



SOUND
DIPLOMACY

GREATER MADISON MUSIC CITY

MUSIC RECOVERY FRAMEWORK

Presented by Sound Diplomacy and the
Greater Madison Music City Project

Executive Summary | August 2022



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INTRODUCTION

SOUND DIPLOMACY

Dear Greater Madison Music City,
It has been a privilege to partner with you on this report, which is the next phase of a multi-phased process to create a more equitable music ecosystem in Greater Madison.

This all started in 2018 with the publication of the landmark **Taskforce on Equity in Music and Entertainment**. Its recommendations created an initial roadmap to ensure that all musicians, no matter where they lived or who they were in Greater Madison, were supported and encouraged to pursue music and that all music, no matter its genre or discipline, was treated fairly.

This report you have is a follow-on from that report, which demonstrates not only the economic value of music in Greater Madison, but also the inherent value it can continue to bring if we continue to work to improve policy, foster relationships and treat music – in all its forms and functions – as an ecosystem.

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

Shain Shapiro,
Founder and Chairman,
Sound Diplomacy

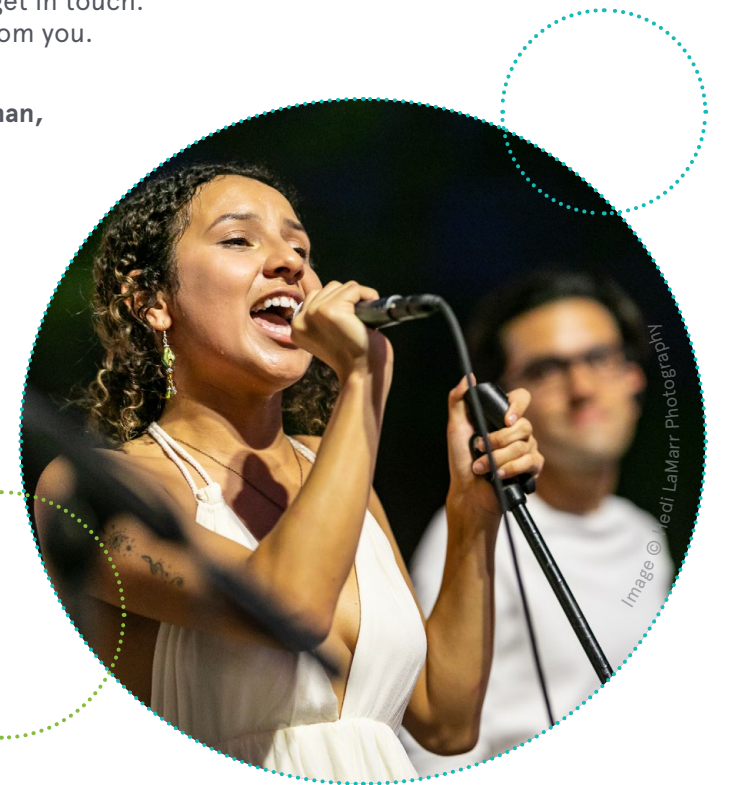


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1.1 ABOUT THE PROJECT

PROJECT DESCRIPTION

Sound Diplomacy was engaged by The Greater Madison Music City Project to develop a music recovery framework to determine how Madison can build equity in the music industry and guide sustainable tourism and recovery efforts inclusively across all communities and demographics.

The impacts of the COVID-19 pandemic world-wide led to significant global changes that impacted local economies and their music ecosystems. When music was paused in response to the pandemic, communities, like Madison, gained a new perspective on the value of music not just on the economy, but also on the social connectivity, tourism potential and cultural development of a community.

As a response to this new shift in perspective of communities everywhere, Sound Diplomacy published its Music Cities Resilience Handbook which has helped us make a case for music as a driver for economic resilience and equity, converting relief into long-term investment, and all-encompassing support – so music becomes a more economically, socially and culturally impactful sector in cities like Madison and all over the world.

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

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

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



1.2 METHODOLOGY

ECONOMIC IMPACT ASSESSMENT

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

WORK GROUP ROUNDTABLE DISCUSSIONS AND SWOT ASSESSMENT

The Greater Madison Music City Project conducted four work group roundtable discussions with members of the music ecosystem to assess the current state of Madison’s music ecosystem from the point of view of its participants. This then enabled a SWOT analysis to be compiled with the strengths and weaknesses of Madison’s music ecosystem and its potential opportunities and threats.

REGULATORY ASSESSMENT AND COMPARATIVE ANALYSIS

Comprehensive desk research including a literature review and an in-depth regulatory assessment to gain an understanding of current policy and regulations. In addition, a comparative analysis was created to show the best practices in the cities of Austin, Boise and Eugene.

MAPPING

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

ACTION PLAN

A comprehensive plan for the development of Madison’s music ecosystem based on the analytical work previously completed. This action plan takes the form of recommendations with goals, implementation strategies, and case study examples. The action plan includes timeline suggestions for how long each recommendation may take to implement.

2. MADISON AT A GLANCE REGULATORY ASSESSMENT

TOPIC	IN PLACE?	CITY'S POLICY	BEST CASE
MUSIC EDUCATION	Yes	<p>The Madison Metropolitan School District (MMSD) adheres to the Wisconsin Music Educators Association and Wisconsin Standards for Music in their instructional processes.¹ In 2022 MMSD devoted 1.3 million in Elementary and Secondary School Emergency Relief (ESSER) funds towards a Summer Arts Academy² and gave out instruments to children. MMSD, City of Madison, UW Arts Collaboratory, Overture Center for the Arts, Arts for All, & the Madison Children's Museum all actively participate in Any Given Child Madison, a collective impact project started by the Kennedy Center that works to strengthen arts education in the schools.³</p> <p>Other youth-oriented arts education programs include UW-Madison's Summer Arts Clinic,⁴ The Wisconsin Youth Symphony Orchestra⁵ (which includes Madison Music Makers,⁶ a program that provides instruction and performance opportunities regardless of students ability to pay), Madison Youth Choirs,⁷ and the Madison Youth Arts Center (MyArts),⁸ Music con Brio,⁹ Dane County and Girls Club.¹⁰</p> <p>College Music programs are offered at the Mead Witter School of Music at UW-Madison,¹¹ Madison Area Technical College,¹² and Edgewood College.¹³</p> <p>Further courses, professional development, and networking programs are offered through the University of Wisconsin-Madison's Professional Learning and Community Engagement (PLACE) program,¹⁴ the Arts + Literature Lab,¹⁵ the Urban Community Arts Network,¹⁶ Teen Bubbler,¹⁷ and the Communication program,¹⁸ and the Wilder Deitz School for Creative Music.¹⁹</p>	<p>Nashville's Music Makes Us initiative is a partnership with Metro Nashville Public Schools, the Mayor's Office and the Nashville music community. The program's main goal is to eliminate barriers to music education and increase student participation while adding a contemporary curriculum that embraces new technologies and reflects the diverse student population.²⁰</p>
GRANTS ²¹	Yes	<p>Madison Arts Commission annual grants program includes: Project Grants, Art Education Grants, Legacy Grants, Individual Artist Fellowship Awards, Art in Public Places and BLINK. These fund art programs for students, permanent and temporary public art projects, individual artists and performers, and nonprofits.²²</p> <p>Dane Arts, the county's arts and cultural affairs commission, has a grant program which supports arts, culture, and local historical activity in Dane County. There are two grant cycles per year which distribute several hundred thousand dollars from local public and private sources over 150 awards with project, short order project and capital grants.²³</p> <p>The Wisconsin Arts Board also offers several grants including: Creation and Presentation grant, Creative Communities grant, Woodland Indian Arts Initiative, Arts Challenge Initiative, Wisconsin Regranting Initiative, Folk Arts Apprenticeship Program.²⁴</p> <p>Annual grants are subject to City and County budgetary allocations.</p>	<p>While there are several best-case examples of arts and culture grants, Creative Victoria, in Australia, has created a music-specific funding programme which issues grants to music venues to help them in making structural changes to contain sound and prevent complaints that could lead to closures. The fund is aimed at helping with minor soundproofing changes that will prevent venues from having to make major structural adjustments. Grants can be used to source professional acoustic advice, install double-glazing, purchase sound-absorbing furnishings and install technology that ensures high quality sound at lower volumes.</p> <p>Because the mapping assessment shows that Madison has a lack of dedicated music venues, a program like this could help to optimize performance opportunities.²⁵</p>

TOPIC	IN PLACE?	CITY'S POLICY	BEST CASE
BUSINESS INCENTIVES ²⁶	No	<p>The Small Business Equity and Recovery (SBER) grant provides support to small businesses owned by people of color in recognition of the systemic inequities faced by such populations.²⁷ As of February 2021, the grant is no longer accepting applications.</p>	<p>Oregon has designed itself as a hub for small and medium businesses due to the tax considerations they make.²⁸ The two major tax breaks for these businesses are the Oregon Investment Advantage and the Oregon New Market Tax Credit. Businesses that hire small numbers of employees are able to almost completely eliminate state business income tax liability for 8 years, allowing them to put money back into their company with the help of the Oregon Investment Advantage. In a bid to get businesses to invest in low-income communities, the Oregon New Market Tax Credit gives a 39% tax credit of the total amount invested across a 7 year period back to the company.</p>
LIQUOR LICENSING ²⁹	Yes	<p>Alcohol licenses are approved by the City of Madison's Alcohol Review License Committee. Alcohol license classifications include: Class A – allows the sale of alcohol for consumption elsewhere than on the premises where sold; Class B – allows the sale of alcohol for consumption either on or off the premises where sold; and Class C – allows the sale of alcohol for consumption on the premises where sold and limited sales for off-premises consumption.</p> <p>The legal drinking age is 21. Retail alcohol sales are prohibited between 9pm-6am for hard liquor and 12am-6am for beer. Beverage alcohol sales are prohibited between 2am-6am Mon-Fri and 2:30am-6am Sat-Sun (no closing required on New Years Eve).³⁰ However, they can remain open for 30min after sales cease.</p>	<p>The Department of Liquor and Lottery, Division of Liquor Control (DLC) in Vermont has on its website a plain-language guide and description of the liquor licenses available for applicants, including the necessary steps to obtain one.³¹ A certified employee in a business with a First Class License is able to train employees on the rules and regulations related to selling/ serving alcohol by using the DLC in-house training kit, which eliminates the additional training expenses and requirements on workers of licensed premises.³²</p>
SPECIAL EVENTS PERMIT ³³	Yes	<p>Special events permits are dispersed by the city and include downtown performance space, neighborhood block parties, rallies and marches, park events, street use events, and filming and photoshoots.³⁴</p> <p>In July 2022, the Madison Arts Commission published their Outdoor Music Guide (OMG) which provides information on what musicians and event organizers "can successfully do outdoors to deliver music-related activities within the City of Madison."³⁵</p>	<p>Seattle's Special Events Office has its own website with extensive guidelines on how to apply and what to expect when requesting a Special Event Permit. The main website for the Special Events Office includes clear application instructions in its online forms, Public Safety requirements, a calendar of approved events and a Special Event Handbook to refer to. Forms attached include the actual permit application (including templates and instructions), a permit fee estimator (administrative fees start at \$275 per permit) and an online handbook.³⁶</p>
NOISE AND CURFEWS	Yes	<p>According to the Madison Arts Commission's Outdoor Music Guide, "The City allows amplified sound (voice, instruments, and recordings) from a street or sidewalk during the following hours in most parts of the City without a permit: 12pm to 1:30pm and 5pm to 7pm, daily. However, that does not apply to areas along State Street or Rotary Plaza in front of the Children's Museum."³⁷</p> <p>In order to have amplified sound outdoors outside of these times, performers and/or event organizers must obtain permission from the City.</p>	<p>Nashville has separate codes for businesses operating within their Downtown Code district (DTC). Instead of restricting sound amplification by the time of day, Nashville's DTC is restricted by their business operating hours. While commercialized use of sound-emitting machinery is restricted to 70 decibels for businesses operating outside of the DTC from 9pm to 6am, businesses within this district are allotted up to 85 decibels for prerecorded interior amplified sound during their business hours.³⁸</p>

TOPIC	IN PLACE?	CITY'S POLICY	BEST CASE
HEALTH AND SAFETY REGULATIONS ³⁸	No	Public safety in Madison is managed by the Fire Department, Police Department and the city's Emergency Management Office which is located within the Fire Department. ⁴⁰ Public Health Madison & Dane County has guidance for workplaces and businesses on their website. There are no sector-specific regulations.	London's Women's Safety Charter sets out guidance for venues, operators, charities, councils and businesses to improve safety at night for women. This includes better training of staff, encouraging the reporting of harassment, and ensuring public spaces are safe. ⁴¹
ENVIRONMENTAL SUSTAINABILITY ⁴²	Yes	Dane County Office of Energy and Climate Change is a division within the County Executive's Office. The office uses its Climate Action Plan as a guide and strategy to reduce greenhouse gas emissions and address climate change by leading public and private efforts across the county and implementing strategies. ⁴³ The Arts, Design and Culture sustainability category states that art, design and culture play vital roles in maintaining high quality of life and so should be an integral part of creating sustainable solutions for achieving civic goals.	Melbourne, Australia's Planning and Environment Act encourages decision makers to consider the environmental impact of proposed development projects. Environmental considerations include music noise and the social and economic benefits of live music and cultural events. ⁴⁴
BUSKING ⁴⁵	No	There is no official busking policy in place in Madison. Street performers who do not use public electricity for amplification are not required to be licensed and are generally allowed to play whenever and wherever as long as they do not receive complaints or obstruct the right of way. The only other specification is that buskers cannot assume a site issued to a City licensed vendor. They can play there if the vendor is not in their vending site but not when it is occupied by the vendor. This includes food carts, arts & crafts, merchant vending, and sidewalk/roadway cafes. ⁴⁶	The Asheville Busking Guide was created by Asheville Buskers Collective to provide buskers and potential buskers with the dos and don'ts of the practice. It includes specific definitions for noise disturbances and includes city rules and laws. ⁴⁷
REGULATIONS FOR OUTDOOR ADVERTISING	Yes	For special events at parks, approved events can be promoted via poster kiosks at Capitol Square and State Street. ⁴⁸ There are also transit advertising opportunities for businesses. ⁴⁹	The City of Vancouver's Transit Shelter Advertising Program offers free access to transit shelter advertising space for non-profit arts and culture organizations. The organizations pay for and arrange the posters and the City of Vancouver's Cultural Services Department provides them with space at transit shelters allotted by Outfront Media. ⁵⁰
AUDIENCE DEVELOPMENT ⁵¹	Yes	The City of Madison's 2013 Performing Arts Study assessed the performing arts environment including existing and potential audiences. The dashboard tool allows performing arts organizations to gain insights into audience development and marketing through extensive data on performing arts attendees characteristics and demographics. ⁵² PBS Wisconsin hosts a 30-Minute Music Hour as a way to showcase the state's independent artists. ⁵³	Night Out ⁵⁴ is an Arts Council of Wales (ACW) initiative that helps local organizations to bring professional performances into community buildings at subsidized prices. This initiative helps hundreds of community groups across Wales to bring the arts to the heart of their communities by selecting and hosting professional performing arts events in non-traditional smaller-scale venues (mostly village halls and community centers).

TOPIC	IN PLACE?	CITY'S POLICY	BEST CASE
MUSIC OFFICE	No	While Madison does not have a dedicated Music Office as part of local government, the Greater Madison Music City project advocates on behalf of local musicians and music businesses, particularly in regards to racial equity and access ⁵⁵ and the City of Madison neighborhood planner has been given a 20% staffing assignment to work on Greater Madison Music City Projects. ⁵⁶ In addition, the City of Madison's Arts Program Administrator works diligently to serve as a voice for the Greater Madison creative community, develop programs that speak to their needs, and advocate on their behalf.	Nashville's Music City Music Council is a collaboration between the Mayor's Office, Chamber of Commerce and Convention & Visitors Corp. Its focus is economic development, working to expand local business while attracting new businesses. ⁵⁷
ENTERTAINMENT DISTRICTS POLICY	Yes	Madison Central Business Improvement District (BID) self-identifies as the city's entertainment district. The BID is a concentration of shopping, dining and entertainment experiences including art galleries, museums, libraries, arts centers and the University of Wisconsin. The BID is also home to multiple events, festivals, markets, concerts and walks. ⁵⁸ BID funds are used for marketing the district, business recruitment and retention, and enhancements like downtown art, holiday lights, flower planters, an Ambassador program and a Downtown Map & Guide.	Austin has six official entertainment districts, each distinct in aesthetic and offer. Downtown Austin is the main commercial area, divided into three sub-areas (2nd Street, Warehouse District, and West Sixth Street) and concentrating a higher profile of entertainment and dining options compared to the rest of the districts. East Austin is the fastest growing neighborhood, famous for its eclectic and alternative offer of entertainment, food options, and bars. ⁵⁹
AGENT OF CHANGE	No	The City of Madison has no Agent of Change policy in place. The Agent of Change Principle holds the entity that creates a change in an area responsible for the impact this change can have in that area.	San Francisco Mayor, London Breed's amendment to Chapter 116 of the local ordinances states existing venues, so long as they are in keeping with existing noise laws, are protected from the complaints of any new residences, hotels or motels built nearby. ⁶⁰
PARKING REGULATIONS ⁶¹	Yes	The City offers temporary "no parking" signs at discounted rates to venues in order to accommodate large moving trucks or oversized vehicles. ⁶²	In Nashville , a deal was brokered between Premier Parking and the local musicians' union, in which special \$5 nightly rates will be offered for musicians. Additionally, the Renaissance Hotel in the city center has started offering \$9 valet parking services for musicians. Parking vouchers for the hotel are handed out in local music venues, intended to be given to musicians to access those prices. ⁶³
TRANSIT ⁶⁴	Yes	Dane County Regional Airport is six miles northeast of downtown Madison. The proximity means that it can be easily accessed by taxi or Madison metro bus. ⁶⁵ Madison's Metro Transit bus system has 47 routes with primary routes operating from 6am-11:30pm every day and campus routes operating till 3am. ⁶⁶ The city is working to implement a Bus Rapid Transit system with construction expected to begin in 2023. ⁶⁷ Improvements are expected to improve riding experiences and reduce travel time by up to 25%. ⁶⁸ Nearly 120,000 jobs are located within a 10-minute walk of the planned system.	Toronto's Blue Night Network is the most extensive nighttime transit service in North America, with routes picking up after trains cease service between 1am-2am. Routes run approximately every 30 minutes until morning service resumes, and are spaced in order to keep 99% of the city within a 15 minute walk of a stop. ⁶⁹

3. ECONOMIC IMPACT ASSESSMENT



MADISON ECONOMIC IMPACT OVERVIEW

The music ecosystem consists of the Artistic & Creative⁷⁰ and Professional & Supporting⁷¹ segments. In Dane County for 2018, the local music ecosystem generated and supported a total of 5,791 jobs, an output of \$636 million,⁷² a total GVA of \$428 million. The total compensation of the music ecosystem workers was \$218 million.

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

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

DEFINITIONS

The **direct impact** is the economic activity directly connected to the music ecosystem, such as musicians, agents and venues. The **indirect impact** is supportive activity of the suppliers of the music ecosystem and is related to local businesses that provide goods and services, such as advertising, transportation and legal affairs. **Induced impact** is created when the workers of the whole music ecosystem spend their wages on food, transportation, entertainment, etc. in their daily life.

TYPE OF IMPACT	EMPLOYMENT (NUMBER OF JOBS)	OUTPUT (MILLION \$)	GROSS VALUE ADDED (MILLION \$)	EARNINGS OR COMPENSATION (MILLION \$)
Direct	3,961	415	292	144
Indirect	660	86	53	30
Induced	1,170	136	83	44
Total Impact	5,791	636	428	218

Developed by: Sound Diplomacy



Image © Memory

DIRECT IMPACT

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

DANE COUNTY MUSIC ECOSYSTEM ECONOMIC IMPACT, OUTPUT, COMPENSATION, GVA (MILLION USD) AND EMPLOYMENT 2018

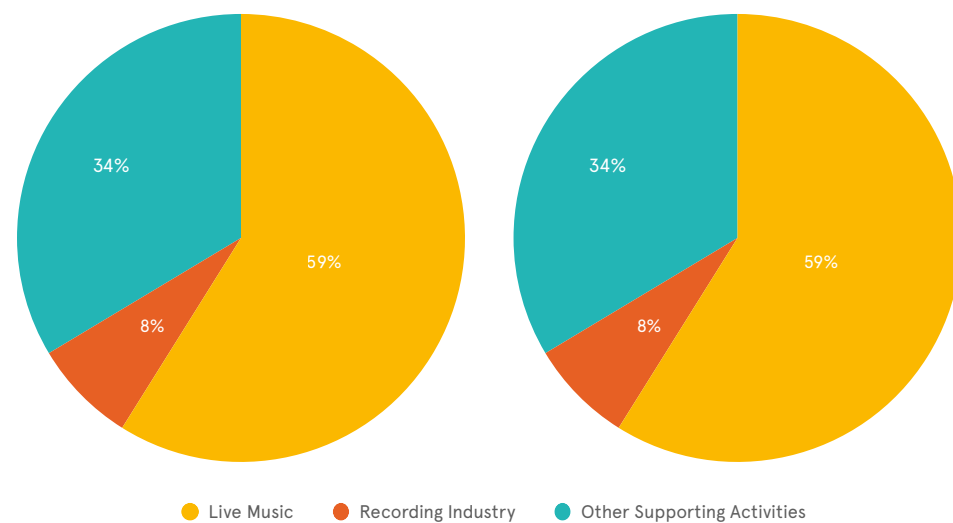


Source: County Business Patterns 2018, BEA RIMS II, Sound Diplomacy Research
Developed by: Sound Diplomacy

Madison's economic contribution to Dane County's music ecosystem is the largest with:

- 84% (3,340)** of the County's music ecosystem **employment**
- 82% (\$341 million)** of the County's music ecosystem **output**
- 81.29% (\$237 million)** of the County's music ecosystem **GVA**
- 83.13% (\$120 million)** of the County's music ecosystem **compensation**

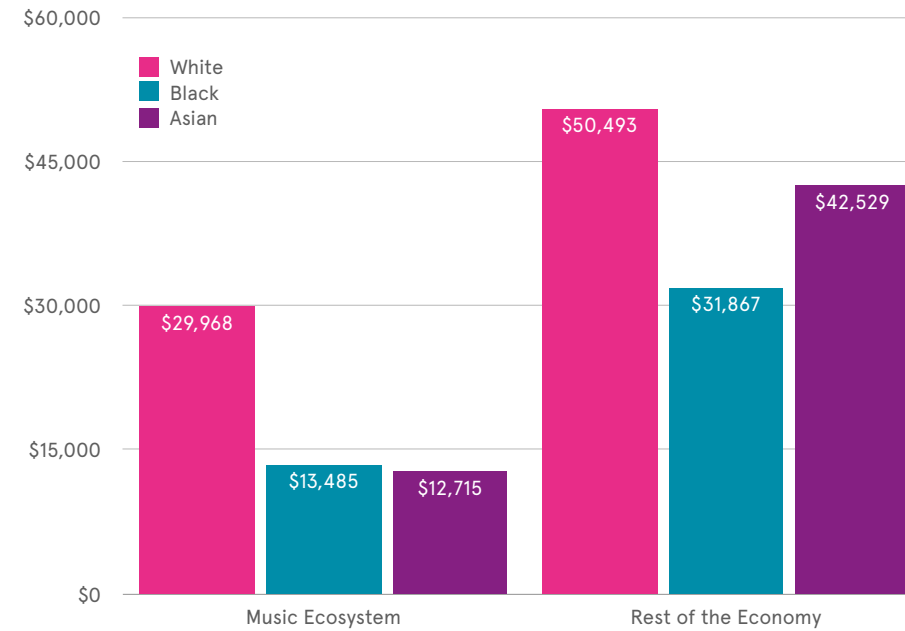
MUSIC ECOSYSTEM DIRECT EMPLOYMENT & OUTPUT BY SEGMENT 2018



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

Music Ecosystem: Average Annual Income

ANNUAL AVERAGE INCOME BY RACE



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

In the music ecosystem **White-identified workers earn 122% more than Black/African Americans and 136% more than Asian workers**. In the rest of the economy White workers earn 58% more than Black/African Americans and 19% more than Asian workers.

This gap can be further explained by the differences in access to higher-paid positions (e.g. managerial) where within the **music ecosystem**, most of the **managers are White (70.8%)**.

There is an indication⁷³ that artists and creatives with a Hispanic or Latino/a/x background have a lower percentage of their income derived from artistic or creative sources. On average, 48% of their income comes from sources not related to the music field, whilst for the non-Hispanic or Latino/a/x artists and creatives, it is 35%.

Of the **total direct employment** created by the music ecosystem, **75% (2,968)** exists in the **Professional & Supporting segment**, while **25% (993)** exists in the **Artistic & Creative segment**.

Within the Professional & Supporting Segment, **Live Music is the main contributor of jobs to the segment, generating around 59%** while the Other Supporting Activities generates 34% of jobs and the Recording Industry only 7% of jobs in the segment. **The Live Music sub-segment requires more employees to provide its services** (bartenders, roadies, promoters, logistics, etc), while the **Recording Industry sub-segment needs fewer employees and more capital investment to provide its services, generating a bigger output**.

INDIRECT IMPACT

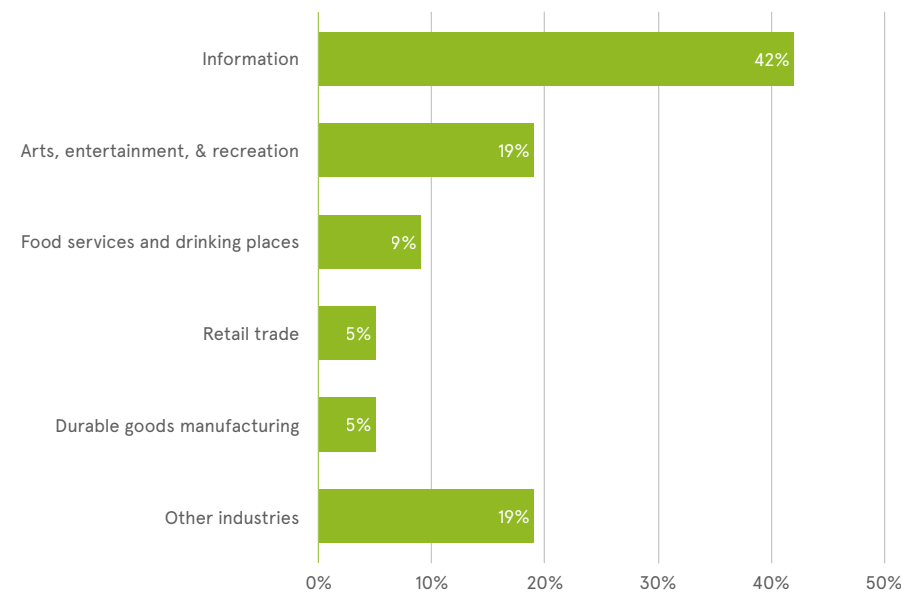
In 2018, the **indirect economic impact** of the music ecosystem in Dane County reached an output of \$86 million, a GVA of \$53 million, indirect earnings (compensation) of \$30 million, and 660 jobs in Dane County indirectly supported.

Madison concentrates around 83% of the indirect effect generated by the music ecosystem in the County.

42% (\$36 million) of the **indirect output** effect of Dane's music ecosystem impacted the **information sector**, 18.98% (\$16.3 million) impacted the **arts and entertainment sector**, 9.45% (\$8.10 million) impacted **food services and drinking places**, 5.46% (\$5.09 million) impacted the **retail trade sector**, among other industries.

36% (240 jobs) of the indirect jobs belonged to the **information sector**, 30% (195 jobs) to the **arts, entertainment, and recreation sector**, and 9% (58 jobs) to the **food and services sector**, among other sectors.

INDIRECT IMPACT OUTPUT BREAKDOWN, 2018



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



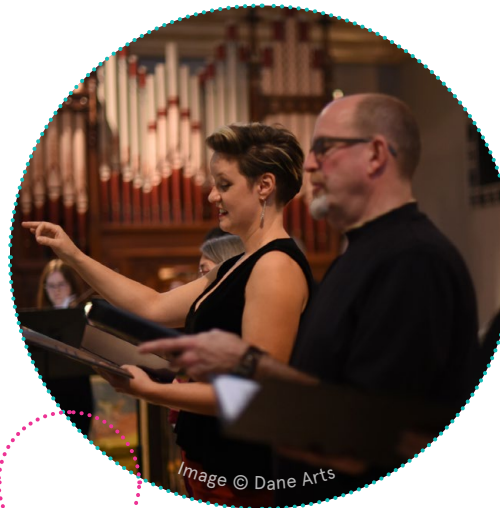
INDUCED IMPACT

The induced output of the music ecosystem in the region reached \$136 million, a GVA of \$83 million in 2018, and supported 1,170 jobs, with a compensation of \$44 million.

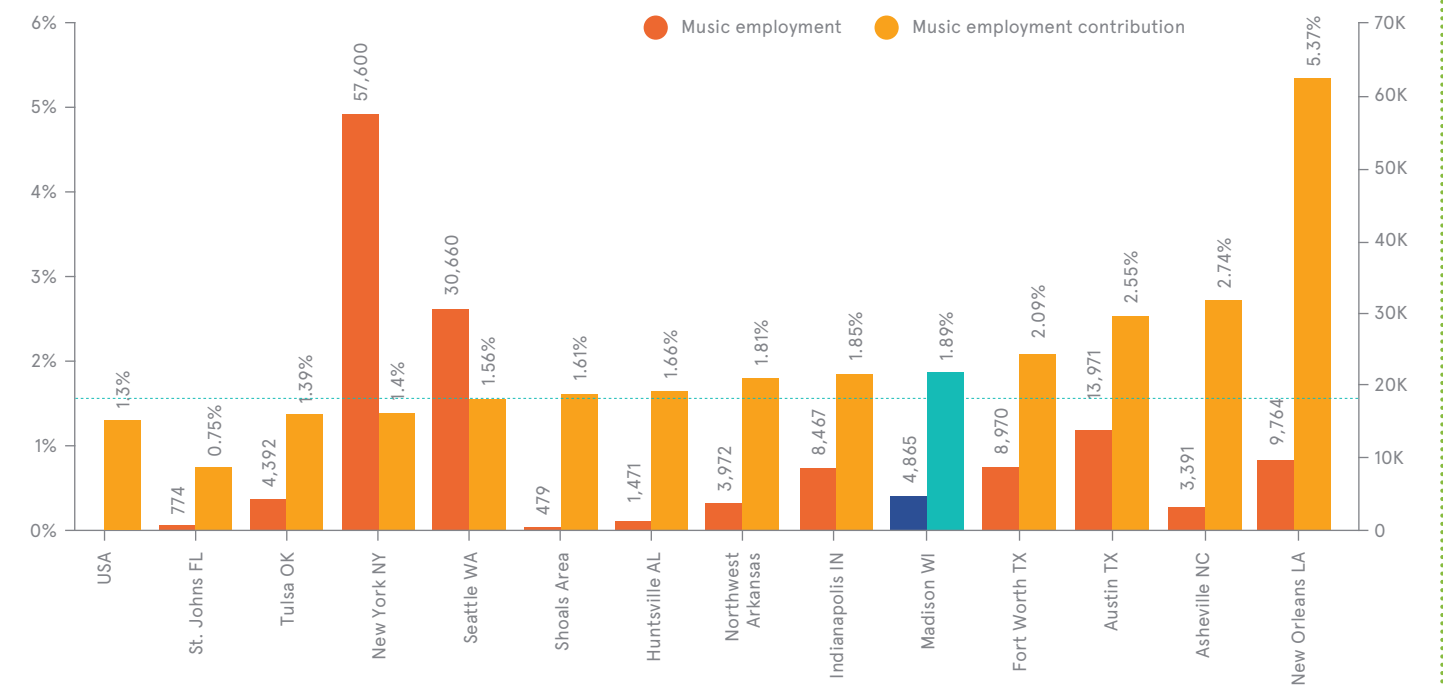
Every \$1,000 of the music ecosystem output is generating an induced effect of \$326 on different industries of the economy.

DANE COUNTY IN COMPARISON

In Madison, the music sector supports 1.89% of the city's employment, more than the national average contribution of music to national employment (1.3%).



MUSIC ECOSYSTEM TOTAL EMPLOYMENT, US CITIES



Developed by: Sound Diplomacy

4. MAPPING

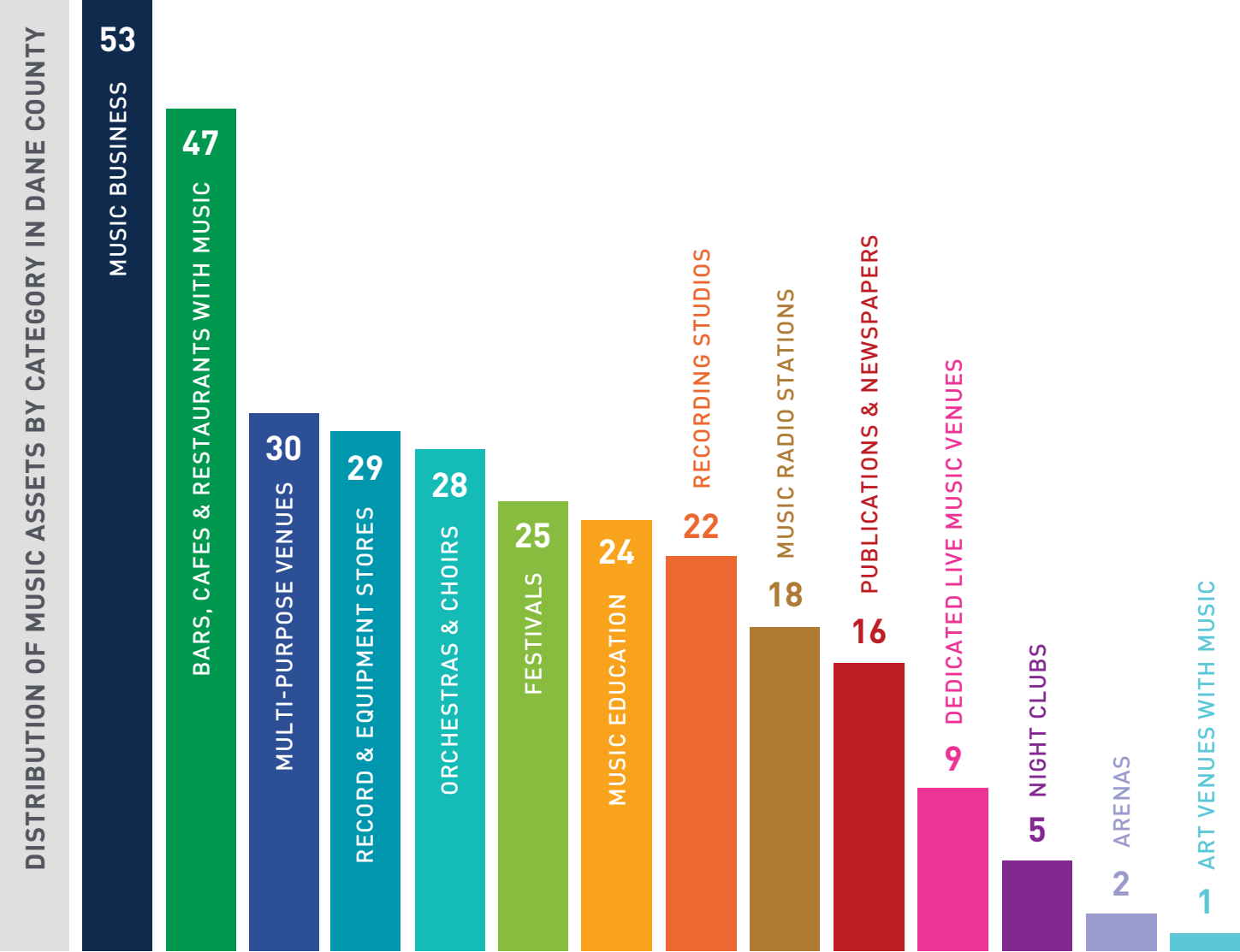


Image © Dane Arts

4.1 OVERVIEW OF MUSIC ASSETS IN DANE COUNTY & CITY OF MADISON

There are 309 music assets in Dane County. Of these assets, 236 (76%) are located in the City of Madison. The remaining 24% are located outside of the City of Madison but are in Dane County.

Music business is the category with the highest number of observations within Dane County with 53 (17%) assets mapped. There are 34 of these establishments located in the City of Madison. The second category with the most presence in the county is Bars, Cafés and Restaurants with Music, that reaches 47 (15%) assets, with 38 located in the City of Madison.



Development by Sound Diplomacy

4.2 SPATIAL DISTRIBUTION AND CLUSTERS OF MUSIC ASSETS IN THE CITY OF MADISON

The key findings from the geolocation exercise indicate that:

There are three clusters within the City of Madison:

The first is in Districts 6, 4 and 8, which is the corridor between the two lakes, with a total of 118 music assets that represents 50% of the total in the City of Madison.

The second is located in District 14, which has 17 assets concentrating 7.2% of the total assets.

The third is located in District 19 that has 16 assets that represent 6.78% of the total.

Of all music assets located in the City of Madison, 80% are concentrated in nine Aldermanic districts, where only two of the nine Aldermanic districts (Districts 4 and 6) concentrate 41% of the total assets in Madison.

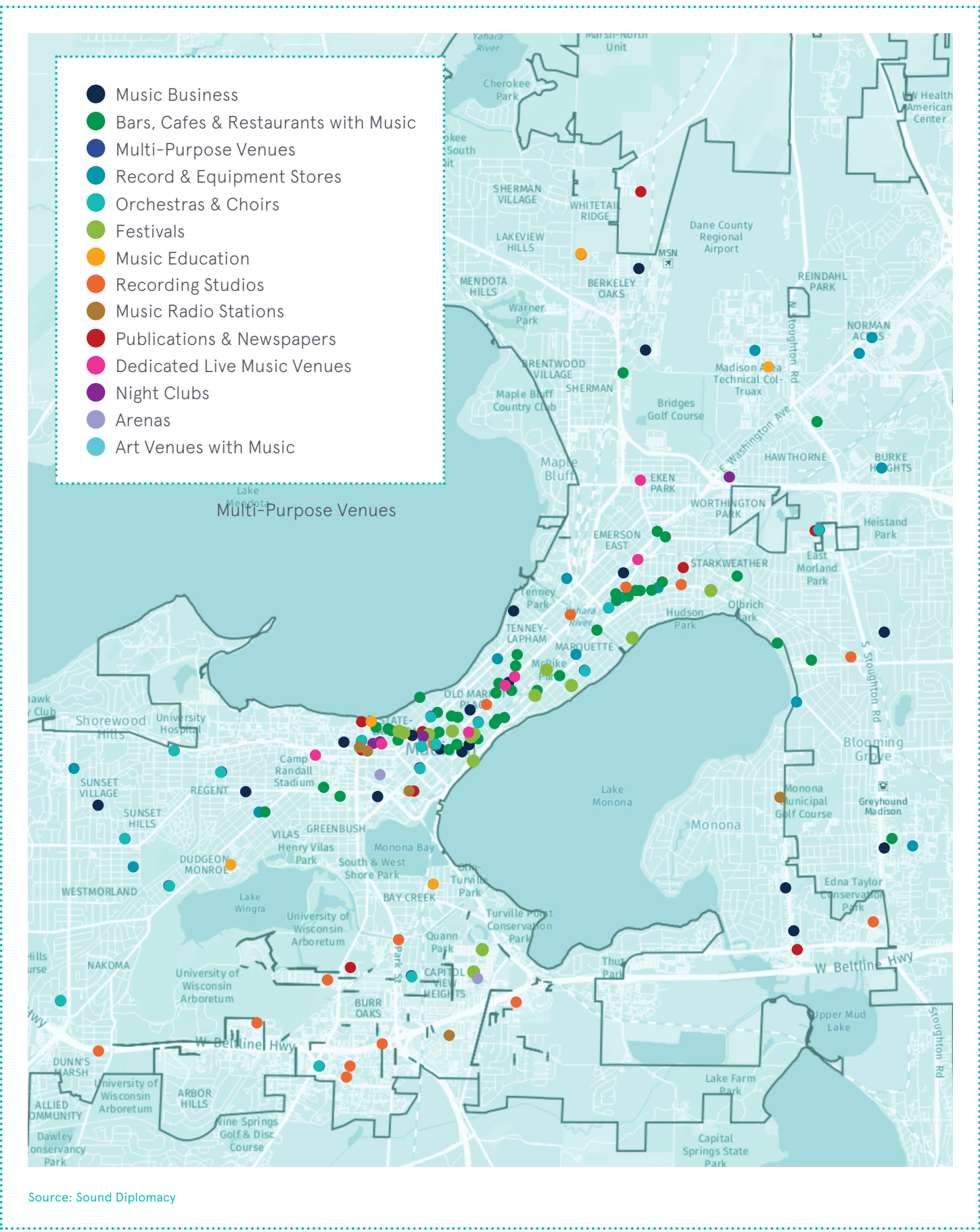
A total of 53 Music Businesses were mapped in Dane County, of which 34 are concentrated in the City of Madison. The 34 assets are made up of: Dance Companies, Publishing and Law, Music Non-Profit Organizations and Music PR.

District 8 is the third music asset concentrated district in Madison with 21 assets (8.9%).

A total of 94 venues were mapped, of which 81 are located in the City of Madison. Most of the venues in Dane County fall primarily in venues not exclusively designed for live music (Bars, Cafés and Restaurants with Music and Multipurpose Venues).



The interactive map of Music Assets in Dane county is available on this [Interactive Map tool](#).



5. SWOT ANALYSIS

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

STRENGTHS

EDUCATION

- Madison has many schools, colleges and nonprofit organizations that offer youth-oriented arts and music education programs as well as professional development programs
- The Madison Metropolitan School District adheres to the Wisconsin Standards for Music. This means that music is viewed as a central part of a holistic education and as a pathway for students to gain skills and knowledge that will help them in their academic and social pursuits and is offered at all grade levels
- UW-Madison Summer Music Clinic is one of the oldest music camps in the U.S. Badger Pre College offers 60+ classes, 840 students are served annually, 25% of program alumni go on to attend UW-Madison for college, and 20% of students receive some type of scholarship to support their participation in the program
- Wealth of young creatives (UW-Madison, Madison Area Technical College) who both create and consume music
- Community-based youth education is available and thriving throughout the city.

ZONING

- Madison’s BID self-identifies as the entertainment district with a concentration of shopping, dining and entertainment experiences including art galleries, museums, libraries, arts centers and the University of Wisconsin
- BID funds are used for marketing the district, business recruitment and retention, and enhancements like downtown art, holiday lights, flower planters, an Ambassador program and a Downtown Map & Guide.

GOVERNANCE & INFRASTRUCTURE

- Madison Arts Commission and Dane Arts offer multiple annual grants programs
- The City of Madison works to support visual public art programs e.g. State Street Murals, Utility Box art program, etc.
- Public Health Madison & Dane County has COVID-19 guidance for workplaces and businesses on their website.

ENVIRONMENTAL SUSTAINABILITY

- The Dane County Office of Energy and Climate Change has a Climate Action Plan which contains an Arts, Design and Culture sustainability category.

LICENSING & ORDINANCES

- Clear noise ordinances with specific decibel limits and different sound permits available e.g. special event permit, downtown performance permit or private noise amplification permit.
- All licensing procedures are handled by the City Clerk’s Office, which has a website dedicated to licenses and permits.

TOURISM & MARKETING

- Destination Madison has a regularly updated calendar of arts and cultural events
- PBS Wisconsin hosts a 30-Minute Music Hour as a way to showcase the state’s independent artists
- Room tax provided \$45,000 in funding for the Greater Madison Music City project.



HERITAGE & PRESERVATION

- The Historic Preservation Plan was adopted in 2020 and the Historic Preservation Ordinance is currently being updated.

DIVERSITY, EQUITY & INCLUSION

- The City has begun work implementing the recommendations of the Equity in Music and Entertainment Report e.g.
 - A full-time staff position at the Mayor's office focused exclusively on promoting equity in arts and entertainment is being formalized
 - Equal Opportunities Commission Certified Partners training to witness music and entertainment events to ensure that equity is maintained is being created
 - The City is working on an ordinance to add an Affirmative Action Plan to the entertainment license application
 - The City is working on implementing grants or sliding-scale fees for arts events that require permits.

TRANSPORTATION

- Metro Transit bus system runs until 11:30pm everyday, with campus routes running until 3am
- Dane County Regional Airport is only six miles northeast of downtown Madison making it easy to get into town via taxi or bus
- The City is working to implement a Bus Rapid Transit system with construction expected to begin in 2023.

MUSIC SCENE

- There is an ample amount of talent in Madison, with a great diversity of genres.
- Many music events are organized all year, including free events.
- The Greater Madison Music City project is working hard to better understand the artists’ perspective on the current state of Madison’s music scene and is acting upon responses to create a better environment for musicians.
- “Small” forces within Madison (different organizations, groups, etc.) are sharing opportunities, promoting equity, etc.

MARKETING AND COMMUNICATION

- Madison joined media & marketing efforts and started working with Street Teaming.

SAFETY

- Mad Lit was able to create a safe environment during certain hours through a shared love for music.

ECOSYSTEM

- Madison concentrates more than 82% of the economic activity related to the music ecosystem within Dane County. The sector there generates a total of 4,865 jobs, a total Output of \$525 million, a total GVA of \$350 million and a compensation of \$182 million.
- Tradition of music festivals: In Dane County there are 25 festivals a year, all of which are concentrated in the City of Madison except for one, which is celebrated in the City of Middleton (Good Neighbor Festival).



WEAKNESSES

HEALTH & SAFETY

- The City's official Health & Safety web page does not contain NTE-specific information, regulations or guidelines e.g. rules around leaving nightclubs/any kind of process in place for people's safety (street ambassadors, etc).
- Entertainment businesses and venues are not included in the Public Health Madison & Dane County sector-specific newsletters.

ZONING

- No official entertainment or cultural district designated (other than the BID).

GOVERNANCE & INFRASTRUCTURE

- No Agent of Change policy in place
- No official music office.

ENVIRONMENTAL SUSTAINABILITY

- The City's Sustainability Office does not have any programs or resources specifically related to music, culture or NTE.

- The Sustainability Plan focuses on visual arts over performance art or music.

LICENSING & ORDINANCES

- No official busking policy in place
 - A confusing electricity for amplification distinction
 - Only five dedicated downtown performance spaces.

TOURISM & MARKETING

- No official Madison tourism plan
- Strict regulations for outdoor advertising.

TRANSPORTATION

- No 24-hour public transit system.

MUSIC SCENE

- Madison is still on its way to become a thriving music city and there are still not enough opportunities for local talent to be seen and expanded upon. There is a significant lack of performance opportunities and venue spaces to play or practice, for local and all-level musicians.

- Madison needs a variety of venues, bars and clubs that support the great variety of music genres that its musicians provide, especially Hip Hop and culturally relevant music, whereas at the moment, only a select few get the spotlight.
- The many free shows organized during the Summer are a good initiative and opportunity for the city, however, they can cause professional rates problems and a lack of opportunities to play in winter.

MUSIC EDUCATION

- Madison needs to continue its work on making good, strong music education accessible to everyone.
- There is a need to check in on the current University and schools' music programs and modernize them.
- From the education perspective, music options are very limited to classical / band, orchestra / choir / jazz. There is a need to expand this scope to make it more in line with Madison's rich music scene.

PROFESSIONAL DEVELOPMENT

- Madison's musicians are motivated and want to take their career to the next step but are lacking opportunities and resources to do so.
- There is a need to help artists receive professional recordings to help increase the income they receive from their recorded music. Low budget professional recording opportunities are also missing for small and local artists.

MUSICIANS' FINANCIAL COMPENSATION AND PROFESSIONAL ADVANTAGES

- There is a need for fair compensation for musicians, taking into account the work they provide, the hours practicing, the process of preparation, the size of the venue, the audience count, the size of the band, the event cost, the extent of the shows promotion etc, because trying to do music full time is very difficult and doesn't pay off for them unless they are working in the education field.
- The musicians are not paid fairly and some are forced to play for free or even asked to pay to be able to perform in big venues. This diminishes the perceived value of the music industry and forces artists and other contributors to seek work outside of the industry where they can afford other needs such as healthcare and childcare with more predictable income.

REGULATIONS, GOVERNANCE & PLANNING

- Madison can make long-term positive impacts by adjusting policies and regulations to support and optimize music. The changes needed include grants and funding, accommodations for the evening economy (after 5pm), liquor licensing, safety concerns and addressing the noise regulations.

SPACES, PLACES & INFRASTRUCTURE

- There is a significant lack of venues, available for all types of musicians, all year. There are not enough places for musicians to play, collaborate, hang out and practice. Madison is also missing alternative venues.
- There is poor venue consistency in terms of hosting Hip Hop / Black culture related events, and a need for a place for BIPOC to go. Madison is missing locally owned, diverse venues.

MARKETING & COMMUNICATION

- Madison needs an easy, organized way to know all of the music-based events happening for visitors and residents, because there is a lack of commercial and marketing work

to promote artists and events. There also needs to be more communication between venues and local bands to strategize show opportunities as well as getting people to come see shows.

- There is a need to connect more local shows with radio for promotion and sponsorship.
- Musicians need a network to meet and collaborate.

TOURISM

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



FUNDING AND INCENTIVES

- There is a need to create incentives for Madison residents to dive deeper into local music.
- There is a need for better access to funding for artist work, programs and venues. The government needs to be involved in funding artists.
- Accelerator Programs to better artist development are missing, there is a lack of artist funding opportunities, of Money and resources to pay artists, and of venue funding opportunities.

DEMOGRAPHICS

- Venues are racially divided by audience and performers
- Madison doesn't feature enough artists that the community can relate to.
- There is a lack of BIPOC audience attendance in Madison even if there are events that feature culturally relevant music.

ECOSYSTEM

- White workers earn more than Black and Asian workers. In the music ecosystem, White-identified workers earn 122% more than Black / African Americans and 136% more than Asian workers. In the rest of the economy White workers earn 58% more than Black / African Americans and 19% more than Asian workers.
- The studied area displays an income gap between the music ecosystem and the rest of the economy, where on average the rest of the economy has higher annual income.
- The music ecosystem is highly informal with self-employees making up most of the workforce in the area. This informality leads to a higher vulnerability which is accentuated in the 'artistic activities' segment.
- There is an indication that artists & creatives with a Hispanic or Latino/a/x background have a lower percentage of their income derived from artistic or creative sources. On average, 48% of their

income comes from sources not related to the music field, whilst for the non-Hispanic or Latino/a/x artists & creatives, it is 35%.

- Hispanic or Latino background creatives & artists are primarily located in the lowest income range. 75% of those surveyed who earn between \$0 and \$14k belong to this group, showing a disadvantage compared to other communities
- It is noteworthy that within the macro category of venues (with a total of 94), the category with the most observations is that of Bars, Cafés and Restaurants with Music with 50% (47) observations, followed by Multipurpose Venues with 31.9 % (30) while Dedicated Live Music Venues add up to 9.6% (9). This implies that the live music in Dane County falls primarily In venues not exclusively designed for live music.
- High concentration of the music ecosystem assets: Of all music assets located in the City of Madison, 80% are concentrated in nine Aldermanic districts (out of 20 Aldermanic districts).



OPPORTUNITIES

MUSIC EDUCATION

- There is a trend of early childhood experiences with music through school or family music exposure, which means potential future talent.
- Madison music professionals could be connected with schools because they would be great educators to promote and encourage music.
- Teaching artists recording skills could be an opportunity for them to help each other in their musical projects.
- New large venues such as Youth Arts Center make space for people to keep growing as musicians from youths to adults.

PROFESSIONAL DEVELOPMENT

- The creation of a syndicate, a place where musicians can be registered and get membership, would be an opportunity to develop the professional side of the music scene. It would help create a musical community and a network for musicians, facilitating collaborations.
- Helping musicians to get sponsorships from radio stations or other local companies could represent a great opportunity for them to take their career to the next level.
- Creating a low barrier for entry would help the musicians, it would mean that no matter their skill level or music style, they would find a place to play and people to play with.

- \$100 per person is agreed upon as a solid baseline for pay, however including bonuses from ticket sales, and in-venue purchases would be beneficial to artists. When talking about the budget, it was suggested headliners could receive 15, 20% of the budget, whereas supporting acts receive around 5 to 10%.

SPACES & PLACES

- Encouraging venues to organize live music shows (choose a genre and work with artists) by showing them they could make money from it, would be an opportunity to develop more venues and find work for musicians. Alternative options for venues like garages, attics, basements, backyards, etc could also be a pretty easy opportunity. Running a cost analysis to see what/how venues make and spend while hosting events could help.
- There is an opportunity to protect already existing local spaces like The Barrymore, Crystal Corner, Harmony Bar, Mickies on Willy St and to get the local community to go to these shows, rather than creating new venues.
- Increasing the number of outdoor performances as we inch out of the pandemic, especially in neighborhoods and parks, outside of restaurants could be a great opportunity. People will begin to expect a certain level of entertainment when they go out and they will begin to seek it.

- The UW holds the Union Terrace, Memorial Union, The Set at Union South, various theaters, etc., and these places could be utilized for those not within the UW system too. WSUM & WUD Music play a part in attracting regional and national acts. Collaborating with the UW to create a huge local music event has a lot of potential to boost the music scene.

TOURISM AND TRANSPORTATION

- Longer runways at the airport would be useful to attract more people, because it's hard to land on Madison's small runways. Access to Madison itself has to be easier. If it's easier to get to Madison there's a chance for tourism to boom.
- Wisconsin's climate could be used to Madison's advantage by, for example, combining skiing with music.

ECOSYSTEM

- In the music ecosystem, highly educated workers earn 117% more than workers with medium level education and six times more (601%) than workers with basic education. In the rest of the economy workers with higher levels of education earn 96% more than workers with medium level of education and 282% more than workers with basic education.
- Madison's music ecosystem showed great adaptability in the Professional & Supporting segment during COVID-19, where 6% of all staff surveyed were newly employed and 9% of all staff saw a permanent increase in working hours.



THREATS

MUSIC SCENE

- Music isn't considered work by the larger population, the value of music is understated and most musicians are underpaid, which is a more and more serious threat because this could discourage potential talent.
- Madison's musicians are getting most of their income outside of Madison, and generally they don't come back once they leave the city.
- Music stakeholders feel like the switch from local ownership to Live Nation ownership was more dramatic than COVID impact on the music scene.

MUSIC EDUCATION

- Pay as a private teacher is impacted by a saturated market of those providing cheap lessons.
- There seems to be a disconnect between what happens on campus vs what happens off campus. The UW and The Barrymore need to be bridged together.

- For students, deciding between continuing music and finding a different major can be a tipping point to stop pursuing music. There is a slow burning acknowledgement that there isn't money in music, you start hearing this early on in education. People feel like they have more security with the majors they are chasing.

COMPETITION / MADISON'S SCARCITY MENTALITY

- Frank Productions and Live Nations have shaped the scene to be a National top-down experience so local artists no longer have many venue performance options. There needs to be a separation between large companies and smaller businesses/entrepreneurs.
- The UW is so large that it pushes out local venues.
- There seems to be a scarcity mentality in Madison. There is a want for no competition.

AUDIENCE

- Showgoers are no longer willing to pay to see live music as they are used to free shows.
- Although there are a lot of people wanting to host shows, there aren't necessarily enough people that want to go to shows.
- BIPOC audience attendance is missing, even if there are events that feature culturally relevant music.

FUNDING

- There is a need for better loan opportunities. High interest rates and lack of approval can deter certain communities from being able to start up a venue or business.

ECOSYSTEM

- Due to COVID-19, the Creative & Artistic segment of Madison's music ecosystem experienced a loss of 49.4% of all income, which could result in a permanent decrease of people working in the segment.

6. RECOMMENDATIONS AND STRATEGIC PLAN



6. RECOMMENDATIONS AND STRATEGIC PLAN

The action plan outlined below will help define Madison as a global music city.

THIS WILL BE ACHIEVED THROUGH THE FOLLOWING OBJECTIVES:

- Create more equitable work conditions for music artists and professionals, which contributes to the economic viability of the area.
 - View arts sectors and the music ecosystem as valuable assets to the economy.
 - Cultivate partnerships between venues, promoters, artists, and other business owners.
 - Diversify cultural offerings in Madison by encouraging and incentivizing new businesses, artists, and cultural organizations.
 - Create opportunities for underrepresented businesses and business owners, artists, organizations, and genres.
- Attract tourists and people of different demographics to Madison by expanding the realm of events and activities that they can participate in.
 - Cultivate a thriving music ecosystem through collaborative partnerships and strengthened relationships.
 - Ease the path of access for those wishing to participate in the music ecosystem by allowing them an easily accessible platform to find goods and services and promote themselves.
 - Create a welcoming atmosphere and community.

ZONING AND PLANNING

LICENSING AND REGULATIONS

HEALTH AND SAFETY

MARKETING AND TOURISM

ECONOMIC DEVELOPMENT

MUSIC EDUCATION

The feasibility of each recommendation has been determined by phases, as seen in the following table.

YEAR 1	YEAR 2	YEAR 3
RECOMMENDATION #1 Appoint a Music Officer		
RECOMMENDATION #2 Incorporate the Agent of Change Policy to Protect Live Music Performances and Venues		
RECOMMENDATION #3 Expand Entertainment District Parameters with Cultural and Creative Districts		
RECOMMENDATION #4 Review and Revise Sound Ordinance Policies		

YEAR 1	YEAR 2	YEAR 3
RECOMMENDATION #5 Make Event and Liquor Permitting Interfaces More User-Friendly		
RECOMMENDATION #6 Promote Musician-Friendly Parking Regulations like Musician Loading Zones		
RECOMMENDATION #7 Implement a Busking Policy and Revise Downtown Performance Permit		
RECOMMENDATION #8 Create a Best Practice Guide for Music-Related Venues		
RECOMMENDATION #9 Promote Sustainable Policies Specific to the Music Ecosystem		
RECOMMENDATION #10 Promote Madison’s Musical Heritage		
RECOMMENDATION #11 Design a Cultural Tourism Plan		
RECOMMENDATION #12 Advocate for a Fair Pay Policy for Musicians		
RECOMMENDATION #13 Identify Pathways for New and Diverse Cultural Projects		
RECOMMENDATION #14 Create a Directory of Music Businesses and Local Talent		
RECOMMENDATION #15 Begin a City-Wide Music Education Initiative that Cater to Non-Performance Related Careers		
RECOMMENDATION #16 Implement Training Programs and Incentives to Make Music Ecosystem Leadership More Inclusive of Minoritized Populations Development Programs		
RECOMMENDATION #17 Incorporate Audience Development into Cultural Arts Planning		

7. CONCLUSION



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This first phase of the Madison Music City Recovery Framework is the result of four months of research and analysis in collaboration with The Greater Madison Music City Project.

The work aimed to provide an understanding of Madison’s current standing as a music city economically through its contributing assets in relation to Dane County, the state of Wisconsin, and at the national level. This assessment focused on the economic impact of the music ecosystem in Madison and an inventory of its assets to serve as a starting place in understanding how Madison can identify the most effective processes to achieve a sustainable, supportive and diverse music ecosystem that works to benefit all communities.

The data captured in this report shows that Madison contributes 84% of the County’s music employment, implying that it is both the area with the largest economic activity concentration overall and the highest concentration of economic activity specifically within the music ecosystem of Dane County. With this existing level of activity, it can be assumed that Madison has an opportunity to take the lead in becoming an even more vibrant music city, all while offering opportunities for growth and promoting greater inclusion among its neighboring communities. Knowing the existing assets in Madison’s music ecosystem and their economic impact is a solid first step towards the development of an effective and resilient recovery music strategy as well as a great tool to benchmark Madison with other cities and to assess what requires amendment, optimization, or reform through a regulatory assessment and literature review.

Following a robust comparative analysis and regulatory assessment, deeper engagement with the community through surveys and stakeholder interviews is necessary to ensure the widest breadth of feedback so that recommendations in the developed framework are actionable and equitable and address the goals of leveraging sustainable tourism, but also an inclusive and diverse music ecosystem for all.

It is our hope to continue this work to help the Greater Madison Music City Project and the City of Madison develop its advocacy, infrastructure, education, promotion, and tourism to fully leverage their music ecosystem and benefit more from the opportunities music can bring to the city.

ACKNOWLEDGEMENTS

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



ABOUT SOUND DIPLOMACY



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

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

73 The survey conducted by Sound Diplomacy to music ecosystem Artists & Creatives segment did not have a statistically representative sample, hence, the results shall be read as an indication of the key differences.



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