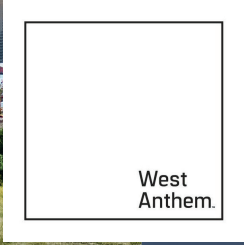


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WEST ANTHEM MUSIC ECOSYSTEM STUDY

Alberta, Canada

Final Report | October 2020



West Anthem Music Ecosystem Study

Final Report October 2020

West Anthem Steering Committee

Disclaimer: This research project was launched in 2019, with most of the research being completed by March 2020. The last amendments were completed prior to the COVID-19 pandemic. Additional COVID-19 resources and references have been offered to the West Anthem Committee on an external document.

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1. Introduction

FOREWORD FROM WEST ANTHEM

If ever there was a time to harness the creative capital of the music industry in our province, it would be now. Alberta's music legacy is impressive. Decade after decade, Alberta has contributed not only talent to the national and international stage, but it has also developed an ecosystem of venues, festivals, studios, labels and professionals that are recognized for their quality and leadership across Canada and around the world. Tommy Banks, k.d. lang, Ian Tyson, Jann Arden, Paul Brandt, Feist, Tegan & Sara, and Holger Petersen are just a few examples of recognized national and international talent who have come from Alberta. Yet, despite this talent and recognition, our music industry infrastructure in the province is relatively underdeveloped and has yet to be viewed as an investment priority within the cultural industry sector. As a result, our artists, technicians, and related professionals often need to leave our province in order to make a living, despite the growing demand for music and its associated industries.

Recognizing the untapped cultural and economic benefits of the music industry in our province, West Anthem evolved out of the Alberta Music Cities Initiative and the report, Fertile Ground, which was commissioned, funded, and published by the National Music Centre and the Scotlyn Foundation in 2014 and authored by Music Canada. The purpose of the report was to instigate a conversation about fostering the development of music cities in Alberta and to highlight how music could be a catalyst for economic growth in Calgary, Edmonton and, ultimately, across the province. From this report came a number of recommendations to help further the case for music cities in our province; one of the recommendations being the development of this study.

When West Anthem began laying the foundation for a music ecosystem study, we never could have predicted what our world would look like today. COVID-19 sent shock-waves through Alberta's music ecosystem. The cancellation of music festivals, temporary and permanent closures of music venues, and the loss of many musicians' main sources of income, are just a few examples of the many dire effects of the pandemic on our industry. As we adjust to our ever changing new realities due to the COVID-19 pandemic, the importance music plays in uniting communities, contributing to mental wellness, and providing nourishment for creativity cannot be denied.

To quote Maya Angelou, "you can't really know where you are going until you know where you have been." This study provides a snapshot of the Edmonton and Calgary music industry pre-pandemic and provides insight into the immense opportunity music provides for the long-term resiliency and vibrancy of our province. As we press on during and post-pandemic, it is our hope that this document will be a road map for where our province is headed as we build a more connected, diverse, resilient and prosperous Alberta than ever before. On behalf of the West Anthem steering committee and our stakeholders, we are very excited to be releasing the following music ecosystem study for the advancement of our industry and our province. This can be achieved by leveraging smart policies or strategies, similar to those outlined in the report, to create music-friendly cities. West Anthem would like to thank all of our community partners, sponsors and supporters for making this work possible.

Sincerely,
West Anthem

ABOUT THE PROJECT

The music sector in Calgary and Edmonton is extensive, making significant contributions to the social and economic fabric of the two cities, their metro regions and the province as a whole.

The dedication to music is evident throughout the two regions, with their extensive funding and advocacy opportunities for music creators, quality educational offerings and music facilities via universities, such as the music program at MacEwan University, the National Music Centre and the Winspear Centre. In these areas, there are over 1,500 music assets, and a rich variety of music festivals catering to all genres. Through the diversity, support systems and assets that already thrive in Calgary and Edmonton, this report aims to harness the power of the music community, activating music-friendly policies and fully integrating the music ecosystem into the planning, development, and progression of Alberta.

Once Calgary and Edmonton music communities are activated, they will contribute to Alberta's vibrancy in a variety of ways, including creating jobs, developing skills and fostering a wider pool of lucrative intellectual property beyond the two cities' metro regions. However, supporting the music sector requires a comprehensive understanding of its value in the province, alongside persistent monitoring. Drawing from extensive research and data analysis, stakeholder feedback and global best practices, the West Anthem Music Ecosystem Study provides a strategic plan to engage provincial and municipal policymakers, industry stakeholders, and audiences in both Calgary and Edmonton. The objective is to grow and support the region to position the province as a music hub.

THE METHODOLOGY

Research for the West Anthem Music Ecosystem Study was conducted between September 2019 and February 2020.

The project's aim is to assess, benchmark and measure the overall music ecosystem in Greater Calgary and Edmonton. The music ecosystem, in this case, refers to:

- The music industry (recorded, live, production, creation, marketing, spaces/venues);
- Regulations and policies related to music (funding, tourism, education, licensing) on the provincial and municipal level;
- Music export strategies;
- Night-time economy.

The process is outlined below.

Step 1 - Music Vision and Regulatory Assessment: A long-term vision for Alberta’s music ecosystem was established. This was followed by desk research, literature reviews and an overview of all relevant policies and strategies. We also compared the findings to best practices from all over the world from which Edmonton and Calgary can learn.

Step 2 - Stakeholder Engagement: Over 3,040 respondents participated in two online surveys between November 2019 and January 2020. Of the participants, 340 respondents were musicians, 2,564 were music fans, and 200 were music industry professionals. We also conducted 12 round-tables and 15 on-line and in-person interviews, with over 120 music industry stakeholders engaged throughout the process.

Step 3 - Quantitative Research: A music asset map was created through our unique place-scraping tool and was supported through local consultants. We combined our comprehensive mapping findings with data from additional sources, such as the Canada Culture Satellite Account, to deliver an economic impact assessment of Alberta’s music ecosystem.

Step 4 - Analysis of Key Findings and Strategic Opportunities: We provided an extensive analysis of our music-based economic findings, alongside an overview of the key strengths and challenges in the province. This was supported by a benchmarking analysis in nine strategic opportunity areas. Each area features key actions and case studies to refer to, going forward.

2. Key Findings

The findings below are further analyzed in each of the nine provided action areas. This summary is compiled from our surveys, interviews and roundtable sessions, as well as the findings from the ecosystem mapping.

<p>\$2.01b total GDP of Alberta’s music ecosystem:</p> <ul style="list-style-type: none"> • \$820.76 m in Calgary • \$687.53 m in Edmonton 	<p>21,260 jobs supported by the Alberta music ecosystem:</p> <ul style="list-style-type: none"> • 8,435 in Calgary • 7,107 in Edmonton
<p>25% - growth of the Alberta music ecosystem between 2010 and 2017.</p>	<p>1.0% of Calgary’s and 0.9% of Edmonton’s total workforce work in music.</p>
<p>Calgary’s music economy is leading in live music, while Edmonton is stronger in the recording domain.</p>	<p>74% of musicians state they lack professional support services (managers, booking agents, record labels, etc.).</p>

<p>110 music festivals in Alberta:</p> <ul style="list-style-type: none"> • 43 in greater Edmonton • 35 in greater Calgary 	<p>Over 590 venues showcasing music across the two metro regions.</p>
<p>81% of artists have had income from music in the past year:</p> <ul style="list-style-type: none"> • 73% from performance and touring • 26% from recorded music sales • 10% from composing and sync 	<p>\$23,000 average yearly music income for surveyed artists (live, recorded).</p>
<p>\$600 - Median yearly spend by fans on music.</p>	<p>39% of the surveyed music fans in Calgary and 45% of fans in Edmonton attend live music shows at least once a month.</p>

SWOT ANALYSIS

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> → Newly developed Rogers Place arena in Edmonton, alongside plans to develop a new Calgary Event Centre → Ownership of the National Music Centre → Unique educational opportunities found in MacEwan University, Mount Royal Conservatory and the Banff Centre for Arts and Creativity → Rich festival offerings throughout the province (ie; “The Greatest Outdoor Show On Earth”, the Calgary Stampede) → Exemplary health and safety practices for live music and entertainment venues → Promotion of artist development led by the publishing of Calgary’s Busking Guidelines → CKUA Radio Network – a unique resource for promoting Alberta artists with an established presence in Alberta. 	<ul style="list-style-type: none"> → No policies protecting music venues (e.g. Agent of Change) currently in place → No government level music commissions or representations to accommodate partnerships amongst policy-creators and music communities → Missing all-ages ordinances used to establish a strong music economy and inclusive music communities → No fair pay schemes for performing artists → No current incentive programs that support music-centred activity → Lacking night time transportation, which limits access to late-night events, and transportation to and from jobs that support night-time activity.

OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> → Work to develop a stronger music identity to diversify opportunities and encompass First Nations, Metis and Inuit heritage → Make use of dormant spaces by redeveloping them to create music hubs → A rich and diverse music heritage founded upon the musical roots of the province → Structure music assets as a driver for tourism in the province (ex; Calgary Stampede and Edmonton’s ICE District) → Showcasing opportunities for local artists on a regional and international level and fostering the growth of homegrown talent → Inspect and enhance music access for all music actors, including culturally diverse artists, women, people of colour and LGBTQ2+ Communities 	<ul style="list-style-type: none"> → Geographical dispersion of the major cities in Alberta can negatively impact music tourism → Talent drain to other well-supported music ecosystems in other cities or the surrounding provinces and states → An overzealous focus on traditional music genres in the province (folk) which can lead to a neglect of other rising genres that appeal to youth (EDM and Hip-Hop) → Undetermined increases in national regulations for home-buyers, leading to a decrease in the number of young-adults purchasing homes in the core of major cities → In Canada, Calgary, more than Edmonton, is not commonly perceived as a creative city.

“I want everyone to know that music is an important industry in Alberta, and that the government needs to take notice of this. Music truly brings people of all types together.”

Survey Respondent

3. Economic Impact Summary

34% of music industry businesses have seen at least some increase (<25%) in their revenue over the past financial year, while 49% expect to see an increase of at least 25% over the next 5 years.

Music Ecosystem Survey Finding

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

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

Music ecosystem domains included in the economic impact analysis are outlined below.

- **Live Music Performance** (based on the Canadian Culture Satellite Account Live Performance domain) - includes “opera, dance companies and dancers, musical theatre, orchestras, music groups and artists, music festivals”¹ and nightclubs and venues.²
- **Sound Recording** (based on the Canadian Culture Satellite Account Sound Recording domain)³ - includes all activities related to the creation of recorded music, including music composition, music publishing and distribution, and digital music downloads and uploads.
- **Supporting and Radio Broadcasting**⁴ - created to include activities not part of the previous two. It groups radio broadcasting, music education, and public funding (music grants), together with sound recording equipment and music instrument stores.

The geographic scope of this assessment is limited to metropolitan areas within the province of Alberta:

- Edmonton Metropolitan Region⁵
- Calgary Metropolitan Region⁶

Additionally, to enrich the comparative analysis, the rest of the province was taken into account within the assessment as a regional unit.

GLOBAL ECONOMIC CONTEXT

- In 2019 the global recorded music market grew by 11.4% to reach \$21.5 billion, an increase of \$2.2 billion in 2018.⁷

¹ Statistics Canadian Conceptual Framework for Culture Statistics, 2011, P. 41. For the purposes of this research, this domain excludes the performing arts activities that are not related to the music sector.

² This subdomain is not included in the methodology of the Culture Satellite Account of Canada, it groups venues and nightclubs whose main input is music, either recorded or live.

³ Statistics Canadian Conceptual Framework for Culture Statistics, 2011, P. 42

⁴ This domain includes activities of “Governance, Funding and Professional Support” and Audiovisual and Interactive media’ domains defined in the methodology of the Culture Satellite Account.

⁵ Population of the area: 1,321,426. Source StatCan (2019)

⁶ Population of the area: 1,392,609 Source StatCan (2019)

⁷ Midia Research (2020)

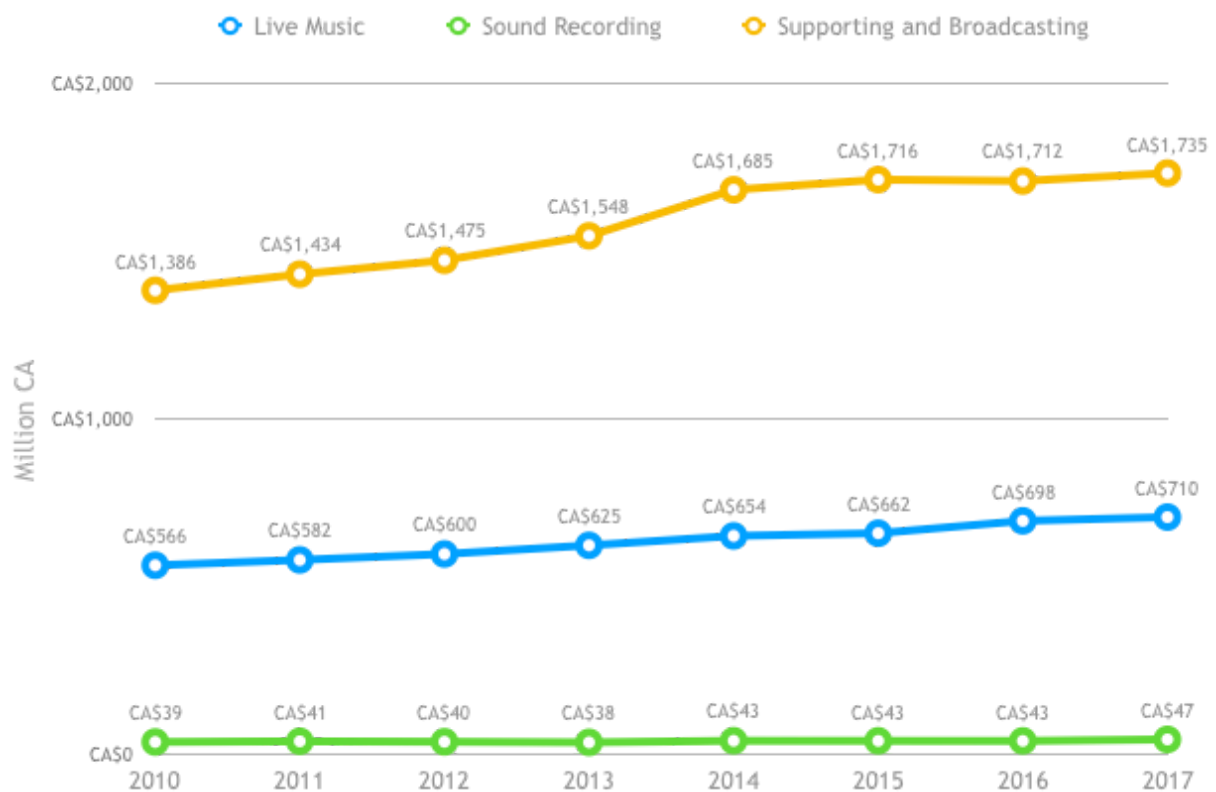
- Music streaming totals 56% of all global revenue, while the artists' share amounts to 4.1%.⁸
- In 2018, Canada was the ninth biggest recorded music market, valued at \$572 million.⁹

ECONOMIC IMPACT OF MUSIC IN ALBERTA

In 2017, Alberta's music sector generated a total output (direct, indirect and induced effect) of \$4.18 billion and a total Gross Domestic Product (GDP) of \$2.10 billion. Music created and supported a total of 21,260 jobs. Those music employees received a total compensation of \$1.29 million in the year. The contribution of the music ecosystem to Alberta's employment was 0.93% of the total employment in the province.

ALBERTA'S MUSIC ECOSYSTEM' DIRECT ECONOMIC IMPACT¹⁰

Figure 1. Alberta's Music Ecosystem Direct Output by Segment 2010-2017¹¹



⁸ ibid.

⁹ IFPI (2019)

The IFPI Global Music Report 2020 (containing 2019 market data) is expected to be published in late March 2020. We will update these figures accordingly.

¹⁰ For a detailed economic impact assessment, including direct, indirect and induced figures, calculations and methodology, please refer to the appendix A of the Economic Impact Summary

¹¹ The calculations for the 2010 - 2017 series are based on official data from the Cultural Satellite Account (2010 - 2017), the Food Services and Drinking Places Statistics (2010 - 2017) and Statistics Business Counts 2010 - 2017 for the province level, from which the Output trend through the years of the domains make up the music ecosystem in Alberta.

Table 1. Alberta's Music Ecosystem Direct Impact, by Domain, 2017

MUSIC SECTOR	ECONOMIC GROWTH OR DECLINE BETWEEN 2010 AND 2017	PERCENTAGE AND VALUE OF MUSIC ECOSYSTEM in 2017	JOBS
LIVE MUSIC	25.4%	29%; \$709 million	5,440
MUSIC SUPPORT & BROADCASTING	25.2%	69%; \$1.73 billion	6,426
SOUND RECORDING	19.8%	2%; \$47 million	478

In addition, we also calculated the proportion of music within the contribution generated by Alberta's cultural sector.¹² In 2017 the music sector contributed 16.6% of the employment generated by the cultural industries in Alberta. It also contributed 16.9% of the GDP and 18% of the output of the cultural industries during the same year. It is evident that the significant contributions from Alberta's music ecosystem are exemplary, even without tax incentives that resemble those of other creative industries, such as the film and television industry. The film incentives include \$15 million in total funding placed into a tax credit program in 2020.¹³ A comparison of the different cultural industry subsectors can be found in Figure 3. The statistics and outputs of Alberta's music ecosystem are evidently quite strong. It remains to be seen what additional value music can add to the overall economic outputs of the province once supportive structures, such as incentives, are put into place.

¹² According to the Canadian Framework for Cultural Statistics and the Culture Satellite Account, the Culture Sector groups 7 domains: heritage & libraries (archives, libraries, cultural heritage, natural heritage); live performance (performing arts, festivals & celebrations); visual and applied arts (original visual arts, art reproductions, photography, crafts); written and publishing works (books, periodicals, newspapers, other published works); audiovisual & interactive media (film and video, broadcasting, interactive media); sound recording (recording and publishing industries); and ancillary culture domain (advertising, architecture, design). As previously explained, the music ecosystem is not only made up of the sound recording domain, it also has to do with some portions of the live performance (with all the live music and festival activities) and audiovisual & interactive media (with the radio broadcasting activities) domains where activities related to live music and radio broadcasting are grouped. Furthermore, to calculate the participation of the music sector as a proportion of the cultural sector in Alberta, and for the sake of comparability of data, hereby it is necessary to exclude the subdomains of music venues and nightclubs, as well as sound recording equipment stores previously included in the calculations for this economic impact assessment, since they are not included in the official CSA domains.

¹³ Blake Lough (2020)

Figure 2. Alberta Jobs, GDP and Output Ratio, Music Sector and Rest of Culture Sector, 2017

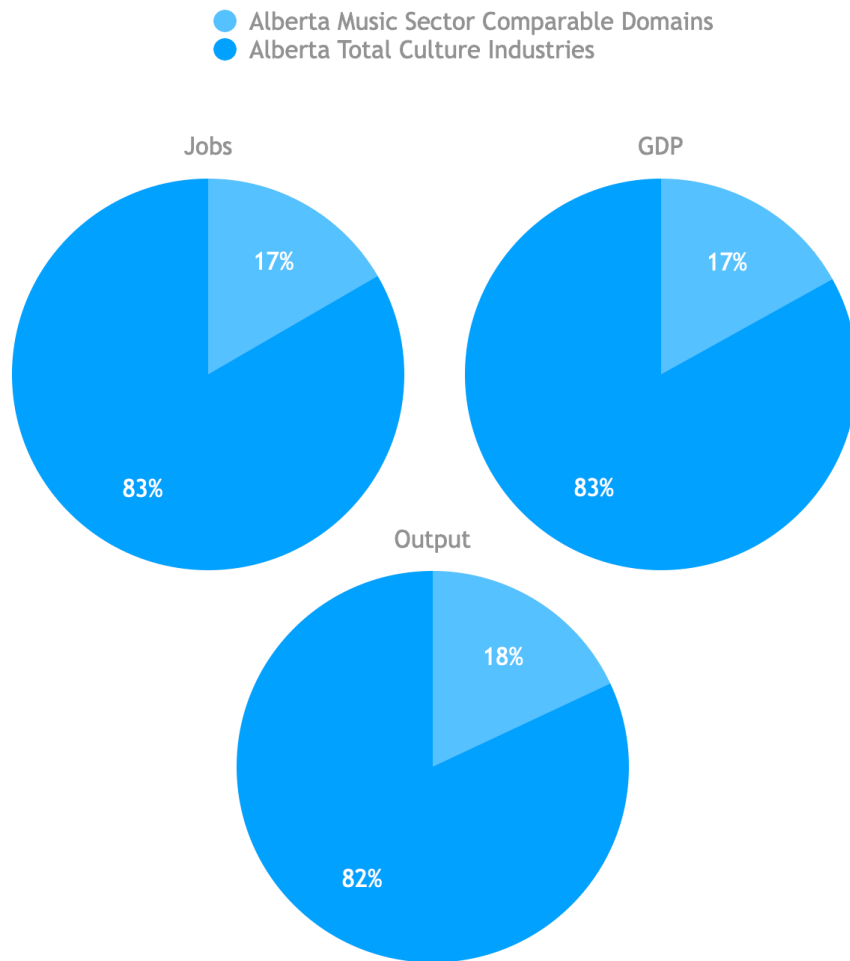
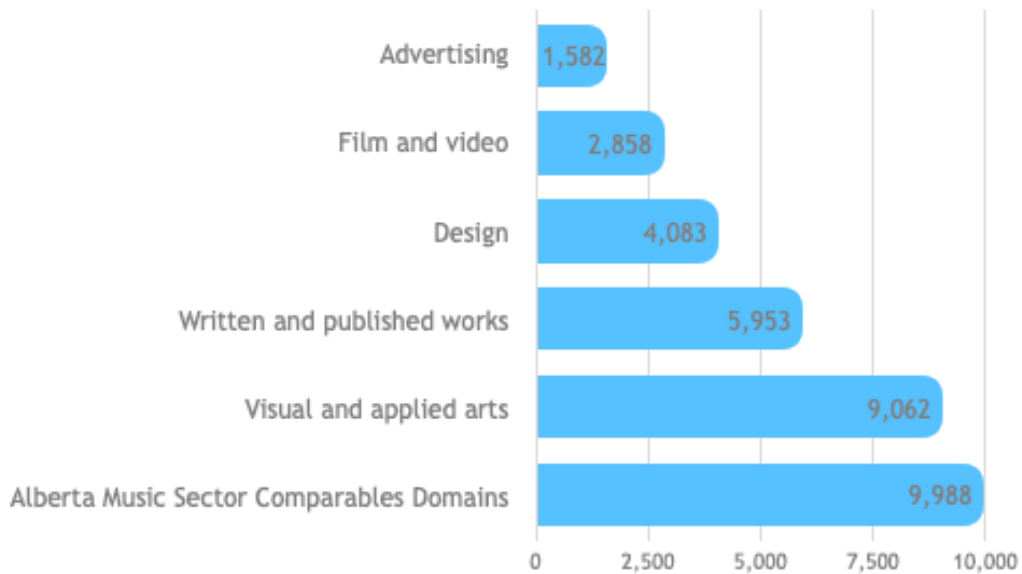


Figure 3. Alberta Culture Sector Jobs, Employment Comparison, 2017

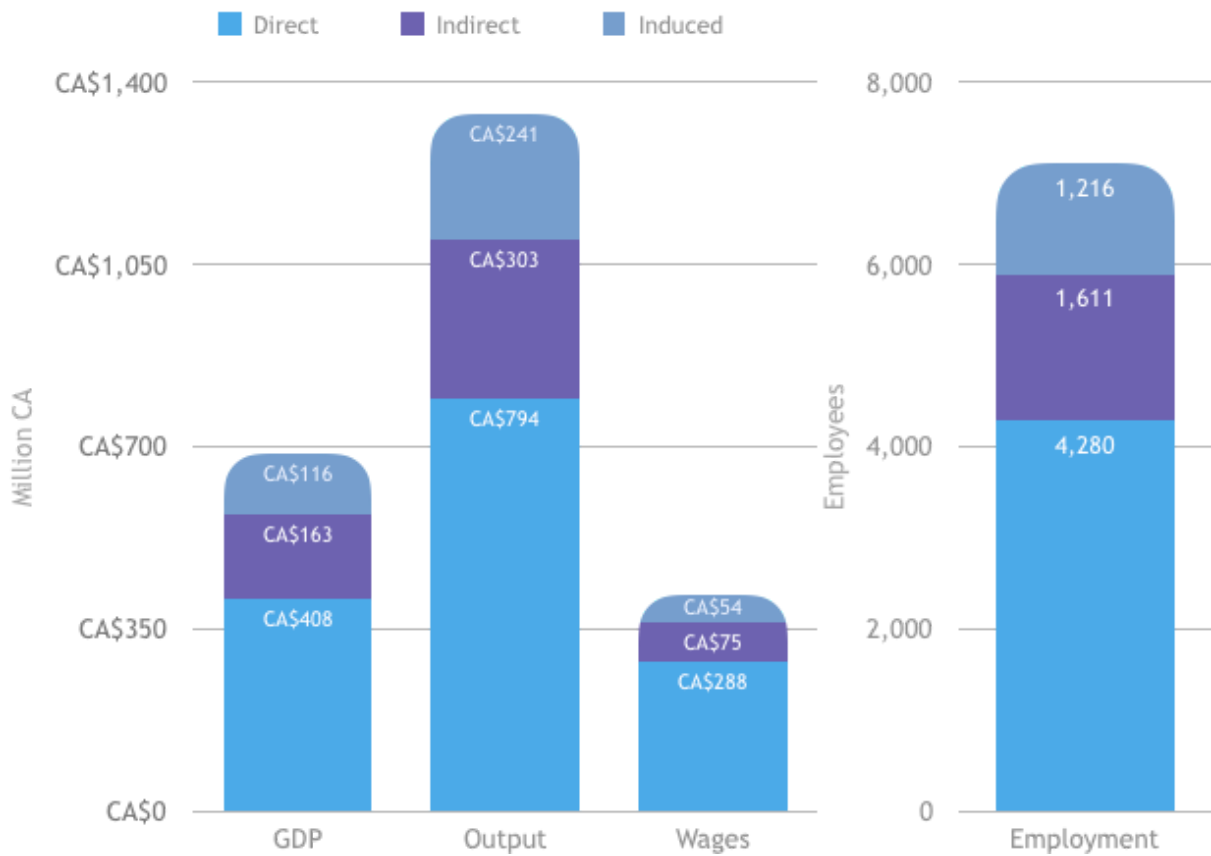


Sources: Statistics Canada, Culture Satellite Account 2017, Sound Diplomacy Research

EDMONTON AND CALGARY'S SPECIFIC ECONOMIC IMPACT

In total, the two cities' music ecosystems generated an output of \$2.9 billion - \$1.3 billion and \$1.6 billion in Edmonton and Calgary, respectively, and a GDP of \$687.53 million and \$820.76 million to their regional economies in 2017. The total number of jobs generated and supported by the music sector reached 7,107 in Edmonton and 8,435 in Calgary, which accounted for 0.92% and 1.01% of the employment within each metro region.

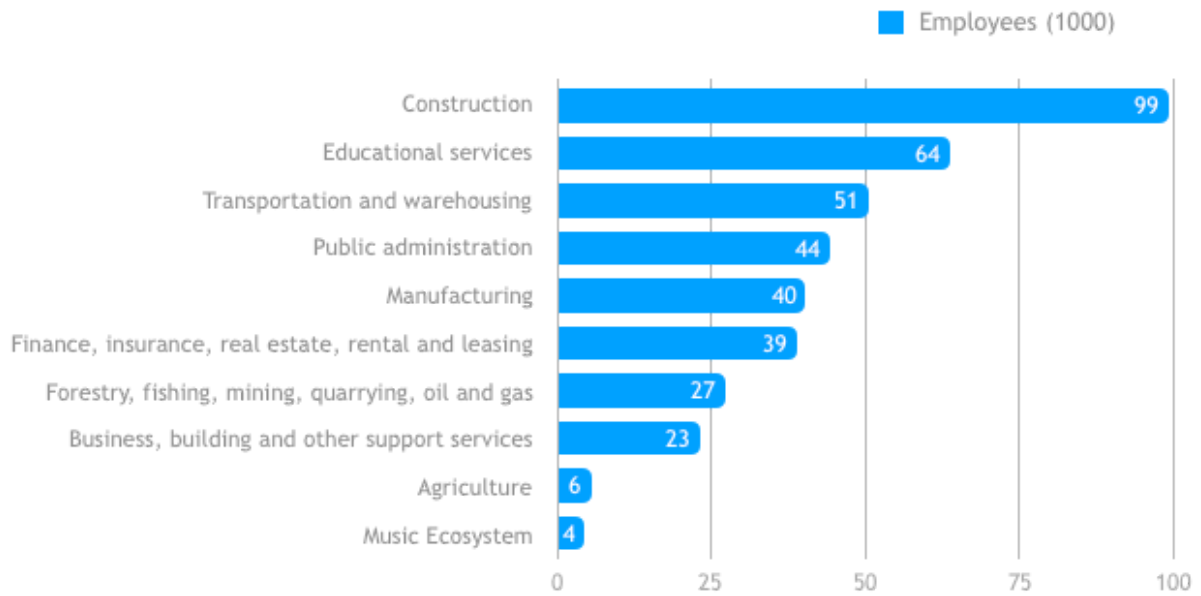
Figure 4. Edmonton's Music Ecosystem Total Economic Impact



Edmonton's music ecosystem produced a direct output of \$793.66 million and an estimated GDP of \$408.15 million. It was responsible for 4,280 direct jobs, while the compensation (wages) of these employees reached \$416.07 million. The direct employment of the music ecosystem represents 0.55% of the total employment within the Edmonton Metropolitan Region.

To put this into perspective, the direct employment generated by the music ecosystem in Edmonton (4,280) was relatively similar to the one generated by agriculture (5,500). Furthermore, the figure represents approximately 10% of the employment generated by the public administration and 4% of the construction industry. The comparisons made between other industries, such as finance, construction and agriculture are offered to signify what is possible when an industry is completely ingrained into local policies. They also demonstrate that Alberta still maintains a strong music-centred output.

Figure 5. Edmonton, Music Ecosystem Employment by Industry, 2017



Calgary’s music ecosystem produced a direct output of \$931.02 million and an estimated GDP of \$479.56 million. It was responsible for 5,125 direct jobs (or 0.62% of the local employment), and the compensation (wages) of these employees reached \$495.50 million.

The direct employment generated by the music ecosystem in Calgary (5,125) represented approximately half (47%) of that generated by agriculture (10,900), approximately 16% of the employment generated by the public administration (32,400) and 6% of the construction industry direct employment (85,500). Given the output of the music ecosystem, the wages and number of employees found in Alberta indicate that Alberta has a music ecosystem that is much stronger than it appears, given the compensation provided (Figure.6).

Figure 6. Calgary's Music Ecosystem Total Economic Impact

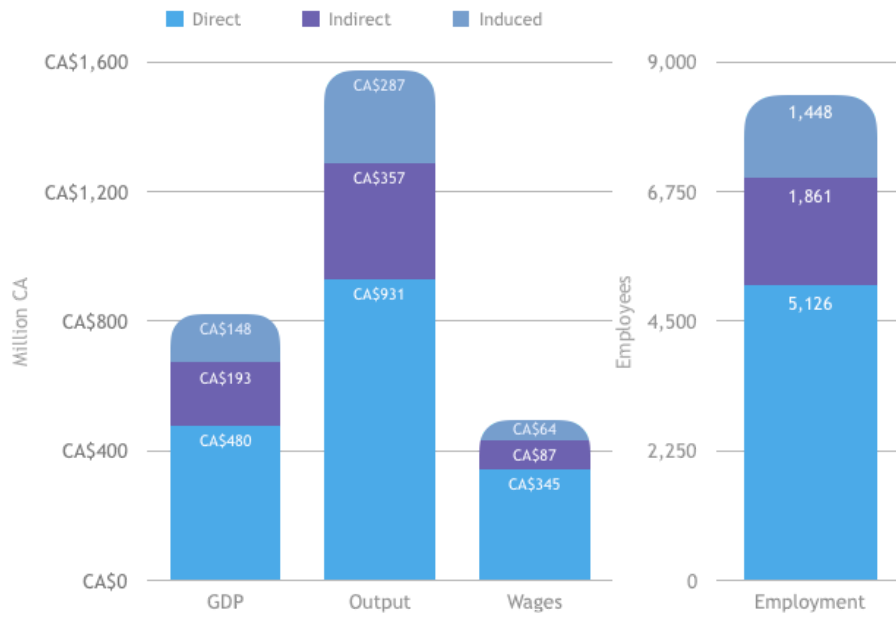


Figure 7. Edmonton's Music Ecosystem Direct Employment and Output by Domains



Figure 8. Calgary's Music Ecosystem Direct Employment and Output by Domains



Looking at the provincial landscape, Calgary produced 37% of Alberta's music ecosystem GDP, while Edmonton and the rest of the province accounted for 32% and 31%, respectively.

Why Does This Matter?

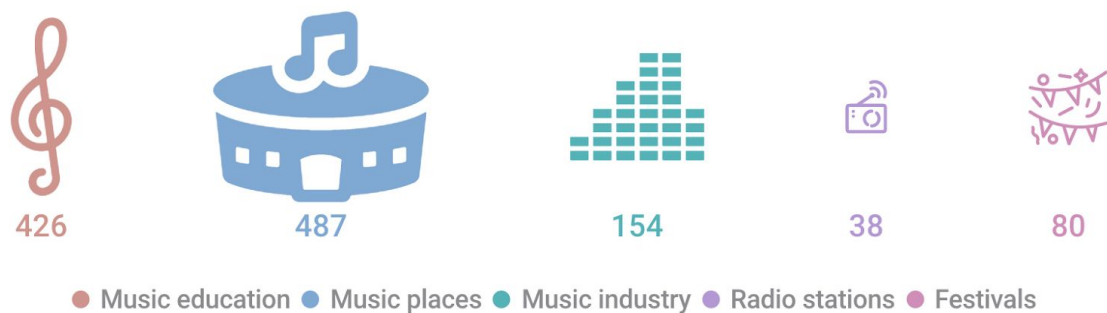
The province of Alberta has a very strong music ecosystem, despite not experiencing the same benefits and support systems offered to other cultural and traditional industries. British Columbia and Nova Scotia, for example, have experienced success in their music-centred outputs, credited mainly to policies and support offered by their respective governments and local organizations. For comparison, it was estimated that British Columbia's music sector generated a total output of \$4.51 billion and a total GDP of \$2.37 billion in 2017. Both Nova Scotia and British Columbia experience tremendous support and work to sustain music advisory infrastructures. Alberta has maintained success with a direct output of \$931.02 million and an estimated GDP of \$479.56 million, even without similar support. It is clear that Alberta has an opportunity to become a music leader in Canada once strategies, incentives, and programming are made available.

4. Music Asset Mapping

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

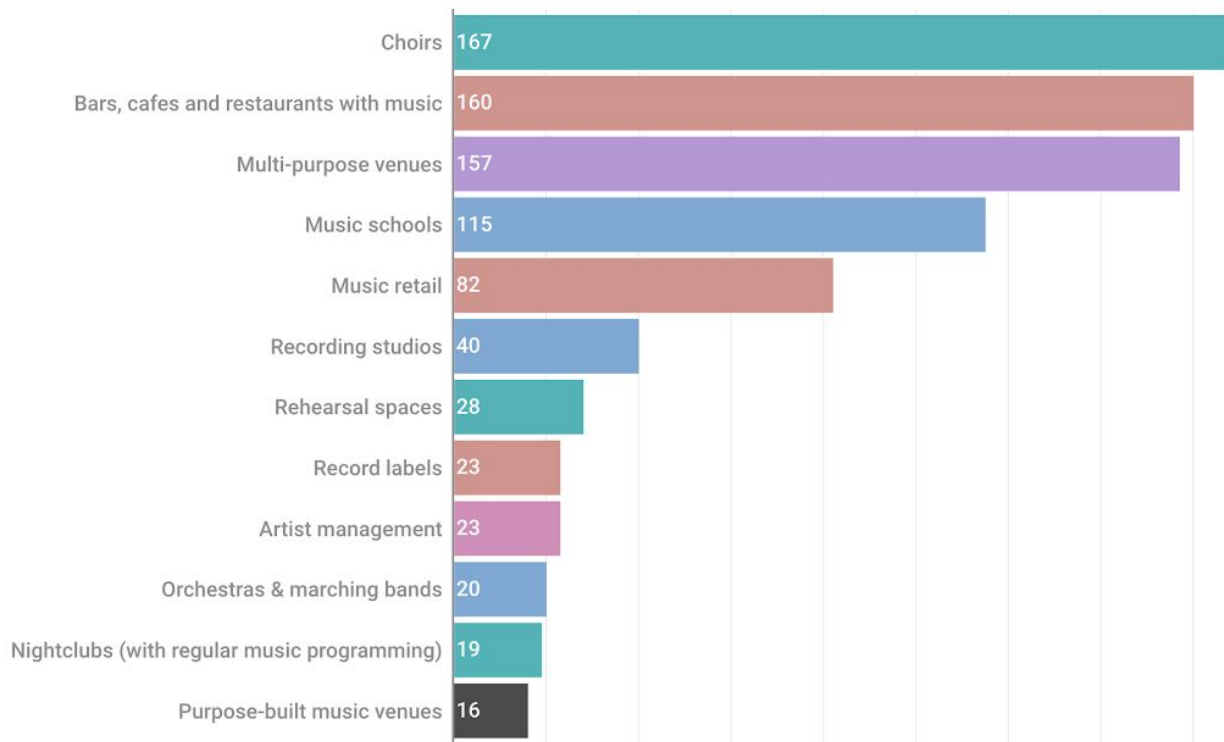
- Our proprietary mapping software utilized publicly available API data from Google, Songkick, Stats Canada and other sources to scan the overarching music ecosystem across Alberta;
- This was cross-referenced through the industry survey, roundtables and 1-on-1 interviews to further identify spaces, places and companies across Alberta, with a focus on Greater Calgary and Edmonton;
- The data was cross-referenced and verified by local consultants, musicians, producers and businesses. This included support from Valeeshia Young, Kaley Beisiegel, Troy Kokol, Trey Mills, Alberta Music Industry Association, and others;
- The assets comprise registered, taxable businesses, foundations and community organizations, as well as home recording studios;
- The mapping is intended to provide a living snapshot of Calgary and Edmonton’s music ecosystem. It will require regular updating to remain current.

Figure 9. Infographic and overview of selected music assets in Calgary and Edmonton¹⁴



¹⁴ The music assets are defined in detail in the Music Asset Sheet addendum to this report.

Figure 10. Infographic and overview of all music assets in Calgary and Edmonton¹⁵



An overall culture of music appreciation is visible in the variety of music places mapped, with music being integrated into many communities both formally and informally. Calgary and Edmonton are home to numerous professional and community choirs, bands and orchestras. Our mapping indicates a total of 167 choirs, and 20 bands and orchestras, including 5 marching bands, spread across the two metropolitan regions. The vast number of music education assets mapped - music schools (115), private instructors (300), conservatories and tertiary music education programs (11) - and their distribution across the two metro regions is a healthy indicator of the value that parents and adults give to formal music education, which in turn creates employment opportunities for local graduates and artists.

We listed over 480 spaces across Greater Calgary and Edmonton where live music is performed. However, only 23 (Edmonton) and 24 (Calgary) of them are located outside the two city borders. Furthermore, music is an accessory to most of these spaces – bars, cafés and restaurants with music, multi-purpose and occasional venues,¹⁶ etc.. Dedicated, purpose-built music venues where live music is programmed on a regular basis, on the other hand, are scarce. We identified 16 of them, and almost two-thirds of them are located in the City of Edmonton.

Calgary and Edmonton have a diversity of festivals with live music - we listed a total of 71, 36 of them within the City of Calgary, 35 in the City of Edmonton. 6 of these festivals are within

¹⁵ The music assets are defined in detail in the Music Asset Sheet addendum to this report.

¹⁶ Note that spaces such as faith-based establishments and community centres are included under Occasional venues and that all the definitions are available in the West Anthem Music Asset Sheet

the Edmonton Metro Region, while there are 6 in the Greater Calgary Region. Aside from live music assets, the two regions are home to a competitive number of recording studios. A total of 50 recording studios were mapped. They are, with a few notable exceptions, clustered within the city limits of Calgary (16) and Edmonton (29). In addition, we mapped 17 rehearsal spaces in Calgary and 11 in Edmonton, as well as 11 art and music coworking hubs in Calgary and 18 in Edmonton. The availability of affordable rehearsal and workspaces was highlighted as one of the lowest scoring components of the music ecosystem in both Calgary (avg. score 2.6) and Edmonton (avg. score 2.4) by the music industry survey respondents.

While our mapping identified a good number of music industry businesses - 23 artist managers, 23 music and audio production businesses, 23 record labels, 16 booking and promotion agencies, and 6 presenting organizations - their numbers are not enough to serve the talent market. During both the roundtable and survey engagement phases, artists and industry stakeholders indicated shortages in terms of support teams for local musicians. Using existing mapping data from other North American cities, we developed a per capita comparison for the greater Edmonton and Calgary regions, alongside the Vancouver Metro area and the City of San Francisco. Our results show that Greater Edmonton has a larger music ecosystem in terms of the music asset number, yet Calgary's generates a larger economic impact (see Section 3. Economic Impact Summary). Furthermore, while the world-renowned San Francisco music economy is leading in terms of festivals, media and music industry assets, both Calgary and Edmonton are ahead of the Vancouver Metro Area and San Francisco in their per capita music education and venue offers, despite having a significantly smaller population.

Table 2. Number of assets per capita in Greater Calgary and Edmonton (100,000 pc) and comparison cities/areas¹⁷

ASSET	Asset pC Greater Calgary ¹⁸	Asset pC Greater Edmonton ¹⁹	Asset pC Vancouver Metro Area ²⁰	Asset pC City of San Francisco ²¹
Music Education Assets ²²	21.5	23.4	12.8	16.2
Music Venues	15.4	20.6	6.4	10.9
Music Festivals	2.6	3.3	1.7	5.5
Recording Studios	1.2	2.5	2.1	5.0
Record Labels	0.5	1.2	0.6	1.1
Radio Stations	1.3	1.5	1.2	3.0

¹⁷ Unless stated otherwise, the data source is Sound Diplomacy's own mapping research and data scraping tool.

¹⁸ Population: 1,392,609

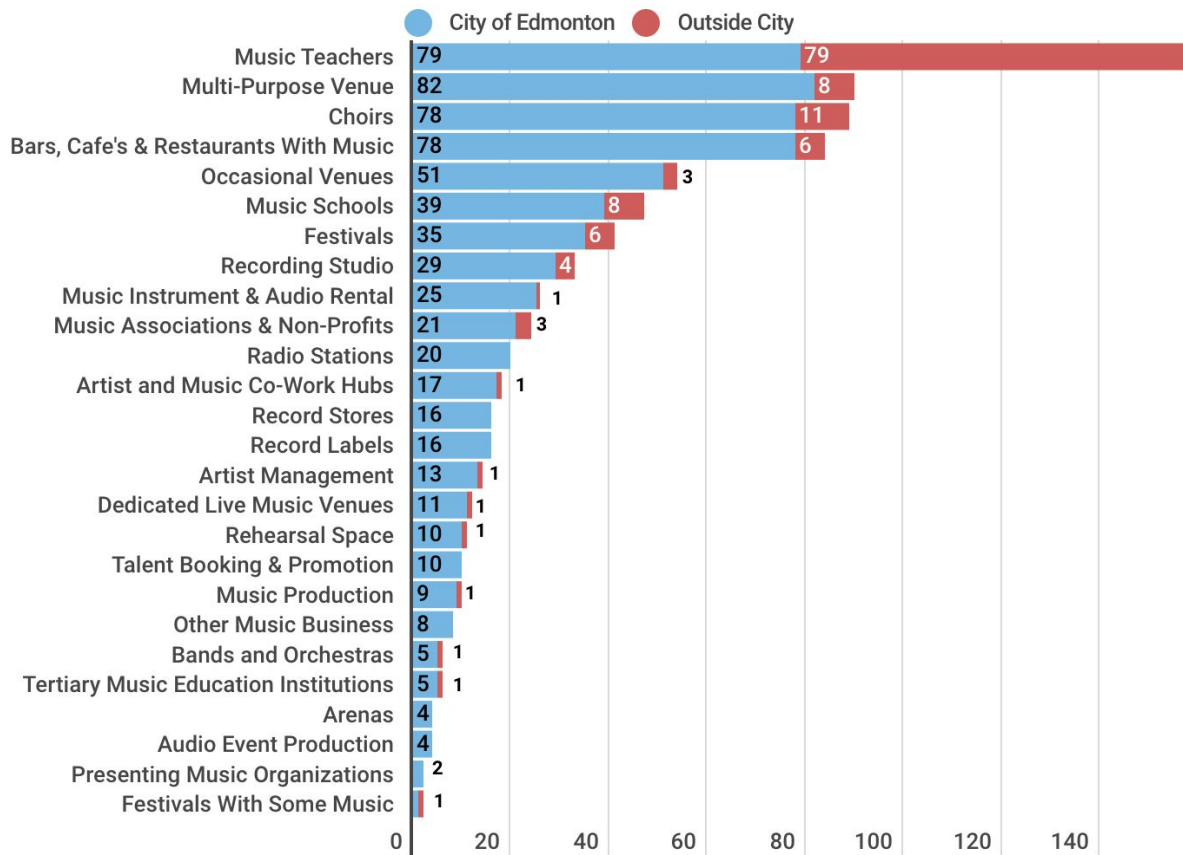
¹⁹ Population: 1,321,426

²⁰ Population: 2,463,431

²¹ Population: 884,363

²² The sum of all music teachers, schools, conservatory, college and university programs with music, including music business programs, choirs and orchestras.

Figure 11. Overview of music assets in City of Edmonton and Greater Edmonton



A heat map view of all music assets in Edmonton shows a clear concentration of music uses in the core of the City of Edmonton, with small clusters of activities in Leduc, Sherwood Park, St. Albert, Spruce Grove and Stony Plain.

Figure 12. Distribution of music spaces and places in Greater Edmonton – map view with legend

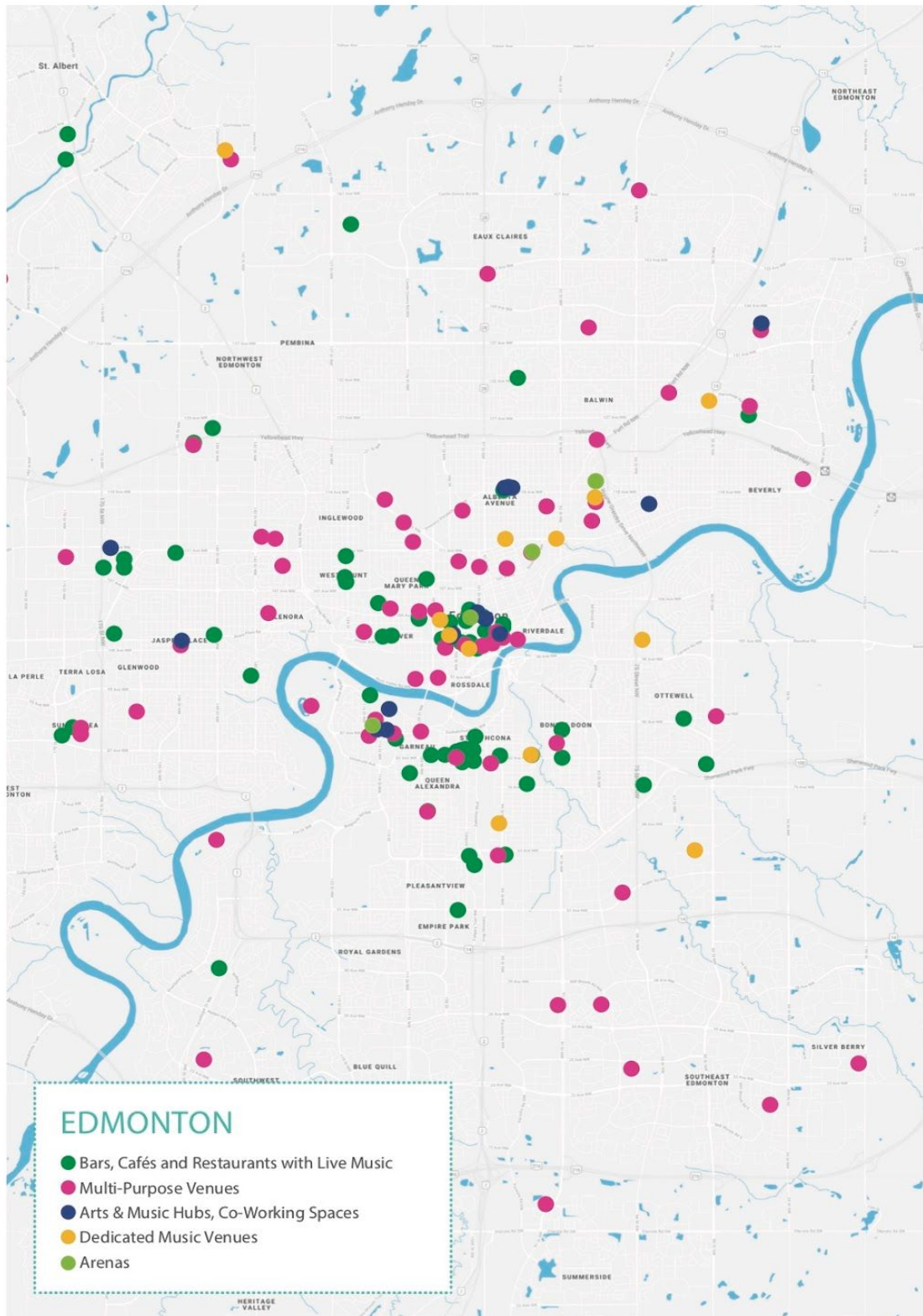
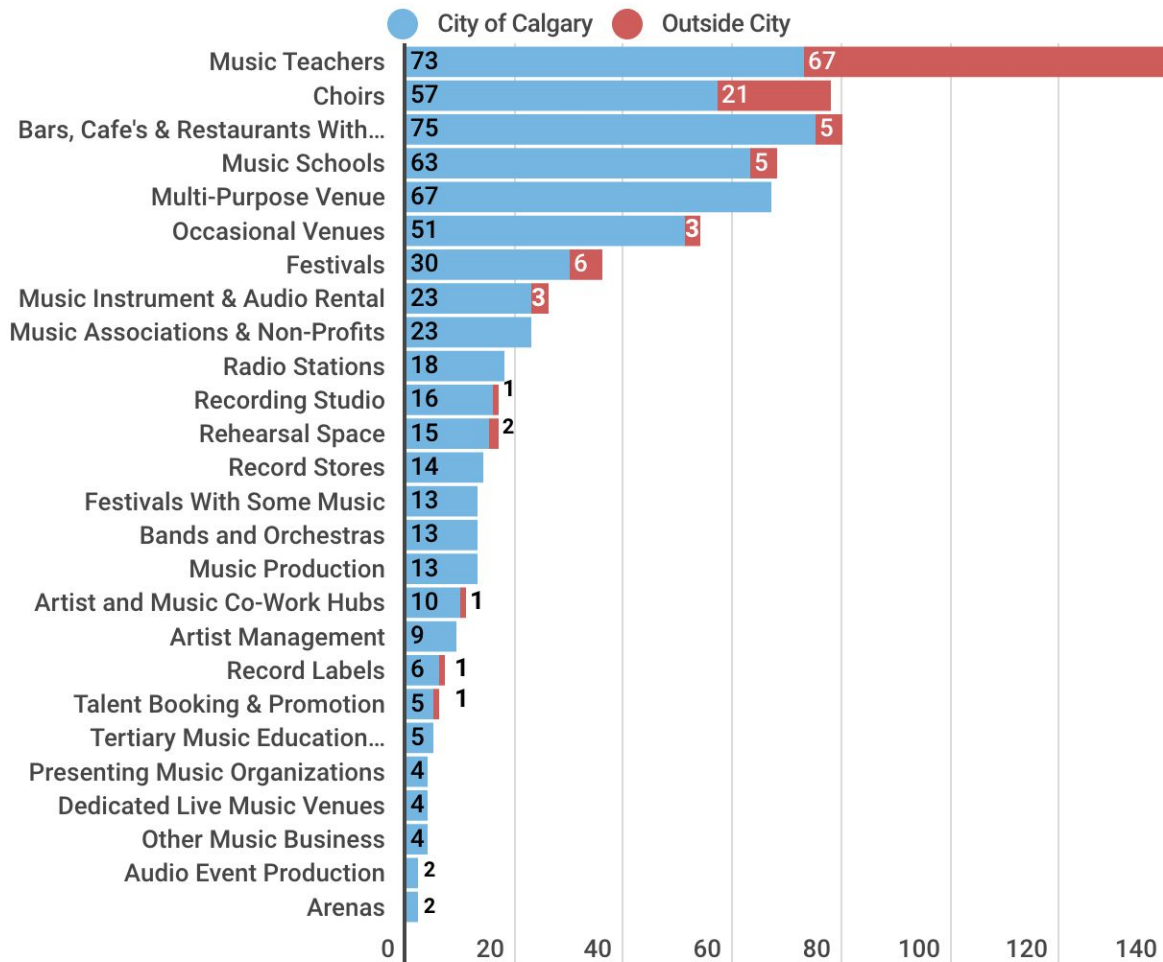
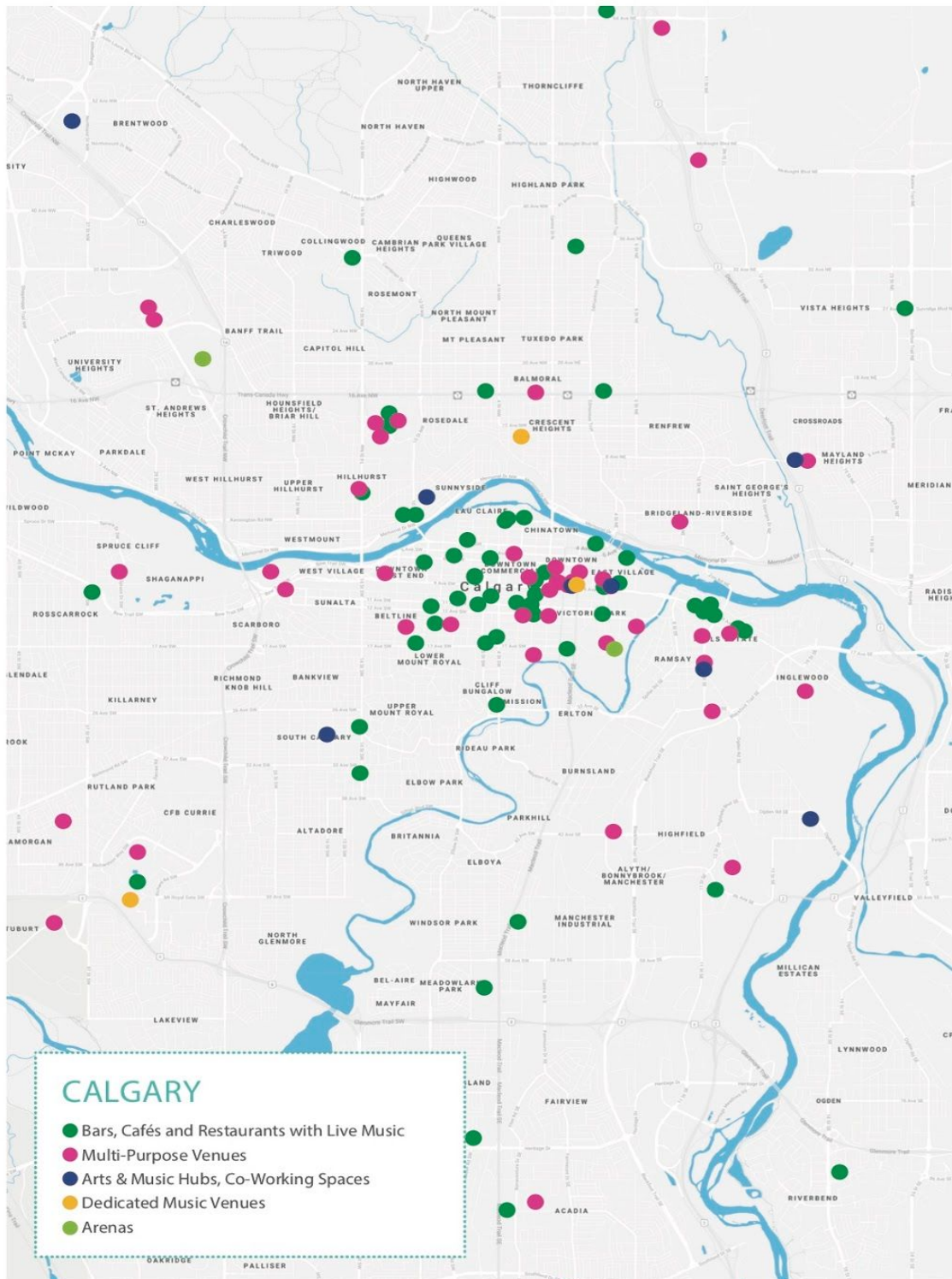


Figure 13. Overview of music assets in City of Calgary and Greater Calgary



In both Calgary and Edmonton the larger portion of music assets are saturated within the limits of the two cities, except for 'music teachers' who are spread across the two metro areas. Both regions boast a substantial number of choirs - 21 in Calgary and 11 in Edmonton - located outside the city. While music fans living outside the City of Edmonton have some options for spaces hosting music (25), those living outside the City of Calgary only have 4 venues.

Figure 14. Distribution of music spaces and places in Greater Calgary - map view with legend



The full list of music assets mapped for the two regions are accessible via the following webpage: <https://www.sounddiplomacy.com/music-asset-mapping-calgary-edmonton>

5. Regulatory Assessment Snapshot

To support a thriving music ecosystem, Calgary and Edmonton must lead with progressive, pro-music policies across various forms of governance. For both regions, we completed a regulatory assessment to identify policies that pertain to music. Below is a snapshot of these policies found in the regulatory assessment (a full version is provided in the appendix).

REGULATORY ASSESSMENT FINDINGS - SNAPSHOT	
EDUCATION	<ul style="list-style-type: none"> → Mount Royal Conservatory of Music provides an unparalleled non-degree in performance, while MacEwan University has state-of-the-art facilities for commercial music performance and music business training. → Banff Centre for Arts and Creativity is highly-regarded as an arts and music incubator on an international level for performance and compositional training. → The diverse educational opportunities are in need of a modernized approach, encompassing areas such as music therapy and business. MacEwan University is the only school in Alberta that teaches music business training.
POLICY	<ul style="list-style-type: none"> → Cultural policy is supported through the Connections and Exchange report in Edmonton, and The City of Calgary Cultural Action Plan; however, both cities lack music-focused strategies. → Noise-exemption permits are readily accessible; however, permanent late-night noise exempt permits must be assessed. → All-ages ordinances should be reviewed and implemented to establish a more inclusive and opportune music ecosystem.
INCENTIVES AND TAX	<ul style="list-style-type: none"> → Alberta currently has a Film and TV Incentive program, which includes a 22-30% tax incentive. However, there are no current incentive programs that support music-centred activity, which must be addressed.
FUNDING	<ul style="list-style-type: none"> → Grant and funding opportunities are in abundance throughout the province, supported by provincial, local and federal levels of government; although, a particular focus could be placed on financially supporting marginalized and racialized groups.

BEST PRACTICES

- Calgary’s busking regulations serve as a best-case example for music cities around the world, encouraging vibrancy and ingraining music into civic life.
- Late-night transit services in Edmonton represent a strong commitment to improving the night-time economy and ecosystem.

REGULATORY CHALLENGES FOR CALGARY AND EDMONTON	BEST PRACTICE CONSIDERATIONS FOR EDMONTON AND CALGARY
Restrictive public transit operating hours do not support the night-time economy.	Philadelphia has 24-hour bus lines.
Musicians and artists are in need of designated loading zones at venues.	Austin, Seattle and Nashville all have artist loading and unloading zones.
No Agent of Change Principle (AoC). ²³	London, San Francisco and the Australian state of Victoria have forms of the Agent of Change principle.
Barriers and complications when applying for permits and special event licenses.	Seattle, Huntsville AL and Chicago have instituted online permitting systems and streamlined processes.
All-ages permits and events confine hosts to restrictive procedures, even after permits expire (within 24 hours).	San Diego and Seattle have permitting procedures to support all-ages concerts.
Noise bylaws are not indicative of a strong music sector, including night-time activity.	Toronto is currently reviewing its noise by-laws, the results of which can be seen as a path forward for Halifax and other municipalities.
Limited space for music in Edmonton’s upcoming ICE ²⁴ . Calgary working to establish a mixed zone district.	Austin has 6 districts, which can be utilized as a best practice example for the province.

²³The 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.

²⁴ <http://icedistrict.com/>

No province-wide music tourism strategy to combat geographical dispersion issues associated with Calgary and Edmonton.	North Carolina’s <i>Come Hear NC</i> program or Mississippi’s <i>Birthplace of Music</i> Program are comprehensive best practice examples.
No established single-entity designated to create and establish music-friendly policy on all-levels of government.	Texas Music Office’s <i>Music Friendly Communities Program</i> is a model that can be applied in Calgary and Edmonton.
No province-wide music program or policy regarding fair pay or fair play for artists.	Musicians Union UK’s <i>Fair Play</i> scheme could be applied to all event centres and venues.
No night-time economy regulation or support, including a Night Mayor, or Night Time Manager.	London’s <i>Night Czar</i> is one example. Pittsburgh, Fort Lauderdale, Iowa City and Amsterdam are all smaller cities that also have Night Time Economy managers, Night Mayors and other representatives.

6. Survey Highlights

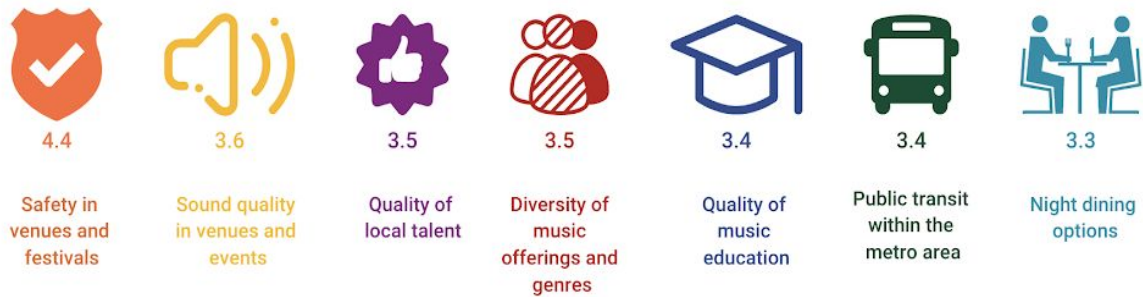
Two online surveys ran in November 2019-February 2020 (music ecosystem) and January-February 2020 (music fans). There were 594 **industry** (musicians, organizations and music business professionals) and 2,564 **music fan** respondents. The surveys covered topics such as music ecosystem strengths and challenges, artist and industry development gaps, and music audience habits. Below is a selection of key findings for each city and survey respondent type. A comprehensive survey report is included in the appendix to this report.²⁵

Calgary Music Ecosystem Findings

“Wish we could hear more local artists on radio and find out more about when & where to see them live.”

²⁵ The ecosystem areas shown below do not include all options found on the survey. Those that are included have been identified as the highest or lowest rating, and may not be the same for each city. For example, networking opportunities in Calgary scored higher than the same area in Edmonton, so it has been omitted. A comprehensive overview of all areas can be found in the appendix and survey report.

BEST RATED CALGARY MUSIC ECOSYSTEM AREAS [music fans]*



WORST RATED CALGARY MUSIC ECOSYSTEM AREAS [music fans]*

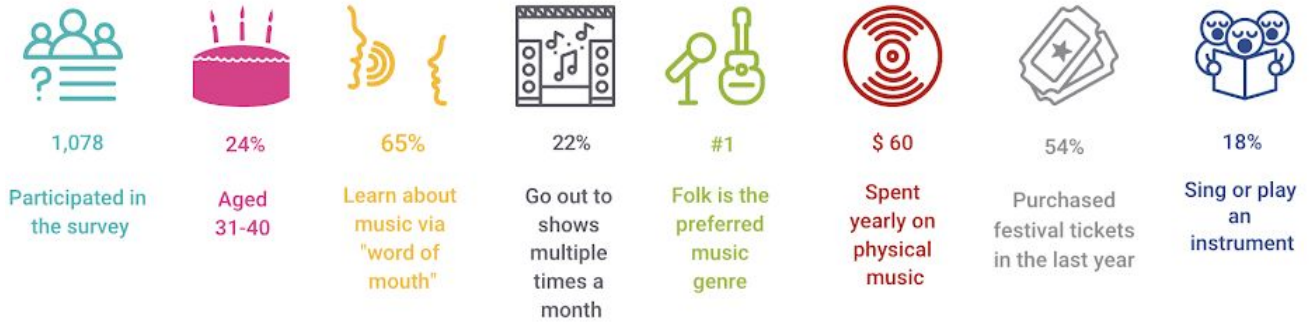


“Calgary has a lot of potential in terms of its affordability, size, infrastructure, aesthetics to be renowned as a cultural Canadian city such as Vancouver or Toronto, but the identity of Calgary should grow to be more inclusive of the arts.”

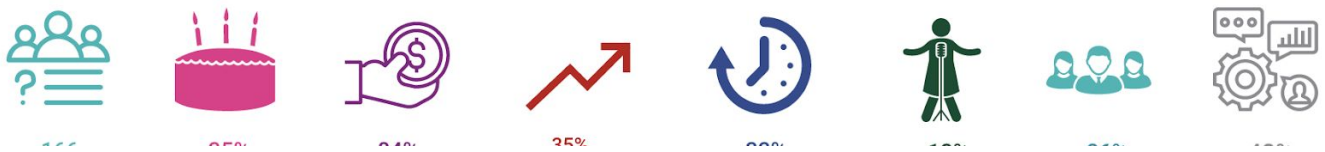
BEST RATED CALGARY MUSIC ECOSYSTEM AREAS [music industry]*



CALGARY MUSIC FAN INSIGHTS



CALGARY MUSIC ARTIST INSIGHTS



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WORST RATED CALGARY MUSIC ECOSYSTEM AREAS [music industry]*

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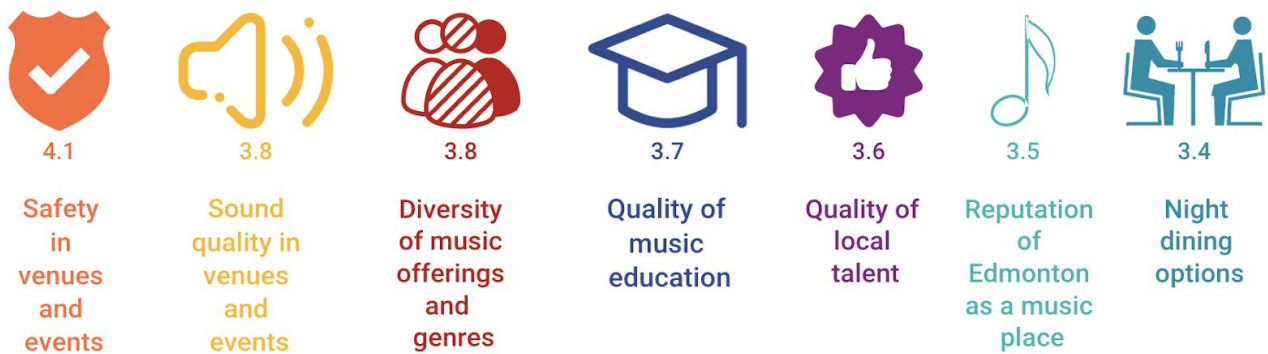
Edmonton Music Ecosystem Findings

“Many groups are not visible at many events. Ticket prices and a feeling of it not being “their event” may be factors. It would be great for music organizations to try to find ways for events to be more inclusive.”

“Music education would be greatly enhanced by local artists working with school aged children/classrooms”

Survey respondents

BEST RATED EDMONTON MUSIC ECOSYSTEM AREAS [music fans]*



WORST RATED EDMONTON MUSIC ECOSYSTEM AREAS [music fans]*



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

BEST RATED EDMONTON MUSIC ECOSYSTEM AREAS [music industry]*



4.0

Quality of local talent



3.3

Collaboration & sense of community



3.3

Performance opportunities for established artists



3.2

Availability of recording studios



3.2

Edmonton's music heritage



2.8

Reputation of Edmonton as a music place

WORST RATED EDMONTON MUSIC ECOSYSTEM AREAS [music industry]*



1.8

Collaboration with tourism agencies



1.8

Enough music industry to support musicians



2.1

Media coverage of local scene



2.2

Fair pay for musicians



2.2

Night-time public transit



2.3

Grants & investment for the music sector



2.4

Affordable work & rehearsal spaces



2.4

Networking opportunities



2.4

Laws & regulations for live music venues

EDMONTON MUSIC FAN INSIGHTS



1,410

Participated in the survey



24%

Aged 31-40



69%

Learn about music via Facebook pages and events



24%

Go out to shows multiple times a month



#1

Folk is the preferred music genre



\$ 86

Average spent yearly on physical music



64%

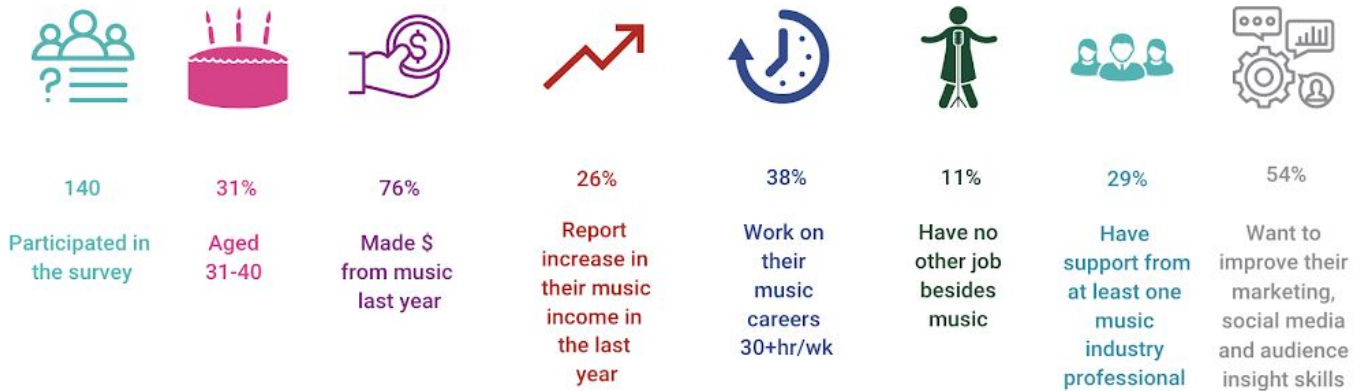
Purchased festival tickets in the last year



33%

Sing or play an instrument

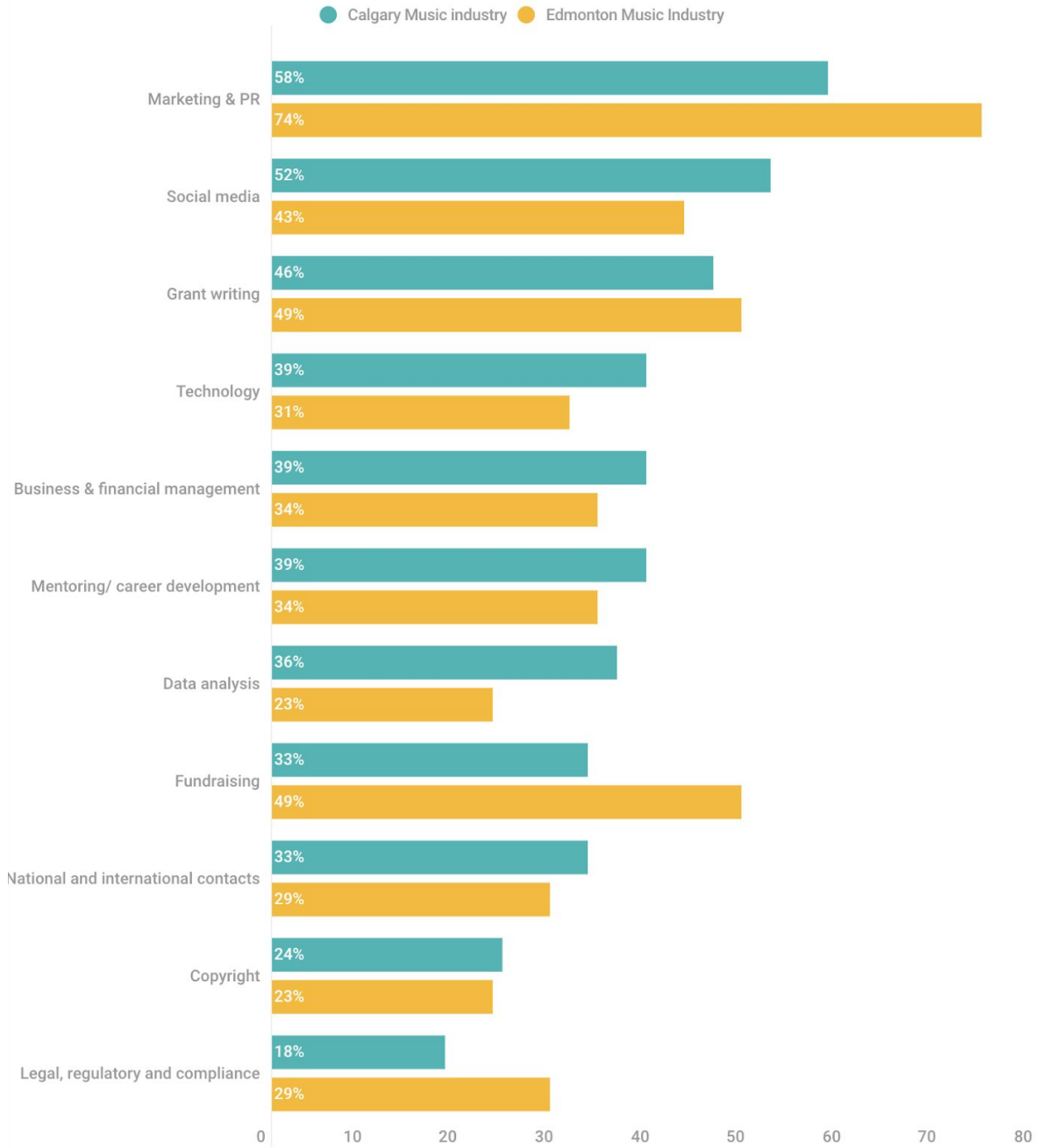
EDMONTON MUSIC ARTIST INSIGHTS



Calgary and Edmonton Music Industry Findings

We asked the music industry professionals to highlight areas of their business where they feel they need to invest more to fill skill or knowledge gaps. ‘Marketing and PR’ was the most selected business area - almost 60% of Calgary and 75% of Edmonton-based industry professionals want to strengthen their marketing skills. It is interesting to note that social media and data analysis seem much more important to Calgary businesses, while in Edmonton, fundraising, legal and regulatory compliance skills are in higher demand.

Figure 15. Areas Artist Would Like To Improve and Receive Support



7. Strategic Opportunities

This section includes recommendations for **Edmonton and Calgary** across 9 action areas. These action areas and findings also elaborate on how to address the weaknesses identified in the regulatory assessment:

1. Governance and Leadership
2. Diversity and Equity
3. Audience Development
4. Music Education
5. Artist and Industry Development
6. Spaces and Places
7. Music Tourism
8. Night-time Economy
9. Music Export

Within these 9 areas, we have outlined **30 opportunities** and **31 best practice case studies**. Each case study demonstrates the international best practice and its relevance to Calgary, Edmonton and/or Alberta.

A music economy is successful when it is viewed from a holistic perspective. Working top-down brings more validity to music initiatives, meaning local governments and decision-makers must work together to create cohesive and relevant policies to better serve music communities. Developing a music city from the bottom-up also ensures that the respective music communities are actively engaged and supporting the music ecosystem. The scope of this study focused on the development of Alberta's two major cities, Calgary and Edmonton, while also considering the actions and direction of Alberta's provincial music ecosystem. Through comprehensive research and community engagement, including interviews, roundtables and surveys, Sound Diplomacy was able to identify the strengths of Alberta's music sector, alongside the gaps that exist within the province.

To fully activate the music economy in Calgary and Edmonton, there are 18 recommendations included below which serve the specific needs of the local music sector in each city. In addition, there are 13 recommendations which call for provincial participation. The provincial recommendations should not be viewed as applicable to the provincial government only, but should also be used to inspire cities to participate in similar actions or initiatives. For example, *Recommendation 23* examines the idea of creating a province-wide music playlist for tourists and international listeners, providing a snapshot of Alberta's music identity. Although a province-led playlist is of value, music leaders in Calgary and Edmonton are capable of producing a playlist themselves and utilizing local tourism boards to promote the playlist. In order to achieve this initiative, amongst all others, it is critical that Edmonton, Calgary, and all other cities in Alberta maintain a clear channel of communication.

The following recommendations take into account the need for partnerships between Alberta's major cities. Each city will need to make distinct amendments and alterations to better accommodate their music ecosystem. Although the bulk of research and intel collected is in regard to these two major cities, feedback from the survey responses and roundtable discussions suggest that dedicated support from the provincial government is needed to take-on progressive approaches to integrating music into every city within the province.

7.1 GOVERNANCE AND LEADERSHIP

Without government participation, a music ecosystem will not grow, sustain or thrive. Alberta must embrace music to the same degree as education or water filtration systems, if it is to become a robust and attractive music province. Whether through policy implementation or music-centric initiatives, the success of a music city is dependent on a top-down approach, providing support systems and platforms for music to become a primary economic driver, while also allowing it to effectively enhance the social and cultural values of a city or province. The recommendations provided below are for local governments in Calgary and Edmonton, but these are also supported by **2** provincial recommendations.

7.1.1 Provincial Opportunities

The following **2 provincial** recommendations are provided to support Alberta's music ecosystem in its entirety, setting the foundation for the additional recommendations found throughout this report.

Opportunity Area 1: Position West Anthem as the Music Advisory Council Representing Alberta's Music Sector

Background: The growth of a strong music economy and the full integration of music into civic living requires cohesiveness and collaboration across all governments and jurisdictions. Interviews, roundtables and research conducted in Alberta strongly indicate that communication and cross-city initiatives are not being harnessed to maximize the full potential of music. Without a music-centred government liaison or representative, resolutions are rarely achieved. Optimizing music city potential means implementing practices that best serve all local cities and towns, tending to the specific needs of the local music communities, and working in conjunction with policy-makers and decision-makers through a top-down approach.

Focus: Further develop West Anthem to become the provincial Music Advisory Council by further pursuing cross-sector partnerships. Doing so will accommodate the diverse needs of each local music ecosystem through policy, cooperation and government representation. To best serve the music community, an advisory committee may consider including members from different musical backgrounds, whether professional artists, economic development agents, or cultural industry representatives.

Suggested Timeline: 20-24 Months²⁶

Potential Partners: The City of Calgary, The City of Edmonton, Alberta Music Industry Association, The Office of the Mayor, Western Canada Music Alliance, Edmonton Music Association, Music Calgary, Valley Winds Music Association, Calgary Economic Development, Calgary Arts Development, Edmonton Arts Council. Tourism Calgary, Explore Edmonton, Travel Alberta, West Anthem.

Goals:

- Strategically implement standards and policies representative of specified music needs.
- Establish a presence with governments and policy-makers.
- Create sustainable and viable regulations in support of music industry success.

Outcomes:

- Stronger partnerships amongst all levels of government and music communities.
- Proactive and competitive music practices.
- Acknowledge music as a focal point when developing or amending policies and regulations.

Best Practice Case Study - Seattle (King County) Office of Film and Music²⁷

What Is It: The Office of Film and Music, located in Seattle, Washington, focuses on advancing four primary sectors: film, music, special events, and nightlife. The dedication to advancing the music sector inspired the creation of the Seattle Music Commission, which encompasses staff from many facets of the music ecosystem. The Office of Film and Music works to establish entertainment-friendly policies, overlooks best practices for safety within nightlife operations and logistically coordinates permits for film and special events.²⁸

Who Is Responsible: The Office of Film and Music, Seattle Government, The Special Events Committee and Seattle Music Commission are all responsible for the progression of the local creative industries. Many of the staff who are involved with the Seattle Music Commission have been appointed by the City Council.

What Has It Done: From reinstating all-ages access to venues, to master film permits, a 2020 Music Vision Report and a 2008 Economic Impact Study, the Office of Film and Music has contributed a great deal to the overall functionality of Seattle’s entertainment business. The 2008 economic impact study revealed that the music industry in Seattle directly creates 11,155 jobs, with 2,618 businesses generating an annual \$1.2 billion in sales and \$487 million in earnings.²⁹

In Their Own Words: “We value music as a dynamic force that enriches the lives of residents, visitors and listeners around the globe. Seattle will be acknowledged as a

²⁶ In reference to the creation of the Toronto Music Advisory Council.

²⁷ Seattle Government (2020)

²⁸ *ibid.*

²⁹ Seattle Government (2020)

distinctive center for music where a spirit of innovation continually renews a thriving music industry, both economically and culturally.”³⁰

Relevance: Alberta has little-to-no musical representation within legislative offices, making it more challenging to promote, advocate and implement music-friendly policies. In order for Alberta to utilize the entirety of its music potential, musicians, organizations and companies must have a say alongside decision-makers and policy-creators.

Opportunity Area 2: Create Routine All-Ages Events and Venues

“We would spend a lot more money (as we can) on smaller shows in smaller venues if they weren't restricted to 18+.”

Survey respondent

Background: The regulatory assessment, alongside the interview results, indicated that there is a need for an established all-ages policy. Without all-ages venues and policies, a large section of music audiences (those under 18 years old) cannot attend the vast majority of music events or concerts. The absence of an all-ages ordinance creates a disconnect between musicians and audiences and also represents limited communication within the night-time economy and the broader music ecosystem. Part-time venues and music events, such as Under 18 Open Mic nights, can help combat the lack of all-ages venues and participation in the overall music scene. The permitting for all-ages special events in Calgary also creates restrictive regulations around operating as a liquor-service venue on the same day that an all-ages permit has been granted.

Focus: To enact an all-ages policy, or to assist in establishing less-restrictive permitting, stakeholder engagement and a policy amendment review must be enacted, bringing cross-sector organizations and decision-taking together.

Suggested Timeline: 12-24 Months^{31 32}

Potential Partners: The Calgary Police Service, Calgary Transit, Edmonton Police Service, Edmonton Transit Services, Calgary Public Safety Task Forces, and the Alberta Gaming and Liquor Commission, amongst others.

Goals:

- Utilize partnerships to devise safe and well-functioning all-ages policies.
- Engage all members of the music

Outcomes:

- More economic output from the entire music ecosystem.
- Stronger connections amongst youth

³⁰ *ibid.*

³¹ City of Seattle (2020)

³² Seattle Teen Dance Ordinance Project (2012)

community in music events through events, concerts and increased all-ages events.

and the music community.
→ Greater local music offerings and audiences.

Best Practice Case Study - Seattle All-Ages Dance Ordinance³³

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

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

What Has It Done: The All-Ages Dance Ordinance (AADO) replaces an older version, the Teen Dance Ordinance (TDO), and improves the ability to regulate potential problem venues. Under the TDO, only one license was ever successfully issued and only one enforcement action was undertaken in 15 years. The AADO ensures that any issues that arise will have more regulation, and therefore improved safe access to a broader segment of the population.³⁴

In Their Own Words: "The AADO is based on the philosophy that dance and music are positive experiences, and that people of all-ages join together to dance at Bumbershoot, Folklife, WOMAD, churches and many public events. Having responsible adults promotes safety and brings youth into the community rather than isolating them."

Relevance: Alberta does not provide an abundance of all-ages music opportunities, whether in venues or access to music stages and performances. If all-age and youth groups are not included in the music ecosystem, it can diminish the potential to be successful in creating a music city, as a mass-market is neglected.

7.1.2 Calgary Opportunities

Feedback from the roundtables and surveys indicate that the vast-majority of Calgarians would like to see improvements in regard to public transportation. The negative impacts associated with insufficient transportation can lead to a decrease in audience participation and minimal night-time engagement. It is important to recognize that this can also prevent people from working or seeking employment after transit operation hours.

³³ City of Seattle (1995-2020)

³⁴ Nick Lackata (2002)

Opportunity Area 3: Implement Late-Night Transit Programs

“Calgary Transit is not very good. Its hours do not run late enough, making it difficult to get home after events and the buses do not run often enough.”

Survey respondent

Background: The continued population growth and urban sprawl in Calgary requires a highly functioning transit system to better serve the general public. In support of this, especially within music cities, late night transportation services become a primary area of focus. Late-night transportation improves audience engagement, offering music goers and fans a safe and reliable method of travel during peak night-time economy hours. Currently, train lines in Calgary stop operating at 1:20 AM, with the majority of services being suspended until 6:00 AM. Without access to reliable transportation, audiences are less likely to participate in night-time events.

Focus: Calgary’s music and entertainment sector would benefit from an ‘after-hours’ transit line, which at the very least can operate within alcohol consumption hours, allowing the public to access train and bus lines after liquor-service has ended. Without doubt, music activation and night-time vibrancy coincide with social value and positive economic benefits. In order to yield these benefits, public transportation must be able to accommodate the demands of those who attend events, venues and additional evening activities. Calgary can further their night-time economy efforts by providing free access to transit during major events at Scotiabank Saddledome, Arts Commons, or Jubilee Auditorium and live music venues across the city on a routine basis. Activating a program of this nature entices audiences to utilize transit, instead of contributing to car congestion and traffic, or environmental footprints.

Suggested Timeline: 24-30 Months³⁵

Potential Partners: The City of Calgary, Calgary Transit, Tourism Calgary, Calgary Economic Development, Alberta Gaming and Liquor Commission (AGLC), Public Safety Task Force, Calgary Police Services.

Goals:

- Accommodate night-time activities.
- Organize a structured and strategic transit program in conjunction with safety practices (police).
- Collaborate with AGLC to understand night-time logistics and alcohol consumption regulations.

Outcomes:

- Vibrant night-time economy.
- Increased audience engagement.
- Boost in venue, bar and nightclub attendance.
- Better overall transit service to the population as a whole.

³⁵ In alignment with Vancouver Night Time TransLink implementation timeline

Best Practice Case Study - Vancouver After-Dark & Montreal After Midnight Transit³⁶

What Is It: Vancouver currently has an After-Dark Translink service, which runs approximately every 25 minutes, seven days a week. The transit line is designed to connect downtown Vancouver with outer communities, utilizing 10 'Nightbus' routes departing from the downtown district starting at 2:00 AM. Connecting destinations include the University of British Columbia and Richmond. Similarly, Montreal implemented an After Midnight transit service, including 10 bus lines, three express routes, and three airport lines.

Who Is Responsible: Translink, British Columbia's transit authority and Société de transport de Montréal, for Montreal.

What Has It Done: TransLink's Late Night Stakeholder Committee has improved late night transit services for workers and patrons of the Downtown Entertainment District, ensuring their safe and affordable way home.

In Their Own Words: "Making sure that people have a safe way home at the end of the night is a key part of building a vibrant city," said Gregor Robertson, Mayor of the City of Vancouver. "I'm pleased to see TransLink working to provide new transportation solutions for Vancouver residents and visitors who want a convenient and safe way to get home after enjoying our lively entertainment district."³⁷

Relevance: Concerns regarding Calgary's transit system were mentioned in abundance throughout the interview and survey processes. As a major city, which continues to grow further out from the core, music fans and participants face challenges when accessing events, primarily due to transit closing before most venues close - especially on weekends.

7.1.3 Edmonton Opportunities

Edmonton has worked to implement busking guidelines and an I.D program as a means of further promoting itself as a cultural city. However, there has been little compliance with the established guidelines, rendering them non-existent. The issues that arise by not having guidelines in place include negative outlooks on music and arts, as performances can be perceived as quite disruptive in quieter neighbourhoods when they are not regulated. The general public can also begin to view street performances as a nuisance, especially when performance locations can disrupt pathways and professional spaces. For this reason, Edmonton must work to redevelop and enforce guidelines that are respected and followed by buskers.

³⁶ TransLink (2020a)

³⁷ TransLink (2020b)

Opportunity Area 4: Develop Edmonton Busking Guidelines

Background: Busking and street performances are an integral addition to a vibrant music city, allowing local artists to gain recognition, improve their skills, and add social value to civic living. When there are no guidelines or bylaws, busking can become problematic and lead to negative perceptions from the general public. This is caused by equipment interfering with foot traffic at cross streets, or performances becoming a disturbance to local communities. Implementing busking guidelines also lends a hand to performers by establishing designated areas that musicians can operate in, usually placed in high-traffic areas or public parks.

Focus: Edmonton is in need of specified busking policies to better support their local musicians and performers. Successful music city policies must be structured and implemented strategically to yield long-term, positive results, which is why Edmonton should provide a framework on the time, locations, and permits needed for busking throughout their city. Furthermore, since Calgary already has a successful busking policy, it could serve as a ‘mentor’ to its Alberta neighbour, enhancing the collaboration in arts and policy-making between the two cities.

Suggested Timeline: 6 - 12 Months³⁸

Potential Partners: The City of Calgary, The City of Edmonton, Calgary Transit, Edmonton Transit, Alberta Parks, Business Improvement Districts, Stagehand, Calgary Arts Development, Edmonton Arts Council, Calgary Downtown Association.

Goals:

- Implement busking permits.
- Provide lists of high-exposure areas within guidelines for musicians and artists to perform.
- Set expectations of hours, audio system levels and occupied spaces.

Outcomes:

- Increase the professional view of busking and street performers.
- Improve artist exposure, social value and vibrancy.
- Proactively mediate noise complaints and interference with public living.
- Enhance collaboration in the arts and policy-making between cities.

³⁸ Based on The City of Calgary, where a pilot program was assessed and effectively implemented after nearly a year of identifying busking locations and restrictions. Source: Global News (2016)

Canada Spotlight - Calgary Busking Guidelines

In 2018, The City of Calgary published the 'City of Calgary Busking Guidelines' on their website to reaffirm their belief that busking is an important part of the city's identity, culture and spirit.³⁹ The City acknowledges that buskers add delight, interest and energy to festivals, events and afternoon strolls, making busking an integrated part of their music ecosystem.⁴⁰ To become a busker in Calgary, an individual must apply for a Busker ID Card and pay fees if needed. The City offers two annually-renewed ID Cards, with a third ID pilot program currently being developed. The City of Calgary developed the Busking Guidelines to simplify and streamline all required information needed to become a performer. Additional information includes regulations on age, ideas for planning performances, speaker/amplification details, merchandise, times and locations, suggested locations with high-traffic, and more.

7.2 DIVERSITY AND EQUITY

More can be done in Alberta to recognize and support female, LGBTQ2+, Indigenous and visible minority artists. This also includes individuals with exceptionalities and culturally diverse entrepreneurs. These groups face greater systemic, social and structural obstacles in comparison to others, and respondents highlighted the demand for more opportunities to address these inequities. There are a number of opportunities and actions that can be taken to address this and ensure that the music ecosystem becomes even more diverse, equitable, inclusive and accessible. Across Canada, equality is becoming a key priority, as demonstrated amongst the Black Lives Matter movements and numerous LGBTQ2+ initiatives. By taking action, Alberta and its leading cities will demonstrate a commitment to supporting the need for social change, while demonstrating support for the Gender Equality Network Canada efforts to advance gender equality in Canada, and the United Nations Development Programme Sustainable Development Goal 5: Gender Equality. The following **2** recommendations focus on provincial engagement as these issues are relatively large in scope.

7.2.1 Provincial Opportunities

Opportunity Area 5: Work with LGBTQ2+ Communities to Increase the Overall Opportunities through Music Diversity Groups, Events and Mentorship Programs

Background: A music community should be extremely diverse and inclusive, building upon the potential to fully represent the musical identity of a city or province. Diversity in Alberta's

³⁹ The City of Calgary. (2018)

⁴⁰ The City of Calgary. (2018)

music system is already prevalent; however, equal opportunity and equitable support systems are cumbersome. LGBTQ2+ communities are insufficiently supported throughout the province, in relation to music and arts. This can create barriers for artists, establish divides in music communities, or repel potential artists from starting a career in music. The industry survey identified a similar gap in Alberta’s music sector where artists from visible minorities, from both cities, have shown higher demand for skills improvement across all presented options, but most notably “legal, business, fundraising and financial management,” selected by 62%.

Focus: Work with the LGBTQ2+ community to better understand how to support artists through different channels and opportunities, which could include province-wide music network groups, mentorship programs, or greater access to education. Overall, all cities must have equitable access to this network. Events such as open mic nights are examples of how to create and implement a viable starting point.

Suggested Timeline: 12-18 Months⁴¹

Potential Partners: Alberta Foundation for the Arts, Calgary Queer Arts Society, The Pride Centre of Edmonton, Canada Council of the Arts, Alberta Music Industry Association, Edmonton Arts Council, Calgary Arts Development, established Albertan artists.

Goals:

- Work with LGBTQ2+ groups to identify which LGBTQ2+ music resources and support are needed.
- Create equal opportunity for all music community participation across the province.

Outcomes:

- Reduced barriers to music for minorities and diversified communities.
- Enriched music ecosystem.
- Increased multicultural musicians and artists.

Best Practice Case Study - The Society for Music Theory⁴²

What Is It: Located in Bloomington, Indiana, The SMT Queer Resource Group (SMT-LGTB) explores issues of gender and sexuality as they pertain to music theory and to the professional lives of music theorists. Potential mentors and mentees are encouraged to write to the co-chairs, Clara Latham and Vivian Luong, to be matched up with suitable mentors, depending on each individual’s circumstances and needs.⁴³

Who Is Responsible: The Society of Music Theory.

What Has It Done: Together with the AMS LGBTQ Study Group, SEM Gender and Sexualities Task Force, UBC (School of Music, and Institute for Gender, Race, Sexuality, and

⁴¹ Activation of this recommendation is dependent on the host. This reference takes into account the need to garner funding and program expectations

⁴² Society Music Theory (2020)

⁴³ *ibid.*

Social Justice), and Women and Music journal⁴⁴, The Queer Resource Group sponsored a Race-ing Queer Music Scholarship.

Relevance: Within the province, there are outlets and arts-centred support groups for marginalized communities. However, music does not seem to have the same platforms. It is absolutely essential that the province of Alberta begins working alongside marginalized communities, whether gender-based, LGBTQ2+ communities, or culturally diverse populations. There is a need for a province wide program or funding to support such initiatives. During this time; however, it is critical that the province begins to offer platforms and resources to create a more equitable, diverse, inclusive and accessible music ecosystem through the guidance of the aforementioned communities.

Opportunity Area 6: Partner with Marginalized Groups to Identify their Specific Music Needs, Including Women and Diverse Cultural Groups, and Work Together to Develop Routine Career Support Programs

Background: During all stages of the community engagement portions of this study, equal opportunity became a primary topic of conversation. This was also evident in the representation of marginalized groups in the survey, where only 35% of Calgary and 37% of Edmonton-based artists identify as female. Music industry professionals are slightly more equal with around 45% in both cities being female. Conversations during the roundtable sessions also uncovered that a large proportion of culturally diverse artists live outside the core of Calgary, making it harder to access the tools needed to hone artistic skills. The inequality within the music ecosystem can be caused by numerous factors. One of the most prominent being lack of resources and accessibility to programs and support groups. These must be tended to if Alberta hopes to position themselves as a quality music hub.

Focus: Through community engagement, develop a province-wide music resource group dedicated solely to marginalized groups involved with arts and music. Offerings could include project management, grant writing and career development.

Suggested Timeline: 12-16 Months⁴⁵

Potential Partners: Alberta Mentoring Partnership MentorHer, Calgary Queer Arts Society, The Pride Centre of Edmonton, Alberta Foundation for the Arts, Canada Council of the Arts, Alberta Music Industry Association, Edmonton Arts Council, Calgary Arts Development, established Albertan artists, cultural associations province wide.

Goals:

→ Work together to develop support

Outcomes:

→ Increased cultural representation in

⁴⁴ *ibid.*

⁴⁵ The implementation of this timeline is dependent upon the host; however; this opportunity will become increasingly important as the ecosystem grows.

groups and educational opportunities for marginalized communities.
→ Connect Canada-wide partnerships with other mentorship organizations.

the local music ecosystem.
→ Stronger musical identity.
→ Diversified musical offerings.

Best Practice Case Study - Toronto SKETCH Mentorship Program⁴⁶

What Is It: The Sketch Mentorship Program offers a variety of support and mentorship programs to all members of marginalized communities. Such projects include; arts-based educational programming for youth on gender identity; music mindfulness and stress management for youth formerly incarcerated; leadership-based programs, projects and events for young women of colour; and many more.⁴⁷ Mentorship programs also include classes on grant writing for projects as well as project management support groups.

Who Is Responsible: This program is run by SKETCH, which is a community arts organization controlled by marginalized youth between the ages of 16 and 19.

What Has It Done: In addition to expanding the programs offered by the SKETCH Mentorship program, there are now funding and grant options available to project managers that work with the organization.

Relevance: No matter how large or small, it is vital for a music ecosystem to offer resources to those who need it most. The Sketch Mentorship Program is a quality example of how one community group can offer career support and the diversification needed to establish an inclusive music industry. Moving forward, if such programs and resources become readily available, music will begin to thrive throughout the province of Alberta. This is especially critical in the major cities, such as Calgary and Edmonton.

7.3 AUDIENCE DEVELOPMENT

To further enhance audience engagement and participation in the music economy, the following **2 recommendations** focus on how to successfully integrate music into the lives of Albertans. These take on audience engagement from a holistic view and aim to work in conjunction with one another.

⁴⁶ SKETCH Working Arts (2020)

⁴⁷ ibid

7.3.2 Edmonton Opportunities

Edmonton has an abundance of venues, festivals and showcases available to audiences, however, when there is an over-cluttering of festivals in the city, it has the potential to devalue music. Specifically, it can cause audiences to ‘choose’ between events, especially when considering the price of tickets and the overlapping of schedules. Music communities must work together to combat these issues providing enough opportunity for fans and organizations to thrive within the music ecosystem. Doing so will allow for greater economic value, but this is only possible through careful planning and strategic action. The following 2 recommendations will work to combat some of these issues in Edmonton.

Opportunity Area 7: Strategically Coordinate Festival Events, Dates and Plans, Allowing for More Engagement throughout the Year, Avoiding an Over Cluster of Offerings

Background: Edmonton boasts an impressive number of festivals, with over 30 music festivals alone. As a result, Edmonton has earned themselves the title of a ‘Festival City’ in Canada, adding significant value to their local music sector alongside the province; however, based on our survey and roundtable discussions, Edmontonians claimed to be ‘over-exposed’ to a large number of festivals and that has led to over saturation. This is because many occur during ‘peak season’ - late spring to summer. It was recognized that the abundance of music festivals has, in some ways, decreased the social perceptions of music and its subsequent value. In addition, many of these festivals are said to be ‘free to enter’, which negates the opportunity to add monetary value to music. Feedback from roundtables and survey responses also identified that the mass number of festivals are in competition with one another, forcing audiences and performers to attend fewer events per year.

Focus: Establish strong communication channels between festival hosts and organizations, and identify ways to strengthen the overall economy. To support this, considerations could be made in unifying festival events, strategically organizing events throughout the entire year (accommodating seasonality), and in some regard, creating a festival strategy plan through the Alberta Music Festival Association. It is important to construct high-quality and engaging festivals. That is not to say Edmonton does not already provide a high calibre of events and festivals, but rather that they could aspire to carefully and purposefully devise such festivals with the overall music ecosystem in mind.

Suggested Timeline: 12-16 Months⁴⁸

Potential Partners: Alberta Music Festival Association, The City of Edmonton, Explore Edmonton, Travel Alberta, festival hosts, event and centres, Edmonton Arts Council.

Goals:

- Strategically plan festivals annually.
- Unify festival hosts by creating partnerships and a clear channel of

Outcomes:

- Improved tourism throughout the year.
- Enhanced audience engagement and

⁴⁸ Based on Sylvan Lake’s Festival Event Strategy Plan

communication.
→ Create cross-sector partnerships.

perceptions on the value of music.
→ Development of the overall music sector.

Best Practice Case Study - Treefort Music Fest, USA

What Is It: Every year in March, Treefort Music Fest takes place in various venues throughout downtown Boise in Idaho and has become a staple in the city. Founded in 2012, the multi-day music and art festival's attendance increased by 33% from 2017 to 2018 (hosting about 24,000 people in 2018).⁴⁹ As such, the organizers decided maintaining its uniqueness was of the utmost importance. Rather than maximizing the profit and supersizing the whole event by only hosting well-known major acts, musically, the festival focused on established and emerging bands, including local acts and music groups, encompassing the entire ecosystem. This not only created a multi-day super-festival" it also fused in mini-festivals revolving around breweries, personal health and creative practices.

Who Is Responsible: Visit Idaho, Boise State University Bittercreek Alehouse, Project Filter.

What Has It Done: Having hosted 260 bands in 2013, five years later, 469 acts played 27 venues throughout the city. Another special feature of the schedule are the different "forts," which offer additional programs. In 2018, attendees could choose between nine different forts: Alefort, Yogafort, Storyfort, Hackfort, Filmfort, Skatefort, Comedyfort, Kidfort and Foodfort.

In Their Own Words: "If you find a way to showcase artists from that city or that region, and weave that into the national acts that you've also booked, it can create this sense of locality but also nationality, and I think that's a really potent way to go about it."

Relevance: Treefort Festival exemplifies what happens when festival curators work together to further promote the city. The extensive list of "mini festivals" that exist in the city during the primary "Treefort Festival" allows everyone to thrive in their business, whether as a brewery or a yoga studio. This mentality would benefit Edmonton's music ecosystem.

Opportunity Area 8: Encourage Engagement in Musical Events, Performances and Showcases Through Transportation Reward Programs

Background: The price of purchasing tickets and attending music-related events continues to increase on a global scale. Music fans and concert-goers are constantly in search of "value" ticket prices, and when they are unable to acquire such value, social preferences lead to a home-body mentality. In turn, this can stunt the growth of a local entertainment sector. New

⁴⁹ Dees, Michael (2018)

event centres and facilities tend to increase concession prices as a means of recouping costs or garnering revenues, which is necessary when offering state-of-the art entertainment infrastructures. Despite this, Edmonton music fans have expressed that the prices of tickets have forced them to choose between two artists’ performances in most cases, primarily due to the increased costs of purchasing tickets, finding transportation and enjoying food or beverages at an event. This will continue to threaten the local music sector in Edmonton until action is taken and new strategies are put into place.

Focus: Work toward implementing a transportation reward program, which offers “entertainment tokens” to those who ride public transit. This reward system could credit those who reduce their environmental footprint by providing entrance to music events, museums and theatre performances. Doing so would also add value to taking and paying for transit when attending events, as they are being compensated for their efforts while effectively reducing environmental impacts. This could be done by tracking the account of transit users via monthly passes or through a smartphone application.

Suggested Timeline: 6-12 Months⁵⁰

Potential Partners: Edmonton Transit, cultural and historical venues, music venues, arenas, Rogers Arena, Commonwealth Stadium, performing arts theatres, Winspear Centre.

Goals:

- Create a rewards program/application.
- Partner with music and entertainment hubs, venue owners and local business owners.

Outcomes:

- Increased audience participation.
- Greater attendance and music-related events.
- Decreased ecological impact, in line with ‘Goal 11: Sustainable cities and communities’ of UNDP’s Sustainable Development Goals.⁵¹

Best Practice Case Study - Vienna’s Co2 Cultural Token transit program⁵²

What Is It: In order to encourage care-free travel, Vienna has released an app that tracks users’ movements and their chosen method of transit around the city. For each car-free kilometer travelled, the app stores credits known as “Culture Tokens”. Once a user stores 20 kilograms of carbon savings, which generally takes about two weeks, they get a token that can then be exchanged for a ticket to various renowned cultural venues, including the Vienna Volkstheater, the Vienna Museum, the Kunsthalle and the Wiener Konzerthaus.⁵³

Who Is Responsible: The City Council of Vienna.

⁵⁰ Based on Vienna’s Co2 Cultural Token transit program and app.

⁵¹ United Nations Development Programme (2020)

⁵² Vienna (2020)

⁵³ The Optimist Daily (2020)

What Has It Done: It is currently in a 6-month trial phase with 1,000 participants, from the end of February 2020 onward, and will be launched broadly in the fall of 2020.⁵⁴

In Their Own Words: “The real draw is the way in which the city is constantly evolving and striving to make its residents’ lives better. Quality of life is a core focus for local and national government alike,” she wrote in a piece for The Independent. ‘The city has excellent infrastructure and social care, health and education systems, but is also committed to the cultural wellbeing of its residents.’⁵⁵

Relevance: Residents and music fans in Edmonton have expressed concerns regarding ticket prices for events. This is coupled with concerns regarding access to adequate transit. Adding a reward program would entice audiences to not only take transit and participate in cultural events, it would also reduce their environmental footprint.

7.4 MUSIC EDUCATION

Artists and future musicians must have the opportunity to grow and develop in their craft, regardless of age or talent level. Modern education practices, engaging programming and progressive opportunities are all essential when working to retain talent and inspire new artists. Alberta’s educational offerings are quite extensive and are supported by state of the art buildings and accredited programming. This includes Mount Royal University, MacEwan University, University of Lethbridge, University of Calgary, University of Alberta, and Banff Centre for Arts and Creativity. Locally owned education facilities and companies, alongside Alberta music curriculums, are vital to the offerings in Alberta. This is also true for Indigenous arts and culture-based education programs. In support of the extensive music education in Alberta, the 3 recommendations outlined below work to establish a stronger music offering in the province as a whole.

7.4.1 Provincial Opportunities

Alberta is committed to fostering relationships with Indigenous peoples, allowing for representative storytelling and equal opportunity for First Nations, Metis and Inuit populations. These efforts are ingrained into Alberta Education standards; however, more can be done to provide educational opportunities in relation to Indigenous cultures, connecting Albertans to their respective traditions through music.

Opportunity Area 9: Work with Indigenous Communities to Integrate Indigenous Music Education Programs into Provincial Curriculums, in Alignment with the Teacher Quality Standard #5 (Applying Foundational Knowledge About First Nations, Métis, and Inuit)

⁵⁴ The Mayor EU (2020)

⁵⁵ H. Coffey (2020)

Background: Alberta Education establishes the K-12 curriculum for music, fine arts, and STEM programs throughout the province, providing details on core competencies and teaching expectations. This includes the Teacher Quality Standards, outlining 6 primary areas that detail the best practices for educators and instructors. Teacher Quality Standard five focuses on Applying Foundational Knowledge about First Nations, Métis, and Inuit (FNMI), indicating that all programs integrate FNMI perspectives and stories. Currently, there is not a strong presence of music programming to represent the FNMI standard. Edmonton, most notably does have an artist residency program; however not all cities in the province do. FNMI music options would be an invaluable asset if it were made available in middle-school and high school as an option.

Focus: Through community engagement, create more music education programs and residence programs with and for FNMI artists within all levels of education. This would work best if they complement education programs such as “The Blanket Exercise”, which is taught throughout the province. In addition, this initiative could aim to provide educational platforms at teacher conventions and directly to Alberta school administrations.

Suggested Timeline: 12- 18 Months⁵⁶

Potential Partners: Calgary City Teachers’ Convention, Alberta Music Teachers Associations, Indigenous Tourism Alberta, Alberta Education. Alberta Native Friendship Centres Association.

Goals:

- Harness partnerships to build Indigenous music residence programs.
- Work with Indigenous communities to develop FNMI music education programs.

Outcomes:

- Stronger music education programs.
- Proper representation of Alberta’s diverse lands.
- Progressive approach to accomplishing TQS 5 for educators.

7.4.2 Calgary Opportunities

Music therapy courses can be found throughout Calgary’s education system, primarily at Ambrose University as part of a course-based offering. Although this is a great opportunity for musicians, there are no dedicated programs focused on music therapy. The creation of an accredited music therapy program would be beneficial for student tourism, and also would demonstrate exemplary and progressive commitments to improving talent and fostering the growth of local artists.

⁵⁶ In alignment with the National Library of Medicine Residency Program Step-by-Step Creation Guide. Music education program implementation timelines are also traditionally 12-18 months, per Swansea University program developers.

Opportunity Area 10: Establish a Music Therapy Education Program that Provides Training Certifications or Accredited Credentials

Background: To solidify a commitment to music integration within a city, the use of music will need to remain progressive and innovative. In particular, this means acknowledging modern practices with music therapy and the coinciding education opportunities. Currently, Calgary does offer a diverse range of programs within their school programming, including university and after-school courses. However, creating and implementing a music therapy program into music education offerings would add significant value to Calgary’s music ecosystem. It would increase opportunities for music students and medical sectors, while also enhancing student tourism appeal and the overall reputation of Calgary as a music destination. In addition, it is important to note that music therapy has numerous positive effects, including a reduction in stress, depression, symptoms of mental psychological disorders, and managing Parkinson’s and Alzheimer’s.⁵⁷

Focus: Moving forward, Calgary would benefit by taking a progressive step forward and creating music education programs, certifications and accredited university degrees focused on music therapy. Implementing such programs would inherently open up more opportunities for Calgary to remain innovative and ensure they take a contemporary approach to their music sector. Currently, The Canadian Association of Music Therapy only recognizes practicing music therapists after the completion of a Bachelor or a Graduate Certificate in music therapy and a 1000-hour supervised clinical internship.

Suggested Timeline: 12-18 Months⁵⁸

Potential Partners: University of Calgary, Mount Royal University, Ambrose University, Alberta Education, Canadian Association of Music Therapy.

Goals:

- Establish a curriculum focused on music therapy.
- Create a music therapy certification and/or a Bachelor's degree.

Outcomes:

- Increased opportunity for music ecosystem participants.
- Unique appeal for students and music tourism.

Best Practice Case Study - CAMT - Ontario, Concordia, and British Columbia

What Is It: The Canadian Association of Music Therapists (CAMT) is a non-profit professional association that promotes the practice of music therapy in clinical, educational, and community settings throughout Canada. Started in the mid-70s, it was intended to improve the training, awareness, standardization, widespread inclusion and future development of

⁵⁷ J.Levy (2017)

⁵⁸ Based on Swansea University program developers and market intelligence specialists

music therapy practices. Currently, the only provinces that have recognized educational programs are Nova Scotia, Manitoba British Columbia, Quebec, and Ontario (2 locations).

Who Is Responsible: The volunteer Board of Directors of CAMT, which consists of 5-10 Directors elected from the general membership for a 2-year term of office.

What Has It Done: As of March 31st, 2019 the CAMT has 1,106 members across 9 membership categories, 830 of which are certified Music Therapists. They have organizations in Nova Scotia, Newfoundland, New Brunswick, Prince Edward Island, Quebec, Ontario.

Relevance: As music therapy continues to grow, more positive results continue to be released. Most recently a 2017 study concluded that music therapy provides short-term beneficial effects for people with depression.⁵⁹ Another study found similar results, this time related to stress and anxiety, concluding that music effectively reduces anxiety and improves mood for medical and surgical patients in intensive care units, patients undergoing procedures, and for children as well as adults.⁶⁰ These results exemplify one reason why Calgary would benefit by working to establish a music therapy program, accrediting their local practitioners, preventing talent drain, and inspiring student tourism. Adding such a program would indicate that Calgary is committed to improving key aspects of their music ecosystem and would exhibit exemplary practices to other cities and provinces.

7.4.3 Edmonton Opportunities

More can be done in Edmonton to collectively promote and develop the entertainment sector as a whole. Currently, there are a limited number of programs that connect the entertainment sector in its entirety. It also lacks opportunities to develop skills in musical scoring or game-sound development. Establishing connections amongst the entertainment sector would create cross-sectoral opportunities for developing artists and those enthused by music education.

Opportunity Area 11: Initiate a Program Focused on Musical Scoring (film, television, and gaming)

Background: The recent surge in music technology has lifted entry barriers to all areas of the entertainment industry, simplifying the means with which we create film, produce and compose music, or portray art. Consequently, films and music have established new means for producing high-quality content in the form of graphics or high-fidelity sound. Currently, Edmonton is offering the opportunity to learn music technology skills, accounting for these new advancements in the music industry and setting precedent in their music education

⁵⁹ Cochrane (2017)

⁶⁰ Kemper (2005)

programs. This includes music technology courses provided at Concordia and MacEwan University. It is important to recognize; however, that the accessibility to musical scoring tools and knowledge in film, TV and gaming is not offered through university degrees in Edmonton. In particular, there are no specific programs with a concentration in film, TV, and gaming composition. Ensuring that artists are able to access these programs locally is invaluable to not only education, but to artist development and music tourism. The integration of musical scoring in film, TV and gaming into the already progressive music education in Edmonton would signify that there is a strong musical presence within the city.

Focus: Edmonton would benefit significantly by initiating a degree or diploma for film, television and gaming specifically, whether on campus or online. This has the potential to produce more music education graduates from abroad through Edmonton universities, and provide local students with innovative music education. It should be noted that there is an option at the University of Alberta to take a composition degree; however, it is not focused on film, gaming and television. The particular degree focuses on acoustic composition, electroacoustic music, sound art.

Suggested Timeline: 12-18 Months⁶¹

Potential Partners: University of Alberta, Concordia University, MacEwan University, Kings University, Alberta Registered Music Teachers Associations, music professionals , AMPIA, Digital Alberta.

Goals:

- Establish music curriculum and courses for modern music practices in film, TV and gaming.
- Further expand on university programs.

Outcomes:

- Diverse and modern music education opportunities.
- Online programming used to draw in student tourism and retain youth.
- Improved perceptions of Edmonton's music community.

⁶¹ Based on Swansea University program developers and market intelligence specialists

Best Practice Case Study - Berklee College of Music's Composition for Film and TV Programs

What Is It: Berklee offers a cutting-edge curriculum that emphasizes production, engineering and recording technology, giving students the skill sets they need to get into the music business quickly and evolve along with changing techniques and applications. The school offers its renowned Music Composition for Film, TV and Games program in the form of an undergraduate degree, as well as a number of undergraduate-level courses, all available online.

What Has It Done: Berklee's innovative and technology-focused composition programs consistently rate as a leader among top global music education institutions.⁶²

Relevance: There is a need to bridge all entertainment industries within Edmonton. The growth of any industry, especially arts and culture, is set upon the partnerships and development opportunities that are provided. In the case of music and film, there are not many bridges that allow cross-sector sector partnership. Edmonton must look to establish these programs, in alignment with their already extensive list of offerings, to expose their artists to new careers and opportunities.

7.5 ARTIST AND MUSIC INDUSTRY DEVELOPMENT

Provided below are **3** recommendations aimed at strengthening the music industry, with a particular focus on supporting music entrepreneurs and enhancing artist development opportunities. These recommendations are proposed on a provincial level as they require a broader scope; however, infrastructures in both Calgary and Edmonton must be relied upon for initiation and collaboration. This is done to ensure equal opportunities and access across the entire province.

7.5.1 Provincial Opportunities

The music industry is evolving at a rapid rate, whether in regard to consumption or production. Artists must be equipped with the knowledge to adapt to these changes and learn how to operate their brands and music through real-time experience, and in doing so, must have access to resources that help maintain their successes. The **3** recommendations below focus on these particular areas for all artists throughout the province.

⁶² J. Bond (2018)

Opportunity Area 12: Provide Musicians with Development and Education Opportunities Surrounding Modern Career Development

Background: The music industry has undergone rapid change due to technology, lifestyle changes (streaming/video), and music accessibility. Artists and music professionals must be privy to the climate of the modern-day music industry to establish sustainable and prosperous music careers. Edmonton and Calgary, and Alberta as a whole, present developing artists with many education opportunities, whether through the Mount Royal Conservatory, the Studio Bell National Music Centre, MacEwan's University music programming, or the Banff Centre of the Arts. However, interviews conducted in Calgary and Edmonton indicated that artists are not provided with enough opportunity to learn about career management and modern business practices for the arts. As a result, artists and music managers feel like musicians are not able to maximize the use of grants, for example, or promote themselves in a manner that separates them from other artists.

Focus: To further support local artists, advanced education programs could be offered in Alberta, focused specifically on music business management, career management and career development. By utilizing already established music faculties and the knowledge of mature local artists, a university-level degree, diploma, or after-school program would begin developing a modern music business offering in the province.

Suggested Timeline: 12-18 Months⁶³

Potential Partners: University of Calgary, Mount Royal University, MacEwan's University, University of Alberta, Concordia University, Alberta Registered Music Teachers Association, local professional artists, National Music Centre, Alberta Music Industry Association.

Goals:

- Utilize knowledge from local music professionals, musicians and teachers to create music programming.
- Offer accredited music business programming.
- Improve youth and talent retention.
- Increase student tourism offering.

Outcomes:

- Present-day knowledge on successful music business practices.
- Established partnerships amongst music communities.
- Enhanced appeal to drive student tourism.
- A comprehensive, forward-looking strategy for Alberta's music sector.

⁶³ Based on Canadian Statistical Institute of Sciences workshop design timeline.

Best Practice Case Study - Pop Akademie, Mannheim, Germany ⁶⁴

What Is It? The University of Pop Music and Music Business is in Mannheim, Germany. It is the first institution in Germany to offer academic studies in the fields of popular music and music business. It prioritizes a wide range of commercial music, including pop, rock, country, funk, hardcore, punk, metal, industrial, ambient, reggae, techno, drum n bass, and hip-hop.

Who Is Responsible: It is a partnership between Mannheim University and the State of Baden-Württemberg.

What Has It Done? The program is renowned across Germany, and leading music companies are actively recruiting Pop Akademie students and alumni. It is also at the forefront of a wider strategy that places music as one of the top priorities of the region and is one of the cornerstones of the Mannheim Model, which includes the Mannheim Music Commission and the Musikpark Mannheim, a music hub for the local industry. The university has played a major role in establishing Mannheim and the surrounding region as a key player in the music education world. Mannheim has been a UNESCO Music City since 2014.

Relevance: With new and similar advancements, Alberta has an opportunity to maintain their talent and entice new talent, given the extensive list of institutions that already provide quality music education. This means that Alberta must provide cutting-edge, modernized and realistic educational offerings, which helps prepare artists for the current music industry.

Best Practice Case Study - Beats by Girlz ⁶⁵

What Is It? Beats by Girlz (BBG) is a community-focused music technology curriculum that empowers young women (girls, non-binary and/or trans youth aged 8-18) in music technology, namely music production, composition and engineering.

Who Is Responsible: BBG uses a non-traditional creative approach providing tools, guidance and role-support to empower young women in music technology, connecting to community infrastructures. A central organization provides the BBG curriculum and supports the implementation through local chapters, while each BBG chapter is independently managed and self-funded.

What Has It Done? BBG has been successfully implemented in several regions across the US and internationally: Boston, Denmark, Los Angeles, Lisbon, Minnesota, New York City and Pennsylvania.

⁶⁴ Popakademie Baden-Württemberg (2020)

⁶⁵ Beats by Girlz (2019)

Relevance: This is a working model that could be adopted in Calgary and Edmonton. Edmonton’s Night Vision Music Academy and Calgary’s Beat Drop are already doing commendable jobs in training young people to produce music using the latest available technology. Teaming up with BBG and offering programs focusing on young women, non-binary and trans youth would empower those less represented groups in the local music ecosystems.

Opportunity Area 13: Organize and Implement a Long-Term Artist Program (12 months) that Provides Developing Artists with Professional Experiences, Educating Musicians on Career Development and Sustainability through a Practical Process

Background: There are a number of artist development opportunities spread throughout the province, whether through Banff’s Centre for Arts and Creativity, the Alberta Foundation for the Arts, National Music Centre, or Edmonton’s Academy of Music. The quality of these programs is important, but creating lengthy, intensive programs is equally as valuable. Long-term programs provide artists with realistic understandings on how to develop, maintain and sustain a career in music. This includes branding, marketing, 1-1 tutoring and writing sessions. The extensive list of artist-centred programs in Alberta is in need of a program that carries a group of artists through a supportive and lengthy program, extending further than a few months, and which is active daily.

Focus: Establish a long-term program that supports a select group of artists throughout an entire year. This program would foster and develop local talent, encourage retention, and provide real-time support in career development.

Suggested Timeline: 12-24 Months⁶⁶

Potential Partners: Studio Bell/National Music Centre, Alberta Music Industry Association, Banff Centre for Arts and Creativity, MacEwan University, Edmonton Academy of Music, Alberta Foundation for the Arts.

Goals:

- Provide artists with long-term, modernized education on career development and sustainability.

Outcomes:

- Youth and talent retention.
- Stronger partnerships within the broader music ecosystem.

⁶⁶ Timelines for implementation vary based on commitment and resource of host. This timeline is in reference to workshop planning and education programming timeline references.

Best Practice Case Study - Parachute Music One-Year Artist Development Program

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What Is It: Available to New Zealand musicians, aged 18-25, Parachute Music offers a one-year intensive artist development program where up to six participants commit at least 20 hours a week in order to harness skills related to the music business. Areas include individual touring, co-writing and sessions with industry professionals. In addition, participants are offered mentorship with Protocols and other music editing software, music industry overviews, and using a recording studio. Guidance for branding and marketing, plus performance and song-sharing workshops are also available.

Who Is Responsible: Parachute Music.

What Has It Done: Alumni from the program include up-and-coming kiwi artists such as Belladonna, Harry Parsons, Jen Turner and Indyah Madsen.

In Their Own Words: “Being an artist today is a multi-faceted thing - you're a marketer, a brand engineer, a recording artist, a producer, and a cultural challenger. We address all these angles, with hands-on mentoring from industry legends, songwriting collaborations with established artists, a chance to clock up the hours in our recording studios working on new material and being part of the wider artist community in our headquarters.”⁶⁸

Relevance: No programs in Alberta currently provide a lengthy educational experience to artists. The realities of the music industry must be properly engrained in an artist's career practices before reaching stardom. Otherwise, careers are harder to maintain. For this reason, It is important for Alberta to consider replicating a similar program.

Opportunity Area 14: Offer a Music Entrepreneur Program to Support Developing Artists, Further Harnessing and Supporting the Already Established Entrepreneurial Community within Each City across Alberta

Background: Edmonton and Calgary are recognized as top-entrepreneurial cities within Canada. Both have placed in the top 90 entrepreneur-driven cities across the country and both have been credited with having the top entrepreneurial policies, placing them in the top 10 for major cities.⁶⁹ Musicians and artists are at the core of a defined entrepreneur, as it includes building their own brands, budgeting, and marketing it to the masses. It is important that musicians are provided with the same resources and support when aiming to create a music city, especially in primary cities that are regarded as entrepreneurial hubs.

Focus: Create a mentorship and artist entrepreneur program that encompasses networking events, video conferencing from international music figures, workshops, performances,

⁶⁷ Parachute Music (2020)

⁶⁸ New Zealand Music Commission (2020)

⁶⁹ Mallett, Ted and Bourgeois, Andrea (2019)

auditions and skill management. Use already established music spaces and facilities to attract the music community, which can be supported through a drop-in fee or membership system. It is important that one city is not viewed as more resourceful than the other, and opportunities are available for access to all who request it. The resource groups that already exist, like the Cultural Management Program and the AE West Program, are a great foundation, but the key is to establish a solidified entrepreneurship program across the entire province. Occasional events will not resolve the need for artists to be treated like the entrepreneurs they are. In most cases, such resources begin to encompass much more than music groups, but rather it is inclusive of creative industries.

Suggested Timeline: 12-24 Months⁷⁰

Potential Partners: All local universities and music facilities, Alberta Music Industry Association, Alberta Foundation for the Arts, Alberta Music Education Foundation, ATB Entrepreneur Centre, Studio Bell National Music Centre.

Goals:

- Construct entrepreneurial support system for Edmonton-based artists.
- Organize networks and partnerships with global and local artists for mentor support.
- Collaborate with local entrepreneur centres (eg. ATB).

Outcomes:

- Cohesive and well-experienced music community.
- Increased participation in music-related activities.
- Strong appeal from external musicians due to the professional nature of the program.

Best Practice Case Study - Entrepreneurship Centre for Music, Boulder, CO⁷¹

What Is It: The University of Colorado Entrepreneurship Centre for Music (ECM) is one of the leading programs in the US, aimed at developing new paradigms for education, leadership, and advocacy in the emerging field of arts entrepreneurship. The centre offers both certification (undergraduate) programs and courses for credit, as well as weekly workshops with music industry experts, residencies with entrepreneurial artists and mentoring sessions.

Who Is Responsible: University of Colorado, Boulder; national and local music industry and entrepreneurial leaders.

What Has It Done: UC's program is one of the earliest and most developed music entrepreneurship programs in the states and has served as a model for programs of its kind nationwide.

In Their Own Words: "Our program recognizes the deep value of a music education beyond the professional practice of music: classes, workshops, and mentoring celebrate the many

⁷⁰ Based on The United Way's Program Design & Development Resources, supported by case studies.

⁷¹ University of Boulder Colorado (2020)

transferable skills developed during a music degree, equipping students with an even broader range of options and possibilities.”⁷²

Relevance: All musicians are inherently entrepreneurs, needing the same support systems and networks to further their career, uncover new skills and find new opportunities. The Entrepreneurship Centre exemplifies how a city can provide entrepreneurial support to emerging and established artists, which may be considered as Alberta develops their music ecosystem.

Best Practice Case Study - 2112 - Chicago, IL (US)⁷³

What Is It: 2112 is Chicago’s first incubator to foster businesses and entrepreneurs working on disruption in music, film/video and creative technology. The incubator was conceptualized and created in 2015 by the directors of Fort Knox Studios, the music rehearsal facility where 2112 is located. It was created in response to the lack of collaborative working spaces for music professionals in Chicago and to provide support through resources such as mentorships, education, and networking opportunities. Music businesses, music industry entrepreneurs and related creative industries (e.g. film/video, entertainment law) can apply for membership. Members are selected depending on the capacity in which the incubator can help them grow (i.e. available resources, network) and how they would benefit the existing music ecosystem.

Who Is Responsible: The incubator is independently managed by 2112, a for-profit company based in Chicago, IL. They do not receive any funding or incentives from the City of Chicago.

What has it done?: 2112 was the first music incubator to open in Chicago. The lack of music incubators before 2112 proved advantageous in attracting different music professionals and mentors from across the country. 2112’s central location within the larger music hub at Fort Knox has further proven advantageous in bringing together different music entrepreneurs and bands. Entrepreneurs and musicians come together in shared spaces and regular events at 2112. This has been reported by 2112’s music tech and music industry members to be a major advantage in gaining quick feedback and access to user testing pools.

In Their Own Words: “The positive feedback from the music industry and the increasing collaboration within the sector are the best aspects highlighted by 2112’s director Scott Fetters. Although their business model is sustainable, 2112 wants to further support Chicago’s music industry by providing access to capital funding. Securing financial partnerships in the near future will allow 2112 to offer access to capital for tenants and be competitive in Chicago’s accelerators and incubators ecosystem.”⁷⁴

⁷²University of Colorado Boulder (2020)

⁷³2112 Incubator Chicago (2020)

⁷⁴ Sound Diplomacy interview with Scott Fetters (2019)

Relevance: Access to resources, like-minded people and a collaborative space is common practice in every industry. However, Alberta as a whole does not provide the same infrastructures to musicians and artists. Alberta could use their current resources and spaces to facilitate a collaboration space and network for all creatives, given the support that already exists for entrepreneurs throughout the city.

7.6 SPACES AND PLACES

Music is curated and developed through the facilities and venues that play host to it. Without the spaces, or access to spaces, artists cannot effectively test their products, develop a following, or fine-tune their skills. It is essential that artists not only feel respected but that they also feel valued through their musical offerings. Finances and exposure are frequently mentioned issues within Alberta, as evident in the roundtables and surveying process. To combat these issues, there are 4 recommendations provided below that support music spaces on the provincial level, as well as within Calgary and Edmonton.

7.6.1 Provincial Opportunities

More needs to be done on a provincial level to better support artists in regard to payment expectations and standards. On a foundational level, a provincial plan or strategy could bring more validity in providing compensation to artists. The roundtable sessions indicated that artists feel as though they are undervalued, which has been a consistent problem across many music city musicians. A large number of artists feel that they are not properly compensated for their work, while organizations also implied that the lack of established payment frameworks has devalued the perceptions of the music economy in the province.

Opportunity Area 15: Implement and Distribute a 'Fair Pay' Program to Properly Compensate Artists

Background: The roundtable discussion hosted in Calgary and Edmonton indicates that artists and musicians are in need of a structured system in regard to payment and fees. Those who attended the roundtable expressed that artists are being “paid” through free food and beverages during performances rather than actual monetary exchanges. Artists also expressed that the opportunity to perform in front of live audiences or gain more exposure is often used to replace actual payment for artists’ services. Similarly, those who completed the West Anthem Survey rated fair play for musicians 2.2 out of 5. It is important that music services are viewed and respected at the same level as any other exchange of goods and services. Artists, and the music they create, become the very foundation of music city

success. What's more, the inability to garner wages for music services leads to an overabundance of 'basement musicians', who are deterred from developing their talents or pursuing their passions due to a negative perception of artistry and the subsequent work it requires to be successful.

Focus: To ensure artists, musicians, and the music community as a whole are able to thrive, Alberta is in need of a payment structure for artist labour, designed to guarantee that talent buyers, venues and hosts are not only contributing to the music economy, but are valuing the efforts of the artists-for-hire. Supporting the music economy and musicians themselves should be perceived as an investment, not as a handout. This is important if a city wants to fully develop a thriving economy.

Suggested Timeline: 1-12 Months⁷⁵

Potential Partners: Venue owners, musicians, Calgary Musician Association, Edmonton Musician Association, Alberta Music Industry Association, local music managers.

Goals:

- Develop a fair pay program for local artists.
- Organize a certification program for venues and talent buyers to abide by.
- Educate music audiences on the complexity of music industry revenue streams and the value artists bring to the city.

Outcomes:

- More financial flow into the local economy.
- Improved relationships between organizations, venues, and the overall music community.
- Positive reputation amongst artists outside of local jurisdictions.

⁷⁵ This timeline is dependent upon the action of the host; however, this is a critical component to music city success and could be initiated immediately.

Best Practice Case Study - Fair Play Guide and Database, UK⁷⁶

What Is It? The Musicians' Union advocates 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 a 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 2020, the database contains over 130 venues across the UK that adhere to the scheme.

Relevance: Intent is as important as action. Such a scheme, seen as a way to elevate the value of music spaces and places not just in the cities of Edmonton and Calgary, but throughout Alberta, will create a more welcoming music ecosystem and demonstrate to artists that all spaces and places in Alberta are talent development partners, not adversaries.

Opportunity Area 16: Facilitate Permitting and Temporary Activation of Empty Buildings and Spaces to Create Cultural Offerings For Youth, Artists And Musicians

Background: Calgary's vacant spaces are spread throughout the city, and it is an issue that many locals, primarily those who attended roundtables and took part in the survey, hope to solve through arts and culture activation. Given the spread of dormant spaces across the city, there are opportunities to use spaces to promote artistry and musicianship, either as venues, spaces for temporary festivals, or rehearsals.

Focus: Use temporary permits to create festivals, music concerts, performances or culture-related activities as a means of maximizing spaces for minimal costs.

Suggested Timeline: 6-12 Months⁷⁷

⁷⁶ Musicians Union (2019)

⁷⁷ The immediate activation of this timeline is related to the simplistic nature of applying for local permits for special events.

Potential Partners: The City of Calgary, local festival hosts, local musicians, property development companies, property management companies, landlords, building owners, Calgary Municipal Land Corporation (CMLC).

Goals:

- Use temporary permits to utilize dormant spaces across the city.
- Activate spaces on the outer-parts of the city.

Outcomes:

- Greater musical offerings.
- More audience engagement in music-led events.
- Increased opportunities for local artists.

Best Case Example - Creative Spaces, Vienna⁷⁸

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

Who is Responsible: It is managed directly by the City of Vienna and 3 other agents: a representative of the cultural industries, a representative of the real estate industry and a legal advisory company.

What has it Done?: The consortium has developed over 400 unused space activations since 1999 and signed cooperation agreements with over 100 different owners and real estate companies.⁷⁹

Relevance: The current Arts Habitat Edmonton, Edmonton Arts Council and Calgary Arts Development would serve as a primary channel of integration for a Creative Spaces initiative, considering that similar components already exist. Replication of this program would provide a strong foundation for activating unused spaces across the province, given provincial leadership and commitment.

⁷⁸ Kreative Räumen Wien (2018)

⁷⁹ Magistrat der Stadt Wien (2018)

Opportunity Area 17: Facilitate Long-Term Creation of Music Spaces (Education, Rehearsal, Recording and Performing) through Incentives to Developers of New Projects and to Redevelopers of Existing Buildings

<p>Background: Asset maps shows that there are neighbourhoods throughout the two cities that do not have purpose-built spaces to support the music ecosystem. To increase the number of music spaces throughout the cities of Edmonton and Calgary, City governments should incentivize the development and redevelopment industries through land use and taxation tools such as density bonuses, parking and other relaxations, and reduced property tax.</p>	
<p>Focus: Identify neighbourhoods lacking in music spaces and incentivize the development industry to provide those spaces as part of development / redevelopment projects.</p>	
<p>Suggested Timeline: 18 - 30 months⁸⁰</p>	
<p>Potential Partners: The City of Calgary, The City of Edmonton, developers, facility operators like CSpace, CMLC, Arts Habitat Edmonton.</p>	
<p>Goals:</p> <ul style="list-style-type: none"> → Create long term infrastructure. → Entice further development of music spaces through incentivization. → Create music spaces in underserved neighbourhoods. 	<p>Outcomes:</p> <ul style="list-style-type: none"> → Greater musical offerings in communities. → Permanent locations. → Increased opportunities for local artists.

7.6.2 Calgary Opportunities

To maximize the music potential in Calgary, there is a need to utilize the various available spaces that exist throughout the city. Calgary’s effort to activate their vacant spaces has been well supported through SpaceFinder; however, there are a vast number of unused spaces that could be used to promote culture and social value within the city.

Opportunity Area 18: Utilize Multi-Purpose Facilities and Dormant Spaces Outside the Downtown Core, Whether by Establishing Music Venues or Temporarily Activating Spaces for Culture-Focused Events

⁸⁰ The activation of this timeline is dependent on the host; however, this is recommended based on the need for cross-sector collaboration.

"I'd like to see more small venue offerings with quality music at bars, and pubs, including outside of the downtown core of Calgary."

Survey respondent

Background: The downtown core in Calgary has become the focal point for music and performing arts theatres, which leads promoters to focus marketing and promotional efforts within this region to improve the odds of selling-out events. Discussions held during the Calgary roundtable sessions determined that marketing efforts made in the outer quadrants of the city yield little results in the way of ticket sales, which could be caused by lack of transportation or inability to access parking. To further assess this challenge, asset mapping research was done to analyze the venues and facilities that exist throughout the city, which identified an inadequate number of venues that exist outside the downtown core. Creating a fully functional music ecosystem means maximizing all spaces and places that are capable of hosting music events and performances. A number of events do currently exist in the less-central communities in Calgary, such as Multiculturalism Day at the Genesis Centre, or Country Thunder in Prairie Winds Park. In addition, new music venues, such as Alvin's Jazz Club in Mahogany, that have opened in growing communities, indicate that Calgary is capable of opening fresh music venues outside the downtown districts.

Focus: Calgary can work to develop music venues and music opportunities for communities throughout the entire city, which not only increases audience engagement and cultural appeal, but also provides a broader platform for artists to perform and master their skills. Also, Calgary could aim to activate community centres, like West Side Recreation Centre and YMCA (Rocky Ridge), or open facilities and spaces throughout every aspect of the city. This includes all Calgary Recreation Centre, all Calgary public libraries, all multi-purpose venues, or outdoor spaces for festivals to allow all fan bases and music communities to access live music.

Suggested Timeline: 1-12 Months⁸¹

Potential Partners: The City of Calgary, Calgary Municipal Land Corporation, current music venue owners, Calgary Transit, Calgary Bylaw Services.

Goals:

- Work with partners to establish a music presence in communities external to downtown.
- Activate spaces in newly developed areas to include music.
- Utilize multi-purpose facilities and venues to create festivals and music events.

Outcomes:

- More engaged music communities
- Greater music-economy outputs.
- Increased performance and exposure opportunities for musicians and artists.
- More audience participation in music.
- Vibrant and attractive communities throughout the entire city.

⁸¹ The immediate call to action is based on the simplicity of applying for special event permits and licenses, which is dependent on the involvement of the host. Small or large events are both essential.

Best Case Practice Case Study - Night Out⁸² and Young Promoters Scheme⁸³

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

Who Is Responsible: Working in conjunction with the local authorities of Wales, the Night Out team operates a guarantee against loss for events, where ACW pays the performer fee and the community promoter pays back ticket income made at the door.

What Has It Done? About 250-300 companies/performers get booked through the scheme each year across all the art forms. ACW averages about 580 events a year, so many companies get only a couple of bookings through the scheme, though some can get longer tours. Additionally, the award-winning Young Promoters Scheme works with groups of children and young people, taking them through the process of becoming the promoters for an event in their community.⁸⁴

Relevance: Calgary's vacant spaces are in abundance. These spaces could be activated to further integrate music and culture into the city. The opportunity to utilize these spaces is quite large, and would add significant economic and social value.

7.6.3 Edmonton Opportunities

Edmonton has an abundance of venues within the city that focus on music; however, there are little opportunities for small or medium-sized crowds to attend shows as the majority take place in the newly created arena and casino in the ICE District. As the designated entertainment district in Edmonton, there is a need to create small to medium-sized venues that support musical performances.

⁸² Arts Council of Wales (2020a)

⁸³ Arts Council of Wales (2020b)

⁸⁴ Ibid.

Opportunity Area 19: Maximize Music Spaces throughout the City by Hosting Daytime Music Events and Shows, with a Particular Focus on the ICE District

Background: The ICE District has garnered a lot of attention across Canada, attracting international artists and developing a strong social community due to its many offerings. The vast number of showcases, venues, and restaurants within the district helps attract audiences of all ages throughout the week, establishing a greater social value within the core. Activities within the district are in abundance throughout the evening; however, there are gaps in entertainment attractions and offerings throughout the morning and afternoon that, if activated, would help create a more vibrant and robust cultural scene in the city. Audiences who attend daytime events should not be perceived as those in the ‘9-5’ economy. Tourists, part-time workers and night-time economy workers encompass only some examples of daytime audiences.

Focus: Aim to create day-time events, whether performances, workshops or lifestyle events, enticing more audience participation throughout the course of a day. Doing so will increase Edmonton’s social value, yield more economic benefits, and further support the overall music system. It is important to recognize that alcohol consumption does not need to be associated with day-time events.

Suggested Timeline: 6-12 Months⁸⁵

Potential Partners: The City of Edmonton, One Properties, overall general music community, cultural associations, Edmonton Economic Development Corporation, Explore Edmonton, the Downtown Business Association.

Goals:

- Activate high-traffic areas within the ICE district, through day-time events and festivals.
- Utilize multi-purpose venues throughout the entire day.

Outcomes:

- Greater economic, social and cultural value.
- Stronger audience engagement.
- Maximized potential of music spaces.

⁸⁵ The activation of this timeline is dependent on the host; however, this is recommended based on the simplicity of obtaining permitting.

Best Case Practice Case Study - Examples of Daytime Music Events in Venues, London, UK

What Is It: The Posh Club is a performance and social club in five grassroots venues across London and the South East. LGBTQ2+ club promoters Duckie host a 3-hour long event every week inspired by 1940s afternoon tea with around 100 participants, providing regular access to live music with an in-house pianist.

Morning Gloryville is a zero-alcohol morning dance party between 6.30am-10.30am that encourages people to “rave your way into the day”. Alongside music, there are complimentary massages, drinks and yoga from trained staff and dance and visual entertainment from costumed performers.

Big Fish Little Fish is a grassroots music and events organization of experienced ravers and parents who host family raves across the UK. The bespoke program includes different DJs, workshops and displays including interactive light installations. The events are hosted in venues ranging from clubs to pubs, which contribute to the atmosphere of being at a rave.

Who Is Responsible: The Posh Club, Morning Gloryville, Big Fish Little Fish.

What Has It Done? In 2016, Gloryville Won the 2016 Zero Alcohol Award for their exemplary work with substance free events.

Relevance: Edmonton’s entertainment district is not fully activated, leaving a large portion of the day available for arts, culture and music centred events. Daytime events establish an attractive vibrancy, and encourage participation in entertainment-centred events. The ICE District has the potential to inspire economic and social growth throughout the entire day, which is why Edmonton must consider some of the aforementioned initiatives.

7.7 TOURISM AND REPUTATION AS A 'MUSIC PLACE'

Worldwide, there is a clear connection between music and tourism. For example, The Americana Music Triangle in the United States welcomes 40 million visitors a year, which is estimated to be worth USD \$9 billion to the local economy. In 2017, Melbourne received a total of 5.9 million cultural tourists who stayed 62.4 million nights in Victoria and spent 20% more than other visitors.⁸⁶ In Manchester, music tourists spent over GBP £169 million in 2017.⁸⁷

In Calgary and Edmonton, while there is extensive music tourism, artists and professionals from across the music industry scored the existing climate of collaboration between tourism companies and the music sector as one of the lowest-performing ecosystem areas (only 5% gave it a positive rating in the survey). What's more, according to industry actors and fans, the two cities are not among the instantly recognized music cities in Canada and are struggling with establishing their arts and music reputation both in front of tourists, and among locals as well. Currently, Calgary is building up a "Music Mile" neighbourhood, Edmonton and Calgary's Folk Festival and Stampede are notable, and both cities have Jazz and Blues festivals. In addition, Calgary is home to Sled Island and the Alberta Electronic Music Conference. In support of these efforts, there is more that can be done to grow this component of the music sector. The recommendations below are offered as a means in which Alberta can further develop their music tourism offerings.

7.7.1 Provincial Opportunities

The following **3** recommendations are provided to support and promote the province as a music place. Considerations are made to help expose local artists to international music communities, inspire the development of local talent and fully integrate music into the tourism strategy plans of the regional tourism boards.

Opportunity Area 20: Create a "This Is Alberta" Playlist on Streaming Channels, Promoted through Tourism Departments

Background: Music is created to tell stories, oftentimes portraying the environment in which it was curated, and drawn from the inspiration of a specific region and its multi-layered dimensions. The music we hear in different parts of the world is true to those areas, which is no different in Alberta. When music fans and tourists visit a new city or country, they often find themselves submerged in the arts and culture of that specific region. At times, this becomes a primary means of introducing new music onto playlists or leads to the discovery of emerging artists. As Alberta develops its brand as a music place, they could take advantage of their already established tourism industry by offering newcomers a playlist or music channel depicting the identity and talent of Albertan artists. Music playlists already exist in Alberta, many of which place a focus on locally based talent; however, a merging of these playlists to

⁸⁶ Music Victoria (2018)

⁸⁷ UK Music (2019)

create an ‘overall understanding of Alberta’s civic-identity’ is essential. Doing so would allow visitors and international listeners to tap into the music industry that already exists within the province, exposing Alberta’s music to international markets, and shaping the identity of Alberta’s civic nature. The creation of a music playlist could then be broadcasted through as many tourism channels as possible, creating advertisements at airports, local radio stations, hotels or transit stations. A simple slogan, “listen and live the Albertan experience,” accompanied by the playlist name and providers would serve as a great way to draw in listeners.

Focus: Devising a playlist that will place listeners directly into a state of feeling like they are part of the city, allowing them to connect to the land and the music simultaneously. This playlist may need to be updated routinely, and can be used to portray the many different genres that exist in the province. As the playlist grows, there is potential to develop separate lists that focus primarily on hip-hop or blues, for example, reaffirming that Alberta has a strong and diverse music sector. It is recognized that Alberta Music Industry Association has already established a playlist of local artists available on streaming channels. This is a great foundation for showcasing artists, but is not a tourism based playlist. The concept of a “This Is Alberta” playlist is meant to tell the stories that encompass Alberta’s rich music identity. Stories of Indigenous perspectives, historical songs launched in Alberta’s music industry, and a real connection to musical heritage within the province is key. It is even more important that this playlist is positioned in tourism initiatives across the ecosystem, and does not ‘belong’ to a single entity.

Suggested Timeline: 6-12 Months⁸⁸

Potential Partners: CKUA, Alberta Music Industry Association, Travel Alberta, Tourism Calgary, Explore Edmonton, Calgary Transit, Edmonton Transit Service, Shaw, Telus, Rogers, hotels, local airports and radio stations, and Bow Valley Folks Club.

Goals:

- Curate music playlists derived from Alberta made artists.
- Tell Alberta's story through music.
- Introduce locals and visitors to local musicians and artists.

Outcomes:

- Better reputation as a music dense province.
- Increased collaboration opportunities for artists.
- Enhanced experience for visitors and locals alike.

⁸⁸ Playlisting is a trial and error process. The immediate call to action will allow for instantaneous promotion of local artists and tourism appeal, and also always for more rapid iterations of the playlist.

Best Practice Case Study - City of Melbourne Playlists⁸⁹

What Is It: In 2019, as part of its Music Plan,⁹⁰ the City of Melbourne announced it's promoting a series of Spotify playlists, curated by a diverse selection of local music industry representatives. The playlist series called 'Looking Out, Looking In' aims to showcase Melbourne's breadth and depth of musical talent across a myriad of genres. Each playlist is accompanied by a 30 seconds video trailer, presenting its curator and their relationship to their home city. The video spots are available on Melbourne City Council's YouTube channel.⁹¹

What Has It Done? The playlist series has so far showcased three emerging music artists from music genres such as R&B, jazz, hip/hop, indigenous and pop, and when fully populated, will feature over 4 hours of music from Melburnian talent.

Relevance: Alberta and its two leading cities have a diverse pool of, often unrecognized, talent spanning across genres. Emerging and established local musicians deserve to be recognized as a creative, cultural and economic force by locals and visitors alike. By collaborating with music industry figures in curating the province's unique 'sound', Alberta will strengthen its cultural appeal to locals and visitors alike and will show support in growing its musical talent.

Opportunity Area 21: Offset the Costs of Booking International Artists by Drawing in Musicians to Record in Alberta through a Reimbursement Program

Background: To capture the attention of international artists and music professionals, there must be leading-edge incentives and opportunities within the respective jurisdiction. International contributions to a local music sector are as invaluable to local artists as they are to the overall economy. Artists are often compelled to travel to new cities around the world to draw inspiration for upcoming projects. When an artist is introduced to a new place, the outcomes can either lead to increased tourism, stronger belief in music outputs, or both. Quite simply, international artists draw in more artists. For example, Kanye West's arrival in Wyoming two-years ago drew in an additional 300-400 rap artists to the state, whether for collaboration opportunities or on the advice of other artists.⁹² Subsequently, West also sold \$500,000 worth of his new Wyoming merchandise in under 30 minutes upon a clothing release. This garnered international attention for the entire state and allowed for effortless tourism promotion. The impact of musicians on local music economies can be invaluable

⁸⁹City of Melbourne (2019)

⁹⁰City of Melbourne (2019)

⁹¹City of Melbourne (2018)

⁹²Wyoming News (2020)

when properly activated. Especially when there is intent and strategic efforts in place. Such initiatives help to combat the rising cost Albertans incur when booking international gigs, as it draws artists in through a different channel, but yields similar results.

Focus: Incentivize international artists to record in Alberta by offering a 10-20% reimbursement when artists complete projects. Align this initiative with Alberta's accredited music facilities and harness the already established tourism attractions (nature, festivals).

Suggested Timeline: 24-36 Months⁹³

Potential Partners: Government of Alberta, Banff Centre for Arts and Creativity, Studio Bell National Music Centre, MacEwan University, Travel Alberta, local governments, local studios.

Goals:

- Collaborate to develop a rebate or reimbursement offerings for international recording artists.
- Engage all levels of government and civic population.

Outcomes:

- Greater international recognition.
- Collaboration opportunities for local music professionals.
- Increased exposure to the music sector.

Best Practice Case Study - Record in Iceland Initiative⁹⁴

What Is It: Record In Iceland is an initiative to boost the Icelandic music and tourism industries by offering recording studios and spaces to producers, coming from across the globe. The initiative is run by Iceland Music and the promotion office, Promote Iceland. By encouraging producers to migrate and publish music in Iceland, reimbursements up to 25% are incurred.

Record In Iceland has three main interests in offering studios to:

- Studios and Producers: a large selection of studio facilities, staffed with professional producers;
- Film Scoring: Icelandic film composers are influential artists worldwide;
- Talent: a pool of talents, such as composers, arrangers, session players, orchestras and choirs.

Who Is Responsible: Iceland Ministry of Industry and Innovation, Iceland Music, Promote Iceland.

⁹³ Implementation timelines for this initiative vary. The provided recommendation takes into account the need to organize funds and policies.

⁹⁴ Record in Iceland (2020)

What Has It Done: Within the last decade, the organization gained international recognition in the music sphere and as of 2018, more than 1,210 international gigs took place in Iceland.

Relevance: There is a need to provide incentives and reimbursement programs in Alberta, as there are none currently in place. Without such programs, artists begin to relocate in an effort to find support systems that further their career. Alberta's lack of similar programming will become problematic if it is not resolved prior to them becoming a 'music hub' in Canada.

Opportunity Area 22: Fully Integrate Music Tourism into Tourism Strategies and Offerings, Making it a Focal Point of Attraction through a Strategy or Action Plan

Background: Visit Calgary and Tourism Calgary actively include music in their promotional offerings, focusing primarily on Music Mile and festivals. The foundational support for music within tourism boards is essential to music city success; however, strong music ecosystems require full integration of music into tourism strategy and development. Tourism Calgary has just reached its halfway point for the most recent 2018-2020 strategy, making this an opportune time to collaborate with music agencies and representatives while working to develop their 2021 objectives and visions. In conjunction with Calgary, Explore Edmonton also promotes music throughout its most recent 2019 Business Plan. To effectively integrate music tourism into Alberta's offering, Calgary and Edmonton tourism representatives could connect and collaborate with one another. The strengthening of the overall music market for the province requires partnerships and communication channels between the two major cities (Calgary and Edmonton), understanding the assets, and working progressively to support music. Doing so will minimize competition and develop a better understanding of the music climate in each city. Seasonality impacts the culture and music scene in Calgary and Edmonton, but is supported in Edmonton's Winter City Strategy and the newly formed Winter Festival Collective in Calgary. Block Heater Festival and Big Winter Classic in Calgary would benefit, even more so, by garnering strategic support through action plans and by utilizing such a strategy to create a collaborative Winter City Strategy for both cities.

Focus: Develop a music tourism strategy and integrate it fully into provincial and local tourism boards or convention bureaus. This includes music market promotion on websites, newsletters and magazines, alongside developing partnerships with other local cities. A music strategy may also encompass the diversities in genres and cultures that represent Alberta's music industry.

Suggested Timeline: 12- 24 months⁹⁵

Potential Partners: Travel Alberta, Explore Edmonton, Tourism Calgary, Banff and Lake Louise Tourism, Tourism Lethbridge.

⁹⁵A Music Tourism Strategy is activated based on the discretion of the host. This recommended timeline is based upon the future developments of the music ecosystem, in alignment with this report.

Goals:

- Create a province-wide music strategy.
- Organize tourism partnerships amongst Alberta's main cities.

Outcomes:

- More performance and artist options for music fans.
- Greater economic output.
- Strong inter-provincial relationships.

7.7.2 Calgary Opportunity

Calgary is in a unique position to leverage its music spaces and venues to create a stronger international presence with global music communities, primarily by playing host to major music events. The Studio Bell, home of the National Music Centre, is already working to draw attention and expose the world to Calgary's music offering. Building on their success, there is an opportunity to host global events and attract even more attention from global audiences.

Opportunity Area 23: Engage in Global Music City Conferences and Events

Background: To become a global music city, it is critical to establish a presence at music city events and become part of the international music conversations. Participation in global events not only increases the reputation of a city but also gives access to information on current practices and progressive approaches to maximizing music ecosystems around the world. As a developing music city, Calgary needs to engage more with the international music community as a means of increasing its tourism and solidifying itself as a music place. The landmarks and natural attractions in Calgary, alongside the surrounding areas such as Banff, already draw in international tourists, which coincides with festivals such as Calgary Stampede and Banff Mountain Film Festival. Utilizing these tourism assets would allow for easy integration into international markets and music city conversations.

Focus: Involve The City and its music ecosystem with networks and conferences such as Music Tech Fest, UNESCO, Midem, or Winter Music Conference.

Suggested Timeline: 6-12 Months⁹⁶

Potential Partners: UNESCO, SXSW, Music Tech Fest, Reeperbahn Festival, Music Cities Convention, The Great Escape.

Goals:

- Build international relationships with key music-city actors.
- Establish a presence at global conferences.
- Promote tourism and reputation.

Outcomes:

- Increase to global tourism appeal.
- Strong relations with international partners.
- Increased learning opportunities.
- Improved perspectives of Calgary as a music city.

⁹⁶ The activation of this recommendation is dependent upon the host.

Best Practice Case Study - Music Tech Fest⁹⁷

What Is It: Music Tech Fest (MTF) is a digital-based community that routinely hosts events to discover, test, or effectively welcome new music technologies in the global music market. The community surrounding Music Tech Fest encompasses several fields of study, including academia, trade fairs and concert halls.

Who Is Responsible: The inception of Music Tech Fest was developed through a research project launched by the FP7, a European research group focused on the advancements of music technology. The research group is situated in different regions across Europe which includes: The Centre Pompidou in Paris and Barcelona Music and Audio Technology (BMAT), Barcelona, Spain. Michela Magas, the Executive Director of the research group utilized the findings to launch MTF with the support of EMI, BBC, Spotify, SoundCloud and Shazam.⁹⁸

What Has It Done: Since the initial launch of Music Tech Fest in 2012, there has been a total of 19 events in different countries around the world. In March 2014, researchers from Microsoft Research, MIT, Harvard, Oxford, McGill and Rutgers, working with the creators of MTF to establish an international Manifesto for the Future of Music Technology Research which has since been signed by hundreds of supporters, including those involved in science, arts, industry and politics. In 2018, the MTF became the first multi-gender tech platform to have over 50% women involved across all activities and hosted over 800 people at the KTH Royal Institute of Technology in Stockholm, Sweden.⁹⁹

Relevance: The attention garnered by the Music Tech Fest, as well as the public engagement of music audiences, can serve as a model for how valuable partnerships and international recognition can yield positive results for a city or province. Some of the most valued names in music and technology, such as Spotify and Microsoft, eagerly take part in music advancements and endorse the importance of music evolution each year at MTF. In less than 10 years, this festival has facilitated mass music tourism, promoted equality, and improved the perception of each city that is able to host this trailblazing event. Berlin, Boston, Frankfurt, Genoa, Helsinki, London, Paris, and Stockholm are just some examples of hosting locations. Montreal, Quebec has also been involved with the developments of MTF, indicating that Canadian cities, like Calgary, can also gain access to these multifaceted music communities.

⁹⁷ Music Tech Fest

⁹⁸ *ibid.*

⁹⁹ *ibid.*

7.7.3 Edmonton Opportunity

Edmonton's reputation as a music city has grown substantially through the development of its ICE District, amongst the wide array of music venues throughout the city. In support of this, the city has a rich musical history that could be harnessed through partnerships with local tourism boards. In doing so, the city could also leverage the diverse genres that encompass Edmonton's music identity.

Opportunity Area 24: Engage the Music Industry in Edmonton's Tourism Offerings and Expand Genre Promotion

Background: Edmonton lives and breathes music, and the city is already making dedicated efforts to showcase this with initiatives such as the YEG International Airport Live Music program, and by highlighting Edmonton's vibrant venues and events offered on the city's visitors portal.¹⁰⁰ Music fans and industry members both recognize Edmonton's reputation as a 'music place' - it is one of the highest scoring local ecosystem assets in the survey. Yet, over 80% of the Edmonton music industry professionals surveyed say collaboration with the provincial and local tourism authorities is a challenge. This means that while music is celebrated, the ecosystem is not. The music industry can be a key partner in any future tourism campaigns. This would culminate in a number of initiatives: utilizing artists to tell their stories of Edmonton, featuring local music in campaigns, creating marketing material to support all festivals and events and mapping music tourism assets. Edmonton has one of Canada's most genre-diverse ecosystems, with robust classical, country, electronic music, jazz and hip-hop communities, which is a competitive advantage compared to other cities. However, this is not communicated as a reason to visit.

Focus: Engaging the music industry in developing this narrative by having an industry ambassador embedded in the city's destination management and marketing organization would help uncover, promote and better create these stories. Utilizing artists as storytellers, guides and ambassadors would promote more diversity and inclusion and tell a truer story of Edmonton, home to one of the most diverse music ecosystems in Canada, along with sports, food and other culture. Furthermore, artists could design 'what to do after your meeting' guides to be attached to Edmonton's Meetings & Conventions Team strategies to promote the wider evening and night-time offer in Edmonton and other municipalities to business tourists.

Suggested Timeline: 8-16 Months¹⁰¹

Potential Partners: Edmonton Tourism, Travel Alberta, local artists, music industry stakeholders.

Goals:
→ Collaborate with industry and music

Outcomes:
→ Stronger, authentic tourism brand.

¹⁰⁰ Explore Edmonton (2020)

¹⁰¹ The activation of the timeline is dependent on the host. Immediate action, through partnerships, is ideal.

talent.

- Utilize artists from key genres as storytellers, guides and ambassadors.
- Embed local music in Edmonton Tourism's initiatives across marketing, sports, events, destination development, meetings and conventions.

- Increased relations with the local music ecosystem.
- Increased appeal to a wider range of visitors.
- Improved perspectives of Edmonton as a music city.

Best Practice Case Study - Aarhus Music Tourism, Denmark¹⁰²

What Is It? Visit Aarhus has multiple directories for showcasing the live music in the city, such as Music on Stages and Free Experiences, and it hosts other pages promoting local music festivals. This was done in partnership with PROMUS¹⁰³ (Production centre for music, film, stage, literature, arts, dance, etc.) who lead Aarhus Events – a city event office. It is also planning a 'Year of Music' in 2022.

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

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

Relevance: In Aarhus, the local music industry is engaged in how the city thinks about itself in terms of its marketing. Artists are engaged in the development and production of marketing campaigns and music is embedded in destination marketing. This collaborative approach is what can develop music tourism across the province of Alberta, which will create opportunities, jobs and importantly, those moments that stick with the traveller long into the future.

¹⁰² Visit Denmark (2020)

¹⁰³ Promus (2015)

7.8 NIGHT TIME ECONOMY

“It is important that venues are clean, have seating, parking/public transportation, and other businesses open late nearby to create a culture where going out is actually enjoyable.”

Survey respondent

A thriving night-time economy has the potential to revitalize a city and can inspire significant economic outputs. However, safety, regulation and entertainment offerings must all be carefully implemented and mediated to ensure those participating in night-life are safe. This is true as well for those employed by night-life operations. The night-time economy is recognized as the ‘other 9-5’, primarily taking place between 7:00 PM and 7:00 AM. Collaboration and government participation are key components to a robust night-time economy. Included below are **3** recommendations that will assist in creating a high-functioning night-time economy within Calgary, Edmonton and the broader province.

7.8.1 Provincial Opportunities

The oversight of the province's night-time economy would be best supported and handled by a committee, responsible for ensuring best safety practices, transportation, permitting and all-ages access. Without the support of a night-time office, there would be several barriers in establishing and sustaining effective change.

Opportunity Area 25: Organize the Creation of a Night-time Operations Office and Advisory Board

Background: The two major cities in Alberta (Calgary and Edmonton) cease liquor service by 2:00 AM, as stated by the Alberta Gaming and Liquor Service. By 2:30 AM, the vast majority of venues are completely shut down, with little-to-no activity occurring until ‘9-5’ business hours take place. When there is no access to venues or entertainment, a city becomes dormant and in most cases, loses the ability to optimize late-night activities. A city's night-time economy has the potential to create the same, if not more economic impact than the traditional 9-5 output. Music cities become inherently successful by activating their night-time economy, which not only contributes monetary benefits, but strengthens the cultural and social values as well. In Alberta, maximizing the night-time economy, or the ‘other 9-5,’ is a crucial step in developing talent, increasing youth retention, and enhancing tourist appeal. Developing a night-time economy requires strategic thinking and purposeful planning.

Focus: Alberta can aim to create a night-time operations officer, who will overlook areas such as public safety, transportation, and alcohol consumption by-laws. It is important to recognize that the night-time economy does not require the use of liquor and gaming activities, but rather a more meticulous approach to measuring and increasing employment, while also strengthening entertainment and appeal. Whether this involves after-hour venues, late-night

transportation, noise-regulation amendments, or a combination of each, Alberta is capable of establishing a position or role dedicated to night-time economy.

Suggested Timeline: 24-36 Months¹⁰⁴

Potential Partners: The City of Calgary, The City of Edmonton, AGLC, transportation services (transit and private), and police and EMS services.

Goals:

- Delegate a night-time representative tasked with maximizing economic benefits associated with evening activities.
- Organize safety and transportation practices.
- Develop partnerships with regional policy-makers, venues, and the general public.

Outcomes:

- Increased employment.
- Long-term youth and talent retention and/or appeal.
- More showcase opportunities for artists, performers and entertainers.
- Larger economic outputs generated from night-time activity.
- Increased attendance due to early evening shows supporting the post 9-5 working economy.

Best Practice Case Study - Portland Safe Nightlife Committee¹⁰⁵

What Is It: A committee and partnership amongst bars, clubs, government, law enforcement, music venue owners, public safety, public health and community partners working together to build a safe and vibrant nightlife in Portland.

Who Is Responsible: Big Village coalition, which also includes the Youth Empowerment Committee and Youth Action Committee.

What Has It Done: Not only have they facilitated improved communication between local stakeholders, they also promote and provide a guideline of best case practices for bars in Portland. Some issues addressed in the guideline include emergency evacuation plans, crowd management, security training, sexual assault prevention, ID protocols, discrimination training, and community relations.¹⁰⁶ In addition, they advocate for state and local policies that encourage a safe nightlife environment.

Relevance: To sufficiently serve the audiences and those who participate in night-time activity, Alberta will first need to ensure safety precautions and measures have been thoroughly examined, implemented and revised. Currently, there are night-time safety task forces throughout the cities in the province; however, better serving the province in regard to night-time safety requires consistent mediation, assessment and training, which is much more impactful on the provincial level.

¹⁰⁴ The timeline is in reference to the creation of a Night-time Czar In New York City.

¹⁰⁵ Big Village (2020)

¹⁰⁶ Big Village (2015)

Best Practice Case Study - Club Health Conference, Amsterdam¹⁰⁷

What Is It: Since 1997, Club Health conferences have been tackling issues regarding nightlife, substance use and related health issues. Since 1999, they have been held bi-annually in Australia, North America and throughout Europe. The purpose of the conferences is to understand the impacts of nightlife activity, develop and maintain safe nightlife environments by implementing evidence-based policies, and create an international, multi-agency network.

Who Is Responsible: A partnership between the City of Amsterdam, GGD Amsterdam Public Health Service and Jellinek.

What Has It Done: Club Health has created a global network of experts innovating on topics ranging from sexual harassment to drug legislation. It brings together municipal and state policy-makers, public health planners, medical and nursing practitioners, drug and alcohol service providers, criminologists, local authorities, transport sector and government agencies, representatives of the various nightlife industries all to create a better environment for the citizens and customers using or affected by the night-time economy.

In Their Own Words: “The nightlife industry has an enormous economic and cultural value to the city and the country. But it comes with challenges such as public annoyance, violation of drug laws and nightlife-related health incidents by hosting Club Health Amsterdam 2019, the Jellinek, GGD Amsterdam and the City of Amsterdam want to demonstrate how partnerships and cooperation between stakeholders can be both productive and rewarding.”

Relevance: Edmonton’s night-life safety initiatives are exemplary, while Calgary’s are not far behind. The foundation for club safety is quite strong throughout the province, providing a unique opportunity for Alberta to establish themselves as a forward-thinking, progressive province, primarily in regard to late-night safety practices. Issues surrounding night-time health and safety are in abundance across the globe, and they can result in limited engagement from audiences when they are not addressed. Alberta would benefit greatly by first recognizing the need to remain exemplary in their night-time economy safety practices, but also by working in conjunction with other cities and establishing a committee or association tasked with improving all aspects of evening/late night safety.

¹⁰⁷Club Health Conference (2020)

7.8.2 Calgary Opportunities

Calgary's current all-ages permitting is scarce and lacks flexibility for venues and event hosts. In most cases, venues and festivals cannot hold a liquor permit and an all-ages permit in the same 24-hours, nor are there any all-ages venues that routinely support the younger generation of music fans. This creates a less inclusive music community and stunts the growth of the broader music sector.

Opportunity Area 26: Develop an After-Hours Venue Permit with Regulated Late-Night Venues

Background: The foundational elements of a night-time economy include; venues, destinations, accessibility and, most importantly regulation. These elements make night-time activity as fluid and functional as the day, while placing a particular focus on culture, vibrancy and music. In Calgary, regulations cease night-time activity by 3:00 AM, with the majority of venues closing and liquor service ending by 2:00 AM. Music is also turned off well before closing time to provide enough time for patrons to usher out of venues, and public transportation is inaccessible roughly 2 hours prior to closure.. With patrons not allowed back into venues, after-hours events come to a close, negating any potential to maximize the complete night-time economy. In order to activate the night-time economy in its entirety, regulations must be amended, whether through the creation of after-hours venue permits, late night noise zoning bylaws, or both. This does not mean liquor service needs to continue, rather, the overall focus could remain on robust entertainment offerings and safety strategies. For those who participate in night-time activities, after hour venues will provide them with a place to go, adding cultural value and monetary value to Calgary's economy while also giving artists more opportunity to perform and gain followers or fans. Music cities must treat night-time policies with the same level of care, intent and planning as the day time economy.

Focus: Calgary could begin implementing late-night venue permits, building a foundation for more beneficial night-time policies and procedures in years to come. This may be done most efficiently through a year-long pilot project, which only allows venues external to the downtown core - primarily dormant spaces or smaller venues - to remain open past traditional hours. To ensure fairness, inner-city venues may then be able to apply for this extension for a fixed number of times each year during the piloting project to ensure that if any issues do arise, they can be addressed immediately and be dealt with on a case-by-case basis while testing the project.

Suggested Timeline: 24-48 Months¹⁰⁸

Potential Partners: AGLC, Calgary Police and EMS, The City of Calgary, venue owners, Calgary Transit, 17th Avenue Entertainment District, entertainment groups.

¹⁰⁸ This timeline is an extension of the recommendation to create a night-time advisory board, as it requires support from the commission. The additional 12 months is in alignment with the 24-hour Permit Pilot Project in Amsterdam, which spanned just over a year.

Goals:

- Establish late-night or after-hours venues.
- Structure permitting in alignment with zoning.
- Provide access to music well into the evening.

Outcomes:

- More vibrant cities.
- Greater economic impacts.
- Increased opportunities for artists and musicians.
- Increased employment.
- More youth engagement.

Best Practice Case Study - Extending Music Venue Operating Hours, Austin¹⁰⁹

What Is It: The Red River Extended Hours Pilot Program was a one-year initiative by the City of Austin that assessed the impact of extending the sound curfew by one hour on Thursday, Friday and Saturday nights for five outdoor music venues in the Red River entertainment area. The City of Austin held nine neighbourhood meetings and three stakeholder meetings with representatives from venues and residents during the pilot program, which took place between May 2017 and April 2018. City staff also set up a hotline for residents in the area concerned about noise. Venues committed to submitting strict sound monitoring throughout the process, and sound monitors were installed to measure noise levels inside the participating venues, as well as at hotels and homes in the area.

The pilot ended with satisfactory results: the program evaluation showed the extension resulted in a consistent increase across all venues on bar sales, ticket sales, salaries paid to staff, number of local acts booked and fees paid to local acts, all while having no significant impact on nearby neighbourhoods and reducing the number of noise complaints registered.

The successful pilot was passed into an ordinance in 2018, and the participating Red River venues now benefit from extended curfews of 12am on Thursdays and 1am on Fridays and Saturdays. Stakeholder meetings take place four times per year to ensure compliance with sound regulations, discuss ways to enhance the program and ensure the quality of life for nearby residents is not negatively impacted.

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

Relevance: Calgary needs to assess and understand their night-time market and activity before committing to a full-time venue offering. Although the end goal is to implement extended hour venues, the process of understanding the night-time economy to properly measure the needs and potential outcomes is critical to the longevity and success of this initiative.

¹⁰⁹ County of Boulder (n.d.)

7.8.3 Edmonton Opportunities

As Edmonton continues expanding on a late-night transit program, a particular focus can be placed on establishing safety measures to ensure those travelling at night, whether for leisure or for employment, are free from harm and have considerable trust in their ability to travel throughout the evening.

Opportunity Area 27: Organize and Promote Evening and Late-Night Transit Safety Strategies to Work in Conjunction with the Late-Night Transit Service

Background: The launch of a late-night transit system in Edmonton began in September 2019, adding an important asset to their night-time economy and overall music ecosystem. Five transit lines, including a newly established route, are now running until 3:00 AM seven days a week. In music cities, programs of this nature are of significant value and are viewed as best practices when looking to increase audience engagement and improve the vibrancy of a city as a whole. With these programs, the most common topic of discussion becomes safety for passengers on public transit as well as those participating in late night activities. Night-time safety is critical to a thriving economy and must remain a priority to ensure standards of care are met and the general public remains active members of music and entertainment cultures. As an opportunity, it is important to recognize that this program could serve as a model or exemplar for Calgary in late-night transportation.

Focus: Edmonton could build upon their Safety and Security Travel Tips, found on the Edmonton Transit Service Website, focusing on developing a night-time safety strategy. This could include providing safety zone locations and mapping, a public announcement and supporting document describing the police and security participation, as well as the creation of new initiatives to support passenger concerns. This will be of the utmost importance as Edmonton develops a stronger night-time economy and potentially adds additional transit routes and bus lines to accommodate more passengers.

Suggested Timeline: 1-14 Months¹¹⁰

Potential Partners: Edmonton Transit Services, Edmonton Police and Emergency Services, night-watch volunteer initiatives.

Goals:

- Provide safety strategies to late-night transit users.
- Build relations with safety commissions and local authorities.

Outcomes:

- More late-night transit users.
- Less legal infractions associated with late-night activities.
- Safer alternatives to alcohol consumption and transportation.

¹¹⁰ This is in alignment with the Vancouver Night Time TransLink implementation timeline. Within the implementation process, there were surveys and public concern interviews conducted to identify safety concerns. These were assessed within a year and initiated into their late night services shortly after.

Best Practice Case Study - Night Network Transit, Melbourne¹¹¹

What Is It: Public Transport Victoria has a comprehensive Night Network connecting suburbs and regional areas in the Australian province, including 24-hour public transport options on weekends since late 2015.¹¹² The night transit scheme has proven to be crucial to the development of its night-time economy by providing safe, easy and cheap transport options. The City of Melbourne's Night Network is designed to provide an all night train, tram, or bus service within one kilometre of the homes of 70% of Melburnians to encourage its use. Free Tram Zones available in the daytime also apply to late night travel, helping locals and tourists move around Melbourne's core activities district.

The use of the night transit network is also encouraged through the recent 'Explore the night' campaign, which shows specific Night Network routes serve Melbourne's nightlife with a focus on live music activities. The campaign includes outdoor, radio and activations in its promotion, as well as artist-curated 'Up-Late Playlists' that can be accessed by scanning Spotify codes in posters around town. Local musician Ecca Vandal produced its musical single.¹¹³

Who Is Responsible: Victoria's provincial government in conjunction with Minister for Public Transport Jacinta Allan and Minister for Police Wade Noonan.

What Has It Done: Grown Melbourne's 24-hour lifestyle, increasing the number of people in the city later in the evening who use public transport and attend bars and clubs.

Relevance: It is important for the transit services to help promote a healthy, vibrant and inclusive image for Edmonton's nightlife. It should focus on music, culture and harm reduction, rather than solely on safety issues and the negative impacts of alcohol consumption.

7.9 MUSIC EXPORT

A successful music export program offers a compound of benefits, including international reputation, local artist development, and stronger international partnerships. Cities within Alberta are already working to establish a strong music export program; however, more can be done to not only support local artists, but to support the music needs of diverse cultures. Below are **4** recommendations that will contribute to the growth of Alberta's music export offerings.

¹¹¹ Transport for Victoria (2020)

¹¹² Premier of Victoria (2015)

¹¹³ Campaign Brief (2018)

7.9.1 Provincial Opportunities

To better serve the needs of Alberta’s music community, a representative dedicated to music export programs is needed, and it should be focused on providing equitable opportunities to artists of all genres and diverse backgrounds. Currently, there are provincial export opportunities; however, there is no single-designated officer or advisor responsible for ensuring that there are a variety of opportunities for artists.

Opportunity Area 28: Establish a Stronger Local Music Export Offering, Including Increased Export-Ready Programming and Enhanced Promotion of Existing Opportunities

Background: Throughout roundtable discussions, the geographical placement of Alberta and its primary cities frequently became an area of concern. This is true despite the province having national and international neighbours in proximity. The online survey responses also indicate that Calgary and Edmonton are lacking availability to music industry professionals, such as labels, managers, agents, etc. On a range of 1 to 5, the average response graded this respective area at a 2, indicating that artists need more exposure opportunities and accessibility to music business professionals to better structure their careers. While Alberta works to increase the number of local labels, managers, and industry professionals, the establishment of a music export office would help to combat the distance and gaps between Calgary and Edmonton, and other cities. This would allow artists to use solidified relationships to organize showcase opportunities and increase the attention of talent buyers and music managers.

Focus: Alberta needs a local export office dedicated to artist development, international exposure and representation of Albertan artists on a global scale. This includes improving and enhancing export-ready programming through those responsible for the export offering. In addition, this program could be heavily promoted to increase the number of artists that participate in the program. Doing so will increase the talent pool and will help create more diversified ‘export-ready’ programming. Often artists are not privy to all their potential resources, making outreach and community engagement a pivotal component to export programming. As a whole, export programs yield positive results by allowing artists to gain new and diverse experiences, which can be infused into local music industry practices and knowledge. This strengthens the overall music ecosystem of a music city and helps prevent talent and youth from relocating to other cities that appear to have supportive infrastructure.

Suggested Timeline: 24-36 Months¹¹⁴

Potential Partners: Tourism Boards, local artist inventory lists, Music Export Canada, Music Export Summit, SXSW, A3C, Iceland Music Export, Studio Bell National Music Centre, Edmonton Arts Council, Alberta Foundation for the Arts, Calgary Arts Development, Alberta Music Industry Association, Music BC.

¹¹⁴ This timeline is dependent on the actions of the host; however, appointing a music officer and coordinator should be initiated after the creation of a designated music advisory council.

Goals:

- Establish an international presence that represents Alberta’s music scene.
- Elect a music-export officer, tasked with national and international showcasing opportunities.
- Create development opportunities for artists.
- Foster local talent.

Outcomes:

- Enhanced artist development.
- Global connections and representation.
- Access to progressive and modern music practices.
- Youth and talent retention.
- Increased appeal and recognition from non-local music managers, publishers and labels.

Best Practice Case Study - Iceland Music Export Office ¹¹⁵

What Is It: A music export office, supported by numerous international programs, which provides all Icelandic artists access to global festivals, alongside a reimbursement program for all artists who return to record albums post-export.

What Has It Done: In 2017 alone, Iceland music helped Icelandic artists perform over 1250 international shows and continues to support artists through their export and resources programs.

In Their Own Words: “Iceland Music increases the visibility of Icelandic music in the international sphere. This is achieved via a multi-strategy approach that includes building accessible, comprehensive databases, promoting Icelandic labels, bands and events, and providing information on Icelandic music to markets and the media. In this way, it encourages and helps Icelandic bands, PRs and record labels participate in events and festivals around the world – in a sense, doing some good, old-fashioned connecting people.”¹¹⁶

Relevance: Alberta does not have a music export program in place of this stature, which not only prevents artists from gaining international experience, but also minimizes the international perception of Alberta’s music scene. Roundtables and interviews frequently discussed the “geographic” location of Alberta, citing it as a problem for tourism artists. Combating this requires more external opportunities for local artists, preventing youth and talent drain.

7.9.2 Calgary Opportunities

Calgary has already exemplified the ability to host and attract music export initiatives. By furthering the offerings at the local SoundOff Summit and hosting an upcoming Passport Music Export Conference, Calgary is drawing in a lot of opportunities for artists. What may be

¹¹⁵ Iceland Music (2020)

¹¹⁶ *ibid.*

considered in this instance is the ability to build upon these programs, working to become a hub for music export programs and conferences of national proportions within the city. The following recommendations aim to achieve the goal of creating a music export community within Calgary.

Opportunity Area 29: Host Music Export Seminars and Fairs

Background: Calgary is set to host the second-part of the Passport: Music Export Conference as a means of building music export partnerships and international opportunities for local musicians. Export opportunities are critical to artist development and can play a significant role in retaining talent if artists feel like they are given the proper platform to succeed via exposure opportunities. Developing international relations with music managers, publishers and artist professionals creates greater opportunity for a local music community. Whether it's through exposure on global stages or introductions to well-connected infrastructures, music export is a key component to music ecosystem success. It is important to note that artists must understand the export process, alongside the associated versatility it creates. Currently, artists are not offered the opportunity to learn in-depth about export opportunities outside of a few select channels.

Focus: Calgary can aim to organize a music export association or fair and festival, drawing upon the knowledge of already established artists, music professionals or international consultants. Hosting routine workshops and seminars solidifies a commitment to music communities, while hosting fairs and conventions to inform musicians on export practices and methodologies can also develop a better reputation as a music city, and has the potential to become a large-scale local convention drawing in music export officers and more showcase opportunities around the world.

Suggested Timeline: 6-14 Months¹¹⁷

Potential Partners: FACTOR, Government of Canada, UNESCO, Music Cities Network, SXSW, Music Canada, Alberta Music Industry Association, Music Calgary, SoundOff Summit, the Government of Alberta.

Goals:

- Provide export opportunities and networks for artists.
- Offer frequent export-ready preparation programs for artists.

Outcomes:

- Greater international appeal for artists.
- Stronger reputation for Calgarian artists amongst international entities.

¹¹⁷ This timeline is in reference to the NIRSA Conference Planning timeline template. It should be recognized; however, that some events require longer planning, depending on desired outcomes.

Opportunity Area 30: Further Expand and Build Upon the Roots of the SoundOff Summit

Background: The SoundOff Conference, hosted by Music Calgary, places a strong emphasis on international music practices and exporting techniques - a significant addition to the value of Calgary's music ecosystem. Preparing and developing export-ready artists helps to successfully integrate Calgary bred artists on to international stages, keeping them up-to-date on modern practices and providing a platform for musicians to build diverse relationships. SoundOff and its partners have developed a reliable export opportunity in Calgary; however, these programs have the potential to be even more powerful. Adding music export information sessions throughout the summit would also be of great value. Focus should be on commercial music touring, tourism budgeting, raising music export funds, and export strategies. In addition, a local music export advisor would be a major asset to the local ecosystem.

Focus: Building upon the summit's success, local music partners could work more closely with Music Calgary to provide export opportunities to all musical genres. That is not to say this is not currently being done, but it should be acknowledged as a key element to providing equitable opportunities to all artists while also utilizing musicians to represent Calgary's musical identity. Partners should integrate diverse genres into export opportunities, accommodate the needs of artists by creating a direct export contact for the music community, and provide educational workshops regarding music export practices.

Suggested Timeline: 12-16 Months¹¹⁸

Potential Partners: Music Calgary, Alberta Music Industry Association, local musicians and managers, Soundoff Summit, SXSW, Treefort Festival, Breakout West.

Goals:

- Strengthen export opportunities.
- Unify export goals for key music actors in Calgary.
- Create a local music export expert.
- Develop solidified partnerships with international festivals and music organizations.

Outcomes:

- Increased educational opportunities for local artists.
- Strong music export branding.
- Diversified global offering of Calgarian music.
- Increased international perception of Calgary's music sector.

¹¹⁸ Based on The United Way's Program Design & Development Resources, supported by case studies.

Best Practice Case Study - European Music Export Conference ¹¹⁹

What Is It: The European Music Export Conference is supported by the European Music Exporters Exchange (EMEE) and is used to assess the current state of music export issues and challenges throughout the continent. Over 20 separate export initiatives were involved in the most recent conference, representing over 100 stakeholders.

What Has It Done: The conference was used to examine and discuss the findings of the self-led study on a European Export Strategy, released in late 2019. The conference was used to develop the final action items and areas of focus for the Export Strategy, becoming the first strategy of its kind in Europe.

Relevance: Alberta has the infrastructure and networks to develop a strong export community in their primary cities, which is evident in the upcoming Music Export Music Conference taking place at the Studio Bell, home of the National Music Centre in Calgary. Alberta is in a position to become a focal point for music talent export and export-ready programming, given the existing export programs which could be leveraged to host a large scale conference, focusing on Western Canada's music sector as a whole.

7.9.3 Edmonton Opportunities

The established Indigenous peoples within Edmonton add significant value to not only the music ecosystem, but the social and cultural offerings as well. The diversity amongst Edmonton's music community allows for a unique perspective of the local music heritage. In support of this, more opportunities can be offered to local Indigenous artists, allowing them to tell their stories on an international stage, while also removing barriers that exist within the music industry.

Opportunity Area 31: Work with Indigenous Artists to Create a Music Export Program within the City, in Partnership with Alberta-wide First Nations, Metis, and Inuit Communities

Background: Edmonton currently holds the second largest Indigenous population in Canada ¹²⁰ and is home to over 6 major Indigenous administrative and political organizations, including the headquarters of the Metis Nation of Alberta and The Indigenous Artist Market Collective.¹²¹ Support for Indigenous arts in Edmonton can be identified through community events, primarily National Indigenous Peoples Day, which encompasses a week of cultural art, music and design. As the largest Indigenous population in Alberta, the musical identity and Indigenous history in Edmonton is quite extensive, representing the heritage of the city. The

¹¹⁹ European Music Exporters Exchange (2020)

¹²⁰ City of Edmonton (2017)

¹²¹ Government of Canada (2014)

music and artistic history amongst these vast populations would benefit if they were thoroughly supported and offered an opportunity by Edmonton to tell its cultural story through international showcasing. Local radio station CFWE is already supporting Indigenous success stories; however, international exposure and support for these artists and musicians is relatively limited. This is supported by survey results, where half of the artists surveyed indicated that they would like to improve their national and international contacts.

Focus: Consult with Indigenous communities to create an Indigenous Music Export Program to support the local organizations and collectives that promote Indigenous businesses and arts. Partnerships in this instance are extremely valuable, ensuring accurate representation and inclusion of the entire Indigenous community. This also ensures that artists properly represent Edmonton’s musical heritage on a global scale.

Suggested Timeline: 12-16 Months¹²²

Potential Partners: Edmonton Arts Council, Indigenous Tourism Alberta, Indigenous Artist Market Collective, Edmonton Indigenous Relations Office, Alberta Music Industry Association, CFWE, APTN.

Goals:

- Launch an Indigenous-centred music export program with the advice of local Indigenous communities.
- Establish inter-city relations amongst all Indigenous representatives, arts collectives and cultural organizations.

Outcomes:

- Greater representation and opportunity for Indigenous artists and the greater population.
- Stronger international presence for Alberta-based Indigenous artists.

¹²² This timeline is in alignment with the Manitoba Indigenous Music Export Program, which was announced and acted upon within 12 months time, once Jade Harper (export coordinator) was hired. Additional time was needed to establish program expectations.

Best Practice Case Study - Manitoba Indigenous North/Music Export Program¹²³

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

Who Is Responsible: Manitoba Music and Government of Canada.

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

In Their Own Words: “I understand how important it is for us as Indigenous peoples to express our truth in our own way and I am honored to walk with Indigenous artists and companies as they lead the way in cultural reclamation and revitalization.” (Jade Harper - Export Program Coordinator).

Relevance: Alberta has a commitment to First Nations, Metis and Inuit populations; however, supports for external music exposure are scarce and create barriers for upcoming and developing artists. The inclusivity of Alberta’s music ecosystem must not only incorporate Indigenous art and culture, but must also prioritize it. Doing so will diversify the talent pool within the province and create better relations amongst all music communities.

Why Does It Matter to Alberta ?

The province of Alberta has already made substantial progress with its music ecosystem functions and operations. Overall, ‘music city’ is not a term commonly used to describe the regions within the province, but without doubt, many of the systems needed to become a ‘successful music city’ are already in early development. Whether the province knows it or not, Alberta’s cities are already music cities. There are already signs of leadership and bold action throughout the province. If we are talking about music education excellence or the creation of Bell Studio National Music Centre, there are milestones that many cities around the world aspire to reach.

The recommendations offered in this report serve as a guide for how a music city functions at a high level, but it does not mean Alberta is not already doing so. These actionable items are offered as ‘further steps’, not a ‘starting point’. The purpose of the supporting best case examples are strategically used to show the potential outcomes of each actionable item. Recognizing that local governments and audience engagement becomes an integral part of

¹²³ Manitoba Music (2020)

future strategies is essential as well. This matters simply because Alberta’s music ecosystem matters. The contributions made to the social and economic value in Calgary and Edmonton, for example, are notably large. There is little doubt, especially now, that music adds value to the province of Alberta. However, future successes will require more engagement, more support, and an overall acknowledgment of what music is capable of.

Moving forward, Alberta will need to remove the idea that they are not a music place, because they are. If anything, the province is the definition of a resilient music community, given the barriers that have been presented. Music always finds a way to add value to our lives, and once we come to recognize this, we begin to care for it in a different way. This is where Alberta is at now: a province that has recognized the value of music, with a group of advocates and music champions ready to fully activate its potential. This is a time of opportunity and diversification, and there is no better time than now to take action.

OPPORTUNITY AREA TIMELINE

We recognize that not all opportunities can be delivered at once. Some will require long-term partnerships, external support and funding, yet some can begin today. Therefore, we have separated the opportunity areas into four timelines. **Now** (1-12 months), **Next** (12-16 months) **Soon** (12-24 months) and **Later** (24 - 48 months). As the opportunity areas that can be realized ‘now’ are actioned, their implementation will create a wider engagement base to deliver on the opportunity areas marked ‘soon’ and ‘later’.

PROVINCIAL

NOW (1-12 months)	NEXT (12 -16 Months)	SOON (12-24 Months)	LATER (24-48 Months)
<p>Opportunity Area 15: Implement and Distribute a ‘Fair Pay’ Program to Properly Compensate Artists</p> <p>Opportunity Area 16: Facilitate Permitting and Temporary Activation of Empty Buildings and Spaces to Create Cultural</p>	<p>Opportunity Area 6: Partner with Marginalized Groups to Identify their Specific Music Needs, Including Women and Diverse Cultural Groups, and Work Together to Develop Routine Career Support Programs</p>	<p>Opportunity Area 1: Position West Anthem as the Music Advisory Council Representing Alberta’s Music Sector</p> <p>Opportunity Area 2: Create Routine All-Ages Events and Venues</p> <p>Opportunity Area 5: Work with LGBTQ2+</p>	<p>Opportunity Area 17: Facilitate Long-Term Creation of Music Spaces (Education, Rehearsal, Recording and Performing) through Incentives to Developers of New Projects and to Redevelopers of Existing Buildings</p>

Offerings for Youth and Artists

Opportunity Area 20:

Create a “This Is Alberta” Playlist on Streaming Channels, Promoted through Tourism Departments

Communities to Increase the Overall Opportunities through Music Diversity Groups, Events, and Mentorship Programs

Opportunity Area 9:

Work with Indigenous Communities to Integrate Indigenous Music Education Programs into Provincial Curriculum, in Alignment with the Teacher Quality Standard #5 (Applying Foundational Knowledge about First Nations, Métis, and Inuit)

Opportunity Area 12:

Provide Musicians with Development and Education Opportunities Surrounding Modern Career Development

Opportunity Area 13:

Organize and Implement a Long-Term Artist Program (12 months) that Provides Developing Artists with Professional Experiences, Educating Musicians on Career Development and Sustainability through a Practical Process

Opportunity Area 14:

Offer a Music Entrepreneur Program to Support Developing Artists, Further

Opportunity Area 21:

Offset the Costs of Booking International Artists by Drawing in Musicians to Record in Alberta through a Reimbursement Program

Opportunity Area 25:

Organize the Creation of a Night-time Operations Office and Advisory Board

Opportunity Area 28:

Establish a Stronger Local Music Export Offering, Including Increased Export-Ready Programming and Enhanced Promotions

		<p>Harnessing and Supporting the Already Established Entrepreneurial Community within each City Across Alberta</p> <p>Opportunity Area 22: Fully Integrate Music Tourism into Tourism Strategies and Offerings, Making It a Focal Point of Attraction through a Strategy or Action Plan</p>	
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CALGARY

NOW (1-12 months)	NEXT (12 -16 Months)	SOON (12-24 Months)	LATER (24-48 Months)
<p>Opportunity Area 18: Utilize Multi-Purpose Facilities and Dormant Spaces Outside of the Downtown Core, whether by Establishing Music Venues or Temporarily Activating Spaces for Culture- focused Events</p> <p>Opportunity Area 23: Engage in Global Music City Conferences and Events</p>	<p>Opportunity Area 29: Host Music Export Seminars and Fairs</p> <p>Opportunity Area 30: Further Expand and Build upon the Roots of the SoundOff Summit</p>	<p>Opportunity Area 10: Establish a Music Therapy Education Program that Provides Certifications or Credentials</p>	<p>Opportunity Area 3: Late-night Transit Programs</p> <p>Opportunity Area 26: Develop an After-Hours Venue Permit with Regulated Late-Night Venues</p>

EDMONTON

NOW (1-12 months)	NEXT (12 -16 Months)	SOON (12-24 Months)	LATER (24-48 Months)
<p>Opportunity Area 4: Edmonton Busking Guidelines</p> <p>Opportunity Area 8: Encourage Engagement in Musical Events, Performances and Showcases through Transportation Reward Programs</p> <p>Opportunity Area 19: Maximize Music Spaces throughout the City by Hosting Daytime Music Events and Shows, with a Particular Focus on the ICE District</p>	<p>Opportunity Area 7: Strategically Coordinate Festival Events, Dates and Plans, Allowing for More Engagement throughout the Year, Avoiding an Over Cluster of Offerings</p> <p>Opportunity Area 24: Engage the Music Industry in Edmonton’s Tourism Offerings and Expand Genre Promotion</p> <p>Opportunity Area 27: Organize and Promote Evening and Late-night Transit Safety Strategies to Work in Conjunction with the Late-Night Transit Service</p> <p>Opportunity Area 31: Work with Indigenous Artists to Create a Music Export Program in the Region</p>	<p>Opportunity Area 11: Initiate a Program Focused on Musical Scoring (Film, Television, and Gaming)</p>	<div style="background-color: #cccccc; height: 100%;"></div>

8. Activation of a Music Vision

The most effective means for maximizing a music ecosystem is to understand how it fits within the current structures and functionality of a city. Determining the desired outcome helps to concentrate on gaps and systems that can work in conjunction with music-friendly policies. This study was guided by the West Anthem Music Vision, focusing on several key areas. This includes making music accessible to everyone, creating strong musical experiences, attracting talent, building community, creating the right infrastructure, and harnessing musical identity.

Asset mapping was conducted to uncover how and where musical experiences are being offered to locals and tourists. Meanwhile, recommendations provide insight into how to attract or maintain talent, create inclusive and diverse music communities, and effectively harness the musical heritage of the province. Perhaps the most valuable assessment was the analysis of government action, or inaction, in regard to music infrastructures, which was conducted within every stage of this study (literature reviews, survey, roundtables, recommendations). Without government participation the functionality of a music ecosystem becomes incomplete. To support the music industry from the top-down, a particular focus was placed on recommendations that serve the overarching functions of a thriving music sector.

As Calgary, Edmonton and Alberta continue forward with this vision, it is important to recognize that all the needs of the music ecosystem will evolve into more expensive and detail-orientated action. The process of completing a music vision is about longevity, growth and consistent adaptation. A willingness to adjust to these changes will ensure that the province as a whole can become a strong music destination. More important is that the province must reciprocate the value that music brings, investing in music as much as it gives to those who enjoy it.

9. Conclusion

Some of these recommendations are large and bold, while some of them are simple, yet small adjustments that are frequently overlooked. All, however, can be used to enhance everything music-related in Alberta. Once activated, Alberta will establish Calgary and Edmonton as high-functioning music cities. This will only be possible by tapping into the many passionate artists, organizations, and advocates that are fully invested in the music and arts sector across the province. Music Mile and The Calgary Municipal Land Corporation, for example, have positioned music entertainment as a primary function in the eastern regions of downtown Calgary. Similar examples can be found in Edmonton with One Properties Group, responsible for developing the state-of-the-art Rogers Arena.

Without question, music is prevalent within Alberta's major cities. A clear commitment to harnessing music can be found in the plethora of educational offerings, the establishment of Calgary's own National Music Centre, and the development of Edmonton's ICE District,

amongst many others. These assets separate Calgary and Edmonton from many other music cities across Canada. However, in order to optimize these unique assets and match the ambitions of this project, Alberta must look to build partnerships and maintain a clear channel for communication and collaboration. Each recommendation or strategic opportunity is derived from the input of the broader music ecosystem, and although these appear as individual actions, they all work in conjunction with one another. It is important to recognize the need to develop and grow alongside these recommendations, drawing upon the voices and needs of those who fuel our music industry – artists and music professionals. Commitment and a willingness to adapt are synonymous with positive music city outcomes. The current support for music is unquestionably admirable within Alberta, though, there are still many unmet needs. Government participation, engagement with music communities, and equitable opportunities are perhaps the most critical areas that require immediate action. These actions may seem large, but these initiatives will form organically once a few programs and policies are initiated.

Starting right now is the most valuable of all actions, and in time, Alberta will prove that it is not just a music-rich province, it is also a national leader in music opportunity. Soon after, the positive results will reveal themselves.

APPENDIX

The material included in the appendix, for those who wish to explore this study further, is as follows:

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

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