-most positive survey rating of the music ecosystem with 4 out of 5 stars, the 'Media coverage of local music scene' obtained a neutral-negative rating of 2.5 out of 5 stars.

Radio is an underused promotional platform, likely due to a high entry barrier imposed by radio corporations in Indy, not having PR representatives, and the absence of alternative media that is equally impactful, as reported by survey respondents. Radio as a key gatekeeper was also brought up in relation to cover bands' popularity in Indy. Stations program classic rock, indie, country and Top-40 pop playing the same old and new artists repeatedly; having a cover act means people will be more drawn to hear that music than original songs from an artist they don't know.

Another under-used resource are event listing pages (used by 71% of music fans but only 45% of artists and industry). Besides listings, interviewees and respondents highlighted there are local publications, journalists and podcasts that have pride and focus on promoting local talent, but they are not able to attract larger audiences: only 4% of music fans reads blogs and 14% reads publications (excl. newspapers) to find music activities.

Local media channels should also acknowledge the rich music culture emerging around Indianapolis' immigration population, in particular the Latinx community on the west side of Indianapolis, as well as music made by the local Black community and their musical legacy that is still alive today.

Figure 37. Promotional methods for music activities used by survey respondents<sup>117</sup>



## OPPORTUNITY: FACILITATE PARTICIPATION IN MUSIC ACTIVITIES

Many roundtable participants, interviewees and surveyed Artists expressed the frustration that local audiences don't actively pursue or prioritize live music entertainment, instead choosing

<sup>117</sup> Respondents could select multiple options at the same time, hence each category can add up to 100%

other forms of leisure or waiting until the last minute to purchase tickets. Despite this cultural characteristic, surveyed music fans are attending shows (approximately 1 out of 2 goes once a month or more frequently), and happily spend a yearly average of \$517 on concert tickets and \$240 on festival tickets. However, several core factors appear to be holding people from participating in more music activities: media promotion (mentioned in the previous strategic area), late start times, comfort, and audience behavior.

Start times appear to be a great hurdle for audiences interested in attending weekday shows, with many shows starting at 9 pm and later. Because of its location between major cities, Indy seems to typically get big-name concerts during weekdays, challenging people who need to work early the next day. This challenge is reinforced in the survey's results: 56% say they "lack the time" to attend more shows that they would like to, while open-comments suggest increasing the number of music venues and activities outside of the existing entertainment districts to reduce travel times.

Meanwhile, marketing and media presence reinforces attendance and expenditure for touring acts people know, instead of discovering local acts. Survey data shows a considerable preference for established national artists over local talent discovery, with audiences willing to pay double or triple the price to see a U.S. or international renowned artist than an act they don't know.



## Recommendation 14: Support the broadcast of contemporary local music on public radio

**Initiator:** WFYI, Arts Council of Indianapolis, Big Car Collective

### **Goals:**

- Expose more local audiences to a wide variety of local contemporary music
- Incentivize musicians to produce high-quality original music and promote it outside of social media
- Increase the representation and airplay of local music in WFYI radio programs and other public broadcasting channels
- Aid artists in garnering local fans and opportunities to connect with the broader music community
- Grow critical conversations in media around local artists and events
- Lead advocacy to include more local, radio-ready talent in commercial radio
- Support partnerships with non-music sectors

**Context:** music access is at an all-time high, as streaming services are in abundance and competition is vast across all genres and age groups. Song exposure and promotion is key when trying to establish a music career. Currently, mainstream media outlets rarely feature local artists and music activities. Radio, event pages and email newsletters are underutilized communication channels, according to the surveyed sample of musicians, organizations and audiences. Certainly, only a very limited amount of media outlets support local music content, with public radio showing the biggest opportunity for expansion.

**Specific implementation considerations:** The Arts Council of Indianapolis should develop a fund that incentivises the promotion of the local music ecosystem on terrestrial and digital radio, in collaboration with radio partner WFYI radio. This fund should subsidize the production and broadcast of shows where local artists are prominently featured, particularly artists in less-represented genres in the local live music circuit including hip-hop, rap and noncommercial music, as well as featuring underrepresented demographics of local musicians including people of color, women, gender nonconforming and LGBTQ+ artists. The setup of the fund should be discussed with local radio stations and organizations that would potentially benefit, including Big Car Radio, WQRT, WTTS and La Grande.

**Timeline:** Phase 1 (2020-2021) through Phase 2 (2021-2022)

**Best Practice Case Study - Public Urban Alternative Stations (Denver, CO, Houston, TX, Norfolk, VA and Chicago, IL)<sup>118</sup>**

**What Is It:** Colorado’s public radio KUVO received a \$350,000 grant to add an urban alternative station, The Drop, to draw a younger and more racially diverse audience to public radio. KUVO’s main radio broadcast remains focused on jazz, blues, news and culturally diverse programming while the new station also includes a 24/7 broadcast on the KUVO website, app and streaming services. Live performances are also recorded for broadcast on radio and Rocky Mountain PBS’s weekly arts program, and the station collaborates with community events and music festivals.

**Who Is Responsible?** Rocky Mountain Public Media, Colorado’s largest statewide member-supported multimedia organization, received the grant from the Corporation for Public Broadcasting (CPB). CPB also gave \$500,000 grants to two other stations in Houston, TX and Norfolk, VA for the urban alternative initiative.<sup>119</sup>

**What Has It Done?** The format has been praised in the industry since it has an 8.2 appeal rating (out of 10) nationally and 77% of all 18-44s said they would listen to an Urban Alternative station. The key to the success of The Drop are the passionate and knowledgeable hosts and the focus on local artists. As a public station, music lyrics must be appropriate for all ages, making it appealing to wider audiences than commercial Urban radio stations.<sup>120</sup>

**In Their Own Words:** “We anticipate engaging Coloradans with an exciting blend of their favorite and old-school artists, while providing a platform for new and Colorado-based musicians as well. The audience consuming R&B and hip-hop is so vast and so hungry for dynamic experiences in music, we want to fill that void.”<sup>121</sup> Nikki Swarn, PD for KUVO

**Relevance for Indianapolis:** The hip-hop music scene is exploding with talent in Indy, but artists lack adequate platforms to grow their audiences. Having dedicated channels, such as a public urban radio station or different programs allocated on WFYI to promote urban music, including hip-hop, R&B, pop-rap and contemporary Latin urban, all popular genres in the U.S. market. Increasing the media outreach of these genres and communities will help them increase the demand for shows in the local market, growing the number of venues and events serving those genres in Indianapolis and supporting artist development.

<sup>118</sup> Rocky Mountain PBS (2018)

<sup>119</sup> Janssen, M. (2018)

<sup>120</sup> Henry, M. (2019)

<sup>121</sup> AllAccess.com (2019)

## Tourism & Reputation as a “Music Place”

### Indianapolis Music Vision: Music Connects Past, Present and Future

#### OPPORTUNITY: CO-CREATE MUSIC NARRATIVES AROUND INDIANAPOLIS’ CULTURES

Roundtables with all kinds of participants agreed Indianapolis lacks a coherent narrative around music. Music organizations have been key to bringing talent that is unique to Indianapolis, but there has not been a general buy-in or co-creation process of a music brand or identity that represents the diverse music communities and rich heritage that Indianapolis has.

The first step to involve the music community will be to amend the “Reputation of Indianapolis as a music place” and the “Collaboration with regional tourism authorities”, two bottom-rated areas in the survey with 2 out of 5 stars. Music fans went so far as to rate the city’s music place reputation as the worst asset in the ecosystem, giving it 2.5 stars (see Figure 38 below). Involving Indy’s music sector and communities will be the first step towards creating a narrative that represents everyone.

Figure 38. Overview of highest and lowest music ecosystem ratings

BEST RATED INDIANAPOLIS MUSIC ECOSYSTEM AREAS [all respondents]\*



WORST RATED INDIANAPOLIS MUSIC ECOSYSTEM AREAS [all respondents]\*



BEST RATED INDIANAPOLIS MUSIC ECOSYSTEM AREAS [music fans]\*



WORST RATED INDIANAPOLIS MUSIC ECOSYSTEM AREAS [music fans]\*



\* Rating range 1-5, where 5 is 'very good' and 1 means 'very poor'.

## OPPORTUNITY: INTEGRATE MUSIC HERITAGE IN INDY'S STORYTELLING

The displacement of the Black and African American community in Indianapolis has been remembered by roundtable participants, interviewees and survey respondents for its historic unrecognition by local authorities. The 1960s triggered the current displacement of music communities with the construction of the interstate and the establishment of IUPUI, while Unigov in the 1970s had a massive impact in the disappearance of many music heritage venues and businesses. Survey respondents widely support the city's music heritage as one of its best assets, rating it with 3.5 out of 5 stars.

Roundtable participants, interviewees and survey respondents agreed Indy's colorful and diverse music scenes are currently not captured in the city's communication or identity, which focuses more on what is new or the "next big thing". One roundtable participant mentioned all the local great jazz players in the first half of the 20th century were also venue owners and lived in the same neighborhoods, which created a vibrant scene around Indiana Avenue. Several organizations and individual stakeholders that were interviewed for the project lament the lack of support from local authorities in reclaiming and celebrating Indiana Avenue and other aspects of Indy's musical past, as public support and fundraising are crucial to advance in restoration, archiving, research and regeneration activities.

### Recommendation 15: Memorialize Indianapolis' historically significant sites and musicians in jazz, blues and other genres

**Initiator:** Arts Council of Indianapolis, Indiana Historical Society, City of Indianapolis

#### Goals:

- Recognize and honor the historic contribution of Indianapolis' musicians and industry professionals
- Actively promote and broadcast the historical music identity and heritage
- Acknowledge the local legacy of Black musicians and the Black music industry, involving its stakeholders present and past
- Harness storytelling through music, connecting locals and tourists to the social and cultural legacies found throughout all of Indianapolis' creative industries.
- Integrate the music sector in Indianapolis' heritage tourism routes



**Context:** A musical identity and heritage is a vital asset to any music ecosystem, and becomes the foundation for a city's uniqueness and attractiveness. Many people in the music ecosystem who have been touched by this project feel the city's music heritage and the people who made it possible has been left out of the city's storytelling for too long. During the project, different stakeholders have reached out to highlight individuals changing this trend, such as the artist and community leader Wildstyle Paschall,<sup>122</sup> DJ and journalist Kyle Long,<sup>123</sup> and author David Williams among other voices who lived and/or tell the history of Indianapolis' music and need to be amplified. The Indiana Historical Society and the Madame Walker Legacy Center are leading organizations in restoring and promoting Indianapolis' music heritage, while other emerging initiatives are raising funds to get started, such as the Indianapolis Entertainment Foundation.

**Specific implementation considerations:** The Arts Council of Indianapolis should liaise with the Indiana Historical Society and the City of Indianapolis to memorialize its historically significant sites and the historic contributions of Black musicians and the Black music industry. As a first step, they should create a registry/database of historic music spaces and places, including venues, businesses, and places of inspiration or referenced in songs by artists. This archive of all relevant music assets should be summarized in a guided itinerary for visitors and locals to discover the region's musical story, both physically and historically. Physical spaces should include special signage informing of the relevance of the place or person to the music of Indianapolis (see case study below).

The archiving and documentation process should include digitising old music records and music scripts, while ensuring originals are well preserved. When permitted under the right holders' will, such heritage records should be available online for everyone to promote the region's heritage and to trace the evolution of different music genres as the area's culture came to be what it is today.

**Timeline:** Phase 1 (2020-2021) through Phase 2 (2021-2022)

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<sup>122</sup> Paschall, W. (2020)

<sup>123</sup> WFYI (2020)

### Best Practice Case Study - Mississippi Blues Trail<sup>124</sup>

**What Is It:** Although primarily centred around the state of Mississippi, this collection of sites that bear historic significance to the local blues scene (and further, the global blues scene), includes a few out-of-state sites in places such as Chicago, Cleveland and Muscle Shoals. The trail is accessible via iOS and Android apps, on the official website or by requesting a physical map brochure online. Each platform directs users to the sites and gives them a summary of their significance. There is also a calendar available which collects blues-related events happening along the trail for users to coordinate their travel dates with.

**Who Is Responsible?** The Mississippi Blues Commission (MBC) and Mississippi Blues Foundation (MBF), which also operate other initiatives to support and preserve the blues scene, including the Mississippi Blues Trail and the Benevolent Fund.

**In Their Own Words:** “Whether you're a die-hard blues fan or a casual traveler in search of an interesting trip, you'll find facts you didn't know, places you've never seen, and you'll gain a new appreciation for the area that gave birth to the blues.”

**Relevance for Indianapolis:** The Mississippi Blues Trail is a widely recognized music heritage and tourism initiative, and Indianapolis should submit Indiana Avenue to be incorporated in the trail. Besides this, a similar initiative highlighting music heritage sites with plaques or symbolic monuments could be integrated in the existing Indy Cultural Trails, particularly in Indiana Avenue.

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<sup>124</sup> Mississippi Blues Trail (2019)

## Recommendation 16: Produce a documentary exploring the relationship of local musicians and organizations with the city

**Initiator:** Visit Indy, Music Crossroads, Arts Council of Indianapolis, Indianapolis Film Office

### Goals:

- Make local artists and organizations a core element of Indy's music city brand
- Leverage existing resources and previous best practices in music promotion
- Grow the presence of music and cultural assets in the city's promotional materials
- Draw attention to emerging and established musicians and locations among the general public
- Connect inter-industry actors to encompass a broader examination of Indy's local creative industries

**Context:** NoMeanCity had an outstanding collaboration in 2016 with local spoken word poet and hip-hop artist Tony Styxx for a tribute "Indianapolis" video, which totals around 13,000 views as of March 2020.<sup>125</sup> Visit Indy launched four episodes of music documentary shorts called "Naptown Sounds" in 2019, still available via Visit Indy's Youtube channel.<sup>126</sup> The shorts are high-quality, and the content and production value of this series makes them highly attractive for promotional and educational purposes. However, the videos had a limited impact on general audiences, with the most popular video (for hip-hop festival Chreece) counting short under 800 views as of March 2020. These past experiences can be used to identify where music marketing efforts excelled or disappointed and re-launch similar content to promote Indianapolis, its music scene and its heritage. Relying on the successes, as much as the failures is essential, and will also help connect with more audiences.

**Specific implementation considerations:** Visit Indy, in collaboration with Music Crossroads and the Arts Council of Indianapolis, should create a brief/open call for proposals for filmmakers to produce a music documentary that engages local artists. It should promote the city's music from three main angles: its diverse creative ecosystem of musicians and performers at the present time; the historic relevance of the Black music community, focusing on the history of Indiana Avenue; the leverage of its music organizations and their national competitions.

The documentary should be informative, but it should also promote Indianapolis' music culture and assets to locals and prospective tourists who want to visit the places shown in the

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<sup>125</sup> No Mean City (2016)

<sup>126</sup> Visit Indy (2019)

documentary and listen to local music in a live concert setting. Visit Indy should work with the Indianapolis Film Office to submit the film to international film festivals and support its promotion on a local level to gain exposure of Indianapolis music, past and present.

**Timeline:** Phase 3 (2022-2023)

### **Best Practice Case Study - Great American Music Video (Chattanooga, TN)<sup>127</sup>**

**What Is It:** The Chattanooga Visitors Bureau created a special music marketing campaign for the 75th anniversary of Glenn Miller’s song “Chattanooga Choo Choo” in 2016. The campaign launched a music video featuring 12 diverse local bands and musicians, shot in several landmarks and venues around town and using a local band’s song as the story’s theme.

**Who Is Responsible?** The Chattanooga Visitors Bureau’s music marketing manager

**What Has It Done?** The video has over 32,000 views as of 2020. In 2017, the CVB calculated 44% of visitors were motivated to visit for its music and festivals, and 64% of visitors were satisfied or very satisfied with the music scene. Overall, it had registered a 72% growth of live music attendees between 2013 and 2017.<sup>128</sup> Although the metrics have not been recently updated, in 2018 the CVB stated 70% of Chattanooga advertising and promotions include cultural tourism.<sup>129</sup>

**In Their Own Words:** “I think the biggest thing is no matter where I go-and I’ve heard the same from others-when people ask where you’re from and you say Chattanooga, they think of the Choo-Choo...People all across the world identify us by that song.” - Adam Kinsey, Chattanooga Choo-Choo president<sup>130</sup>

**Relevance for Indianapolis:** Although this case study is less ambitious than the proposed local music documentary for Indianapolis, it shows how the Chattanooga CVB successfully engaged the breadth of the music community and its heritage to bring attention to its music city brand. The short video is easy to share and highlights 10 different musicians with a catchy theme tune. It is easy to share and to incorporate in a paid media campaign, maximizing its appeal to wider audiences.

<sup>127</sup> Chattanooga Tourism Co. (2016)

<sup>128</sup> Chattanooga Convention & Visitors Bureau (2017)

<sup>129</sup> Chattanooga Convention & Visitors Bureau (2018)

<sup>130</sup> Nooga Today (2016)

## Indianapolis Music Vision: Music is an Experience

### OPPORTUNITY: ELEVATE EXISTING ASSETS THROUGH PARTNERSHIPS

One roundtable discussed that the capitalization of marching bands in Indianapolis was based on supporting music non-profit organizations (an unlikely profit generator) and creating an ecosystem for these bands and organizations to thrive by also bringing sports organizations like USA Football. Existing partnerships that set up a good starting point are the Indiana Pacers in-game concerts alongside Musical Family Tree and the Arts Council, or the unfortunately cancelled IN the Game Block Party, which should have been taken place in March 2020 and was a partnership between Chreece, Indy Brew Bus, Sam Ash Music Stores and Indiana Sports Corp.

Indianapolis has a world-famous brand thanks to its investment and partnerships in the sports sector, most visibly in the Indy Speedway and Indy 500, which could set a foundation to build music and sports partnerships in tourism. There are several individual acts, venues, festivals and music companies, among others, that have achieved considerable success both locally and across the US and can help spread the good word about Indy. One of the main challenges to leverage this, according to roundtable participants, is to find appropriate mediation between artists and funding institutions or individuals.

### OPPORTUNITY: CONNECT INDIANAPOLIS WITH MUSIC

The worst-rated asset in the music ecosystem according to Music Fans is the 'Public transportation to music venues/festivals within greater Indianapolis' with 2.5 out of 5 stars, highlighting the challenges in connecting the city to the surrounding towns. Respondents said to drive or take public transport for 30-60 minutes on average to see a show, which challenges their capacity and ability to attend concerts.

It was a recurring topic in roundtables, too: Indianapolis' expansive nature and planning regulations have created micro-scenes around venues where music audiences and jobs coalesce, which create accessibility challenges due to the lack of efficient and affordable

transport options. At the same time some people are excluded from participating, these pockets of activity grow a sense of musical pride in the areas that flank downtown.

Surveyed Fans and Artists suggested developing more city-led busking initiatives, such as the successful IndyFringe busking program, to connect city neighborhoods with music and create a feeling of community. This is something that could be leveraged with the new Red Line, which is expected to improve the connection between residents and those siloed music offerings. This was the foundation for IndyGo Music in Transit, the program that showcased 20 local acts in a series of concerts at Red Line stations during September 2019, in partnership with Square Cat Vinyl and the Arts Council. This strategy to enliven and connect public spaces through music was also acknowledged by public sector roundtable participants, who say they want to activate the White River area, Downtown plazas and monuments with live performances in the near future.

### Recommendation 17: Introduce a paid busking scheme in tourist hotspot areas

**Initiator:** Arts Council of Indianapolis, Indianapolis Cultural Trail, Downtown Indy Inc.

**Goals:**

- Lead with good practice and support to encourage more public performances across Indianapolis
- Establish proactive policies to avoid noise complaints and busking obstructions in high-traffic areas
- Increase paid performance opportunities and promotional opportunities for local musicians
- Improve the perception and visit time to Downtown Indy by encouraging foot traffic and a lively atmosphere
- Engage downtown visitors to discover, listen to and purchase local music

**Context:** Public performance and buskers add significant value to the overall reputation of a city. The appeal and vibrancy created through busking is beneficial for the economy, alongside the cultural and social appeal, and should be regulated to ensure it maximizes all three of these areas. Currently, busking is allowed on public property in Indianapolis, which is already a regulatory advantage compared to other large U.S. cities. The city has launched different paid busking programs in the past, focused on downtown areas and gaining support from audiences and the music community. Interviewees highlighted the Downtown Indy Buskers pilot program in 2014 and the collaboration with IndyFringe yearly since 2014. Currently, the positive disposition from Downtown Indy Inc. to increase busking and street

entertainment could be leveraged by the Indy Music Strategy Committee to develop more paid busking programs. This would complement the current offer of music activities offered by other organizations that pay artists but are free to attend, such as the ArtsGarden lunchtime concert series (managed by the Arts Council).

**Specific implementation considerations:** The Arts Council of Indianapolis should spearhead the creation of a paid busking program in partnership with the Downtown Cultural Districts (Downtown Indy Inc.) and the Indy Cultural Trail, to showcase the city’s music and music heritage in the trails’ storytelling. This program should follow the structure and logistics of the previous busking programs, including artist remuneration and the allocation of dedicated stations for performers near key sites for visitors, ideally with access to electric plugs to allow for music amplification. Specific timeframes should be allocated for performances during the week (see case study below) to make sure performers have a significant audience volume.

The success of the initiative should be measured during the first year of its implementation through consultations with locals and visitors who experienced the program, as well as artists participating in it. After a one-year trial, the partners should decide whether it can be extended another year, and/or what characteristics of it should be adapted to continue.

**Timeline:** Phase 2 (2021-2022)

### Best Practice Case Study - Minneapolis’ paid busking program<sup>131</sup>

**What Is It:** The Minneapolis Downtown Improved District (DID) has created a program to encourage and support local artists that want to perform in the streets. Busking is legal in Minneapolis as long as it takes place on public property, doesn’t obstruct traffic and adheres to noise ordinances but many performers find they either feel unwelcome or don’t make any money for their offering.

DID is a non-profit funded by commercial property owners that develops initiatives to make downtown Minneapolis safer, cleaner and more welcoming. In order to encourage a vibrant atmosphere, DID set up Street Show during the summer of 2018. Through this program, sidewalk entertainers are able to hold performances in two main areas of the city, Nicollet Mall and Hennepin Ave, during lunch hour, rush hour and the early evening on Wednesday, Thursday and Friday. This includes a wide range of performances including musicians, mimes, poets and hula hoopers.

They are guaranteed a payment of \$50 an hour (or more if performing in a duo or trio) plus any tips made from the audience. They are also given a wagon, with Street Show signage, to

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<sup>131</sup> Star Tribune (2018)

transport their equipment as well as a battery-powered amplifier.

**Who Is Responsible?** The Minneapolis Downtown Improved District (DID)

**What Has It Done?** With over 550 hours of performances, the total cost of the program in 2018 was about \$55,000. In one of the areas, Nicollet Mall, 100 different groups and individuals participated.

**In Their Own Words:** “Everyone loves a good show—we asked people what contributes to a vibrant downtown experience and found that street performance is always near the top of the list... Street Show trains performers on the rules for safely busking downtown and encourages audiences to support performances they appreciate.”<sup>132</sup>

**Relevance for Indianapolis:** Indianapolis can further push having recorded music and live performances embedded into its tourism assets. The strategic timing of the performances in Minneapolis during the day and on weekdays added to the good stipend ensures a wide diversity of artists are motivated to perform and contribute to a lively atmosphere downtown and in other high-traffic areas.

## Recommendation 18: Support the promotion of multi-day signature events and venues showcasing local talent

**Initiator:** Visit Indy, Music Crossroads, Arts Council of Indianapolis, Indiana Independent Venue Alliance

### Goals:

- Attract music tourists to Indianapolis
- Celebrate and support the existing music assets Indianapolis has
- Amplify the success of local multi-day music events as overnight tourist attractors
- Provide national and international exposure opportunities to Indianapolis’ musicians and festivals
- Offer opportunities for multi-industry collaboration
- Expand the music industry knowledge and network capabilities of local artists and organizations

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<sup>132</sup> On Nicolett (2020)



**Context:** It is important to recognize that the success of this recommendation is predicated on the ability to partner and promote within the industry, rather than create a competitive divide. Cohesiveness amongst the industry -promotional agencies and event hosts included- is essential throughout this process. At the moment, most of the marketing and promotion of Indianapolis' multi-day events is done individually without coordination or promotional support from Visit Indy, with few exceptions who proactively reached out to the organization. This is an untapped opportunity for both Visit Indy and for established and emerging festivals, particularly multi-day festivals, to engage larger visitor audiences.

**Specific implementation considerations:** Visit Indy and Music Crossroads should allocate a percentage of their resources for event promotion towards multi-day music festivals programming local artists. This allocated support should include financial resources (e.g. matching grants, subsidies of advertising costs, depending on the event) and in-kind resources, such as support to the event marketing design, and free promotion through Visit Indy's communication channels. The support should target two types of events programming local artists, either multi-day music festivals based in Indianapolis that include domestic and inbound visitors as their target audience (the main priority), or showcases that promote Indianapolis music at industry events nationally and internationally.

Visit Indy should share best practice marketing guidelines on how to find the right type of visitor audience segments for the event and how to develop a marketing and promotional plan targeting them. To be eligible for Visit Indy's support, festivals should develop a marketing and promotional plan detailing their target audiences for locals and visitors, how they intend to engage visitors in particular, and how they would measure and report back on the number of visitors that engaged with the event. Visit Indy should also develop promotional guidelines for beneficiaries on how the event should feature and promote the Visit Indy / Indianapolis brand, in close relation to the implementation of Recommendation 19 (see below).

The support should be given to online and live streaming events while social distancing recommendations are still in place. Visit Indy should communicate the availability of these supporting resources to Indy's music festivals and venues through its website and dedicated informative sessions with the support of the Arts Council and the Indiana Independent Venue Alliance.

**Timeline:** Phase 1 (2020-2021) through Phase 3 (2022-2023)

## Best Practice Case Study - Music Export Memphis (Memphis, TN)<sup>133</sup>

**What Is It:** Based on the belief that music makes cities better, Music Export Memphis (MEM) attempts to not only attract new talent to live and work locally in Memphis, but then gives those local musicians opportunities to perform outside the city. This in turn drives tourism, economic development, and helps local artists grow their careers while also elevating the music city profile of the city.

They achieve this through offering ‘Experiences’ at events outside of Memphis that feature local talent and culture, for example their 2017 SXSW Memphis Picnic. They manage an ‘Export Bank’, which by taking advantage of national and global partnerships, they are able to offer unique and valuable opportunities for their artists.

MEM also provides financial support in the form of ‘Ambassador grants’. To qualify, the artist must have 5 or more tour dates, with 60% of them being held outside the state. They also offer a program of industry scholarships, which give grants to individuals in order to attend music industry conferences and professional development events outside of the local area. To qualify, an artist must be a resident of Memphis and also recording locally.

**Who Is Responsible?** Music Export Memphis, a nonprofit group founded in 2015.

**What Has It Done?** In 2019, Music Export Memphis paid out more than \$50,000 to musicians across all of their programs and artists supported by MEM were featured in popular music media outlets, such as NPR, Paste Magazine, American Songwriter and No Depression. They have built a strong network of local, national and international partnerships that not only improve local opportunities, but also opportunities abroad for enhanced music tourism and more vibrant music ecosystems.

**In Their Own Words:** “In Memphis, we’re lucky to have an incredibly rich musical heritage and a low cost of living, two things that attract artists to move here. We believe that opportunities – like those available through Music Export Memphis – are a key element to keeping them here. And when they stay, our city – everyone in our city, not just those in the music community – stands to benefit.”

**Relevance for Indianapolis:** Music Export Memphis is powered by an independent organization, instead of being a government-led effort, which allows for more flexibility with fundraising and industry outreach. A good starting point for Indianapolis are the ‘Experiences’ at U.S. industry events, a joint effort of local musicians, festivals, and corporate partners. This initiative can be used as inspiration to grow the marketing capacity and types of support offered as it gains traction over time.

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<sup>133</sup> Music Export Memphis (2020)

## Recommendation 19: Partner with Visit Indiana and Visit USA to increase the media coverage of Indianapolis as a music city

**Initiator:** Visit Indy

**Goals:**

- Develop strategic partnerships with key national stakeholders to maximize music tourism development
- Grow the media presence of Indy's music city brand among national and international audiences
- Increase the number of visitors who are motivated by the music and nightlife scene
- Increase the number of visitors who attend a concert in Indianapolis year-on-year
- Grow the sense of pride of the music scene among locals

**Context:** Interviewees mentioned many locals do not feel a sense of pride in their music scene, and local artists are only promoted once they have been legitimized by national media. This presents more opportunities to build strategic collaborations and cross-marketing campaigns with tourism drivers in Indianapolis, like sports organizations, and with national tourism agencies. Survey respondents also pointed out including more local music and live performances in the Indy 500 to break homegrown talent to locals and tourists, eventually to attract them to local venues after the race. A collaboration between Musical Family Tree, the Arts Council and Indiana Pacers coordinates local artist performances during the games, which could be extended to other sports. Indianapolis' marching bands and the Bands of America national championships are other powerful music assets that could be further tied to city marketing through strategic state and national partnerships.

**Specific implementation considerations:** Visit Indy should commit to inviting a contingent of journalists in mainstream and specialized media for music events each year as part of organized press trips. They should reach out to Visit Indiana and Visit USA to introduce this program as part of an existing promotional scheme to help amplify its reach. It should cover travel and accommodation costs for journalists and all activities in the visit program. Attending journalists should not be invited more than once every two years.

This media coverage program should reinforce the promotion of festivals and events that have, or have the potential to create, a wide appeal outside the region, including events benefiting from the support outlined in Recommendation 18, and music events integrated in

consolidated events including the Indy 500 and the NBA All-Stars Game. Interested event partners should be required to make their case through a publicly advertised application.

**Timeline:** Phase 2 (2021-2022) through Phase 3 (2022-2023)

### **Best Practice Case Study 1 - Brand U.S.A's "Hear the music" press trip<sup>134</sup>**

**What Is It:** Brand USA launched in 2018 the integrated marketing campaign "Hear the music, experience the USA" to promote international travel to the United States. The campaign focuses on promoting emerging artists from all over the country with different styles across Brand USA's platform, events and paid media, with currently 10 U.S. cities participating. The organization coordinated a press trip with a selection of high-profile music publications in the UK and Ireland who travelled independently to designated U.S. cities and were later assembled in Austin, Texas to share their experiences and impressions on the trip. The coverage resulted from the trips showcased the musical heritage of the cities visited.

**Who Is Responsible?** Brand USA, the public-private coalition spearheading the coordinated promotion of the United State as a premier travel destination.

**What Has It Done?** A 2019 return on investment (ROI) study conducted by Oxford Economics showed that since fiscal year 2013 Brand USA's efforts are directly responsible for increasing international visitation by an incremental 5.4 million travelers. Those visitors spent \$17.7 billion, which generated a total economic impact of \$38.4 billion.<sup>135</sup>

**In Their Own Words:** "The United States is and always has been a melting pot, and American music reflects the fusion of cultures, traditions, and ethnicities that travelers from around the world are invited to discover." Tom Garzilli, chief marketing officer, Brand USA<sup>136</sup>

**Relevance for Indianapolis:** Visit Indy and the Indy Music Strategy Committee should assess together the opportunity to join Visit USA's campaign as part of its new music marketing plan. A campaign of this scope and international reach will help put Indianapolis on the U.S. music map and simultaneously benchmark the city against other destinations.

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<sup>134</sup>Brand USA (2019)

<sup>135</sup> Taylor, M. (2019)

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## Best Practice Case Study 2 - Year of Chicago Music Marketing Toolkit (Chicago, IL)<sup>137</sup>

**What Is It:** Alongside the launch of the Year of Chicago series, which includes music-themed events and a \$3.5 million dollar investment, the local Department of Cultural and Special Events (DCASE), in a partnership with the local music industry, also developed a local awareness campaign, including digital billboards, advertising on CTA trains and busses, advertising at O’Hare National Airport, radio, community and minority-owned media and more.

To support the campaign, DCASE made a Music Marketing Toolkit, where everything is available online, including key schedule announcements, official hashtags and brand names, a manifesto and logos, in addition to sample social media posts, emails and press releases. Other related toolkits were also made available for the theater and performing arts sectors.

**Who Is Responsible?** Choose Chicago and marketing agency FCB

**What Has It Done?** This toolkit helps local organizations encourage and guide their audiences or partners in accurate and succinct advertising. With homogenous images and messages, and a simplified and officially approved set of messages, fans and supporting organizations can easily access necessary information and help successfully market upcoming events in a collaborative effort.

**Relevance for Indianapolis:** Any marketing initiatives and partnerships that Indianapolis develops in the future must attach a music marketing toolkit with clear guidelines on how to promote the Indy “music brand”, with examples of texts, posts, hashtags and images to align and maximize communication impact. Making it publicly available online, like Chicago did, also encourages fans and individual supporters who can take pride in the initiative, and further amplify the campaign’s reach.

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<sup>137</sup> City of Chicago (2020)

## Strategic Implementation Timeline

RECOMMENDATIONS	PHASE 1 (2020-2021)	PHASE 2 (2021-2022)	PHASE 3 (2022-2023)
<b>GOVERNANCE AND LEADERSHIP</b>			
1. Establish the Indy Music Strategy Committee	PHASE 1 (2020-2021)		
2. Develop a localized talent pipeline for Black and Brown artists and industry leaders	PHASE 1(2020-2021) - PHASE 3 (2022-2023)		
3. Enhance funding opportunities for the entire music sector		PHASE 2 (2021-2022) - PHASE 3(2022-2023)	
4. Amend regulatory frameworks to create an equitable music ecosystem	PHASE 1(2020-2021) - PHASE 2(2021-2022)		
5. Increase all-ages access and create a more inclusive music ecosystem	PHASE 1(2020-2021) - PHASE 2(2021-2022)		
6. Assess the implementation of an overlay zoning for music, arts and culture			PHASE 3 (2022-2023)
7. Devise music-centred incentivization programs		PHASE 2 (2021-2022) - PHASE 3(2022-2023)	
<b>MUSIC EDUCATION</b>			
8. Create music education opportunities and improved access through stakeholder collaboration	PHASE 1(2020-2021) - PHASE 3 (2022-2023)		
9. Establish “music career days”		PHASE 2 (2021-2022)	
<b>ARTIST &amp; INDUSTRY DEVELOPMENT</b>			
10. Expand artist development services and industry training	PHASE 1(2020-2021) - PHASE 3 (2022-2023)		
11. Activate a “Fair Pay” compensation scheme for artists		PHASE 2 (2021-2022)	
(continues on next page)			

RECOMMENDATIONS	PHASE 1 (2020-2021)	PHASE 2 (2021-2022)	PHASE 3 (2022-2023)
SPACES AND PLACES			
12. Implement a program designed to utilize non-traditional music spaces			PHASE 3 (2022-2023)
13. Designate a single entity responsible for consolidating all music industry promotions, showcases, and resources online		PHASE 2 (2021-2022) - PHASE 3 (2022-2023)	
AUDIENCE DEVELOPMENT			
14: Support the broadcast of contemporary local music on public radio	PHASE 1(2020-2021) - PHASE 2 (2021-2022)		
TOURISM AND REPUTATION AS A "MUSIC PLACE"			
15: Memorialize Indianapolis' historically significant sites and musicians in jazz, blues and other genres	PHASE 1(2020-2021) - PHASE 2 (2021-2022)		
16: Develop a documentary exploring the relationship of local musicians and organizations with the city			PHASE 3 (2022-2023)
17: Introduce a paid busking scheme in tourist hotspot areas		PHASE 2 (2021-2022)	
18: Support the promotion of multi-day signature events and venues showcasing local talent	PHASE 1(2020-2021) - PHASE 3 (2022-2023)		
19: Partner with Visit Indiana and Visit USA to increase the media coverage of Indianapolis as a music city		PHASE 2 (2021-2022) - PHASE 3 (2022-2023)	

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