



MUSIC CITY STRATEGIES

Phase One Report

**West
Anthem**

Prepared by

 **BIRD CREATIVES**

This report is part of the groundwork, upon which West Anthem, the National Music Centre, the Government of Alberta and Alberta Music are building music city strategies.

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LAND ACKNOWLEDGEMENT

Alberta spans five treaty territories and eight Métis settlements. Like their ancestors, many Indigenous individuals and families make their homes across the prairies, including the Blackfoot Confederacy – Kainai, Piikani, and Siksika – the Cree, Dene, Saulteaux, Nakota Sioux, Stoney Nakoda, and the Tsuu T'ina Nation. The Métis People of Alberta include the Six Regions of the Métis Nation of Alberta. Many First Nations, Métis, and Inuit, both from here and as visitors from elsewhere, have helped care for these lands for generations. We recognize they have traditions and relationships to the land far outstretching the arrival of settlers.

We are extremely grateful for these lands on which we reside, work, and play. We make this acknowledgement as an act of gratitude and reconciliation. While championing music across Alberta, we intend for our work to contribute to the valuing of traditional musical forms and result in greater opportunity for the creative Indigenous talent who walk these lands today.

BACKGROUND & CONTEXT

Many aspects of Canada’s music ecosystem were hit incredibly hard by lockdowns and health restrictions. Despite this, our nation’s music market grew by 12.6% to a total of US\$583.6 million in 2021¹. Similarly, within Alberta, certain members of the music industry—e.g., small-scale live music venues, independent touring artists, etc.—faced intense hardship, yet the 2022 summer saw well-attended and even sold-out music festivals. Within this context, Alberta’s music industry has the opportunity not only for recovery, but for resilient growth and renewed visioning of what is possible.

To take advantage of the opportunity present in the music industry, West Anthem, the National Music Centre, the Government of Alberta and Alberta Music are partnering to create tactical business strategies for ‘music cities’ in the province (focusing on Calgary, Edmonton, and smaller municipalities). With such strategies in hand, Alberta can realize the economic benefits of music as we recover from the adverse effects of the pandemic. This also means investing in an industry that has countless positive knock-on effects for the wellbeing of Albertans and the liveability of our cities and towns.

As shown in the timeline below, the strategies will build on years of advocacy and work, most notably the West Anthem Music Ecosystem Study, published in October 2020.

Music cities are “communities of various sizes that have a vibrant music economy which they actively promote.”²

2012
Scotlyn Foundation and the National Music Centre found Alberta Music Cities Initiative (now known as West Anthem).

2014
“Fertile Ground: The Alberta Music Cities Initiative”
Published by the National Music Centre

2019
Over 3,040 respondents participated in West Anthem’s two online surveys between November 2019 and January 2020.

2020
[West Anthem Music Ecosystem Study](#) published in October.

2020-2022
There was a very distracting world event. Can’t remember specifically, but it was “unprecedented”.

2022
West Anthem partners with Alberta Music and the Government of Alberta to develop music city strategies for Edmonton, Calgary, and a toolkit for smaller municipalities.

2023
Music City Strategies Phase One Report completed

2023 -
Ongoing Engagement, Research and Strategy Formation.

We are bringing musicians, music lovers, industry, and government partners to the table to develop the Music City Strategies.

We’ve saved you a seat.

Over the next year, activities of the Music City Strategies include:

- Articulating how to differentiate Alberta, and Calgary and Edmonton as music cities
- Creating tailored music city strategies for Calgary and Edmonton
- Collaborating across municipalities and jurisdictions to determine common measures that allow us to track progress and successes for music cities
- Identifying and testing quick wins through intentional, small experiments to test and build on what works in the music industry
- Sharing a toolkit of strategies for smaller municipalities across Alberta to draw upon
- Supporting implementation, where possible, and monitoring outcomes

MUSIC ECOSYSTEM UPDATES

Since the initial release of West Anthem’s Music Ecosystem Study in 2020, the landscape of the music industry in the province, and around the world, has changed rather dramatically. In 2021, despite the incredible challenges of the pandemic, Canada’s music market grew by 12.6% to a total of US\$583.6 million making it the 8th largest market in the world³. Using the latest Statistics Canada numbers available, we see that the provincial music economy was impacted by the pandemic in 2020, but showed surprising resilience. See Table 1 on the next page for a summary of economic indicators in Alberta.

\$1.7 billion

Alberta’s music ecosystem GDP (including direct, indirect, and induced impacts) was nearly CAD \$1.7 billion in 2020.

20,577 Jobs

Total jobs supported by the music ecosystem in Alberta were 20,577 in 2020 (across live performances, sound recording, and audio visual and interactive media).

150+ Festivals

Despite about 20 music festivals in Alberta being canceled during the pandemic, Alberta is still home to a thriving music festival scene with 150+ ongoing festivals with music in their mandates across Alberta.

1 in 7 Venues

Prior to the pandemic nearly 600 venues were reported across the Edmonton and Calgary metro areas⁴. Upon a review in February 2023, we found 81 of venues identified in 2020, or about 1 in 7, had permanently closed (67 venues), temporarily closed (13 venues), or pivoted to a new focus. While the festival scene is thriving, live music venues in Alberta have a number of obstacles to face post-pandemic that will require strategic support.

Resilient Job Rates

Despite the data reflecting the year Covid-19 first impacted Albertans, the overall job rates only show a minimal decline of 3.27%. Conversely, wages decreased substantively (from \$1.29 billion in 2017 to \$711 million in 2020). Combined, this suggests that local businesses adapted to keep staff employed and self-employed workers stayed in the industry whenever possible. This is an encouraging finding as it suggests a highly committed talent pool, resilient even in times of incredible strain.



TYPE OF IMPACT	EMPLOYMENT (NUMBER OF JOBS)	GDP \$ (x1000)	OUTPUT \$ (x1000)	WAGES \$ (x1000)
Direct	9,868	1,046,521	1,831,379	559,229
Indirect	6,167	336,348	1,208,171	95,254
Induced	4,542	305,884	892,232	56,964
Total Impact	20,577	1,688,753	3,931,782	711,447

Table 1.
Alberta. Direct, Indirect, Induced, and total economic impact

The likeliest culprit for the decline in the economic impact of the music ecosystem in Alberta between 2017 and 2020 is the COVID-19 pandemic. The pandemic led to the cancellation of live events, concerts, and festivals, resulting in a significant decline in revenue for the music industry. The restrictions and lockdowns also affected the music industry’s supply chain, with many businesses facing challenges in the production, distribution, and sale of music-related products and services. As a result, the decline in output, GDP, employment, and wages in the music ecosystem can largely be attributed to the immediate economic impacts of the pandemic. Long-term, structural changes (e.g., emergence of new technologies for music production, distribution and consumption, changes in consumer preferences, shifts in the market share of music genres, etc.) will take two to three years to materialize and measure accurately.

AUDIT OF OPPORTUNITY AREAS

Although the landscape of the music industry has changed since the West Anthem Ecosystem Report came out in October of 2020, there has nevertheless been movement and momentum building on many of the “Opportunity Areas” identified in the West Anthem Music Ecosystem Study. Out of 31 identified opportunity areas, 10 have seen little-to-no movement, 14 have momentum building, and six show clear progress (for full details see Appendix A).

Below are tables of the opportunity areas, split by regional applicability (i.e., provincial, Calgary, and Edmonton). Opportunities are reviewed from greatest to least progress.



Provincial Opportunity Areas for Music Industry

The province of Alberta is in a unique position to support and advocate for the music industry and has already taken important steps to continue creating an environment amenable to the music industry.

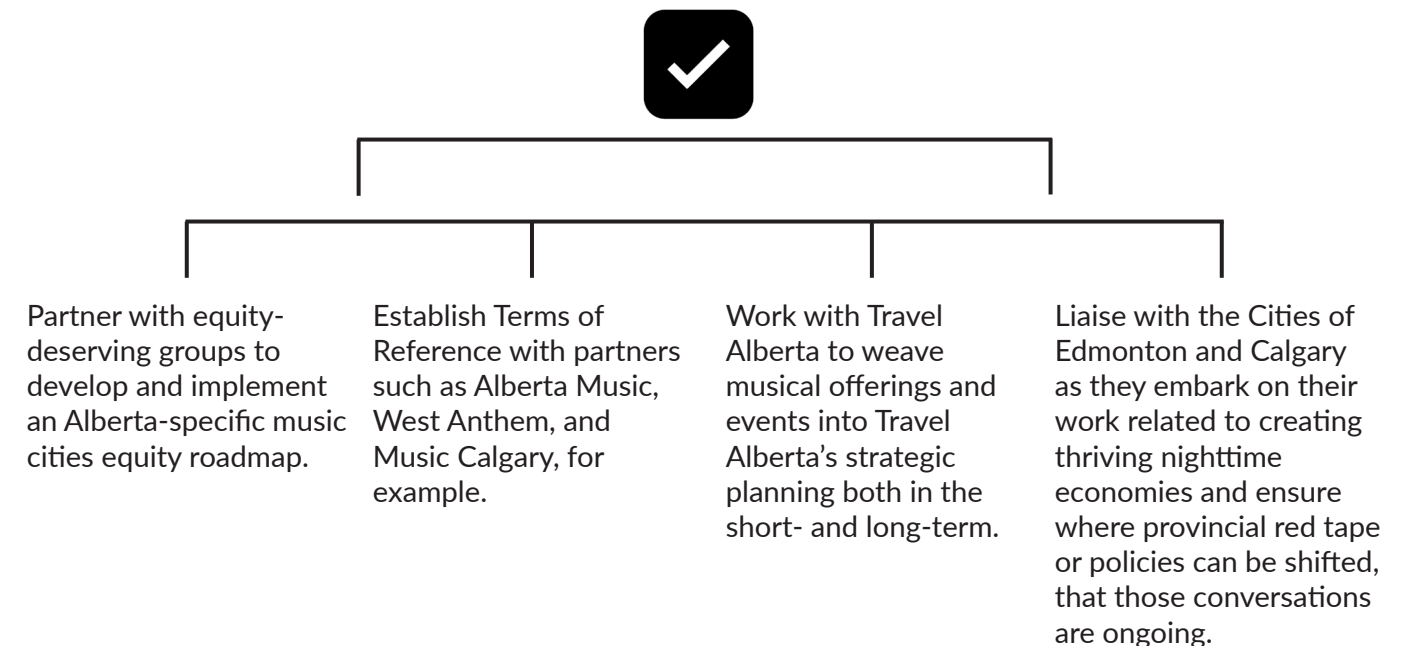
	OPPORTUNITY AREA	PROGRESS	NEXT STEPS
PROGRESS	#15 Implement and Distribute ‘Fair Pay’ Program to Properly Compensate Artists	Passage of Arts Profession Recognition Act	Help artists understand the Act and support implementation; Create advocacy toolkit with the music sector; Define details of what Fair Pay means
	#20 Create a “This is Alberta” Playlist on Streaming Channels, Promoted through Tourism Departments	Alberta Music created a playlist featuring Albertan Musicians on Spotify	Find ways to integrate music sector into overall Alberta Tourism strategy; Create more playlists of different genres; Explore other social and streaming channels to share; Curate and share provincial content with CKUA or other radio stations.
MOMENTUM BUILDING	#1 Position West Anthem as Music Advisory Council Representing Alberta’s Music Sector	Partners from Alberta-based music organizations such as West Anthem and Alberta Music which include representation from Edmonton and Calgary and could be used as first points of contact for setting up a music advisory council.	Work with the Ministry of Culture to determine whether and how this music advisory council can be regularly consulted.
	#5 Work with 2SLGBTQ+ Communities to Increase Opportunities through Music Diversity Groups, Events and Mentorship Programs	In 2021 RISE UP Calgary partnered with Calgary Pride and Scotiabank Backbeat to present some of Calgary’s best queer musicians at Studio Bell. In 2022 Play the Parks prominently featured LGBTQ artists.	Connect and explore partnerships with 2SLGBTQ+ serving organizations; Review equity frameworks recently published in the creative sector such as BC’s Creative Equity Roadmap ⁵ and explore ways to adapt and incorporate learnings to the Alberta context.
	#6 Partner with Marginalized Groups to Identify their Specific Music Needs and work Together to Develop Routine Career Support Programs	Making Space ⁶ is a virtual peer mentorship program focusing on the needs and wants of early career BIPOC visual artists. Creatives Empowered is an Alberta-based, virtual non-profit collective of IBPoC focusing on supporting individuals in film and television.	Connect with equity deserving ⁷ organizations to review equity frameworks recently published in the creative sector such as BC’s Creative Equity Roadmap and explore ways to adapt and incorporate learnings to the Alberta context. Consider how to expand mentorship and professional development offerings within the music sector specifically.
	#12 Provide Musicians with Development and Education Opportunities Surrounding Modern Career Development	Alberta Music has several programs for supporting professional development including: DOWNLOAD ⁸ offers expert-led training sessions, LIVESTOCK covers a range of local and international showcasing opportunities for artists, and Project WILD educates, develops, promotes, and launches the careers of Alberta’s up and coming country and roots artists.	Review surveys and current reports, lessons learned from Project WILD, around what musicians and industry professionals need for career development and co-develop a series of career modules with National Music Centre, West Anthem, Alberta Music, and educational institutions in AB specializing in music such as MacEwan.

	OPPORTUNITY AREA	PROGRESS	NEXT STEPS
MOMENTUM BUILDING	#14 Offer a Music Entrepreneur Program to Support Developing Artists, Further Harnessing and Supporting the Already Established Entrepreneurial Community within Each City across Alberta	The National Music Centre has a 5-week long Artist Entrepreneur West Program to build sustainable business and careers in music. MacEwan University offers courses that address entrepreneurial skills for musicians.	Co-develop with NMC, WA, Alberta Music, and educational institutions in AB specializing in music, ways to further support artists and other professionals in the music industry.
	#22 Fully Integrate Music Tourism into Tourism Strategies and Offerings, Making it a Focal Point of Attraction through a Strategy or Action Plan	West Anthem submitted suggestions for integrating music tourism into Alberta Tourism's overall strategies and activities in December 2022. See Appendix B.	Collaborate with the Ministry of Culture and explore ways to connect regularly with Travel Alberta to confirm alignment and work towards mutually beneficial deliverables.
	#25 Organize the Implementation of a Night-Time Operations Office and Advisory Board	The City of Edmonton and Explore Edmonton are partnering to develop a night-time economy strategy for the city. Engagement is underway. ⁹ "Nighttime Economy" is named as a transformational initiative in Calgary in the New Economy	Provide funding and advocacy support for implementation of the final strategy and recommendations as it pertains to Night Mayors, and other recommendations pertaining to music city advancement.
	#28 Establish a Stronger Local Music Export Offering Including Increased Export-Ready Programming and Enhanced Promotion of Existing Opportunities	As part of Alberta Music's Backstage Pass program, they are partnering with Enki Music on a mentoring and Export Development Program for markets in the UK and Europe for 2023. ASKIY Export Residency is an opportunity specifically for Indigenous Artists.	Capture learnings from export programs already underway. To advocate for further funding and support, create an Alberta-based approach to export programming and promotion by incorporating those learnings, identifying appropriate measures of success, and adapting successful models for export programs.
LITTLE PROGRESS	#2 Create Routine All-ages Events and Venues	For these opportunity areas with minimal movement, we will engage with partners and collaborators to understand: (1) whether any of those opportunity areas are priorities since little movement has been made and, (2) if they are priorities, what might some of the barriers be to progress on those opportunity areas.	
	#9 Work with Indigenous Communities to Integrate Indigenous Music Education Programs into Provincial Curriculums		
	#13 Organize and Implement Long-Term Artist Program (12 mos) that Provides Developing Artists with Professional Experiences, Educating Musicians on Career Development and Sustainability through a Practical Process		
	#21 Offset the Costs of Booking International Artists by Drawing in Musicians to Record in Alberta through a Reimbursement Program		
	#16 Facilitate Permitting and Temporary Activation of Empty Buildings and Spaces to Create Cultural Offerings for Youth, Artists, and Musicians		
	#17 Facilitate Long-Term Creation of Music Spaces (Education, Rehearsal, Recording and Performing) through Incentives to Developers of New Projects and Redevelopers of Existing Buildings		

The province can pave the way for music cities and communities to flourish in Alberta. Based on where progress has been made and momentum is building, four areas emerge as candidates for support:

1. Continue to recognize the professional nature of musicians and music industry professionals. Support the music industry by advocating, legislating, and enforcing standards of fair pay and good working conditions – all critical for attracting, retaining and building thriving music communities.
2. Work across the province with cities and smaller communities to weave music offerings into the Travel Alberta strategy. Music tourism can be leveraged to draw in visitors and their tourism dollars. Benefits of music tourism include revenue from concerts and festivals as well as merchandise, and money spent on hotels, transportation, and restaurants¹⁰. See Appendix B for specific recommendations.
3. Commit to co-develop and fund programming aimed at supporting and creating opportunities for equity deserving groups in the music industry. Use the work from Creative BC's Creative Equity Roadmap¹¹ as a starting point and work in partnership with equity deserving groups to adapt and refine for the music industry in Alberta.
4. Participate in identifying quick wins that align with provincial priorities and provide funding and input for small experiments that can be used to test and build on what works in the music industry.

Opportunities for the province to capitalize on Quick Wins:





Calgary Opportunity Areas for Music Industry

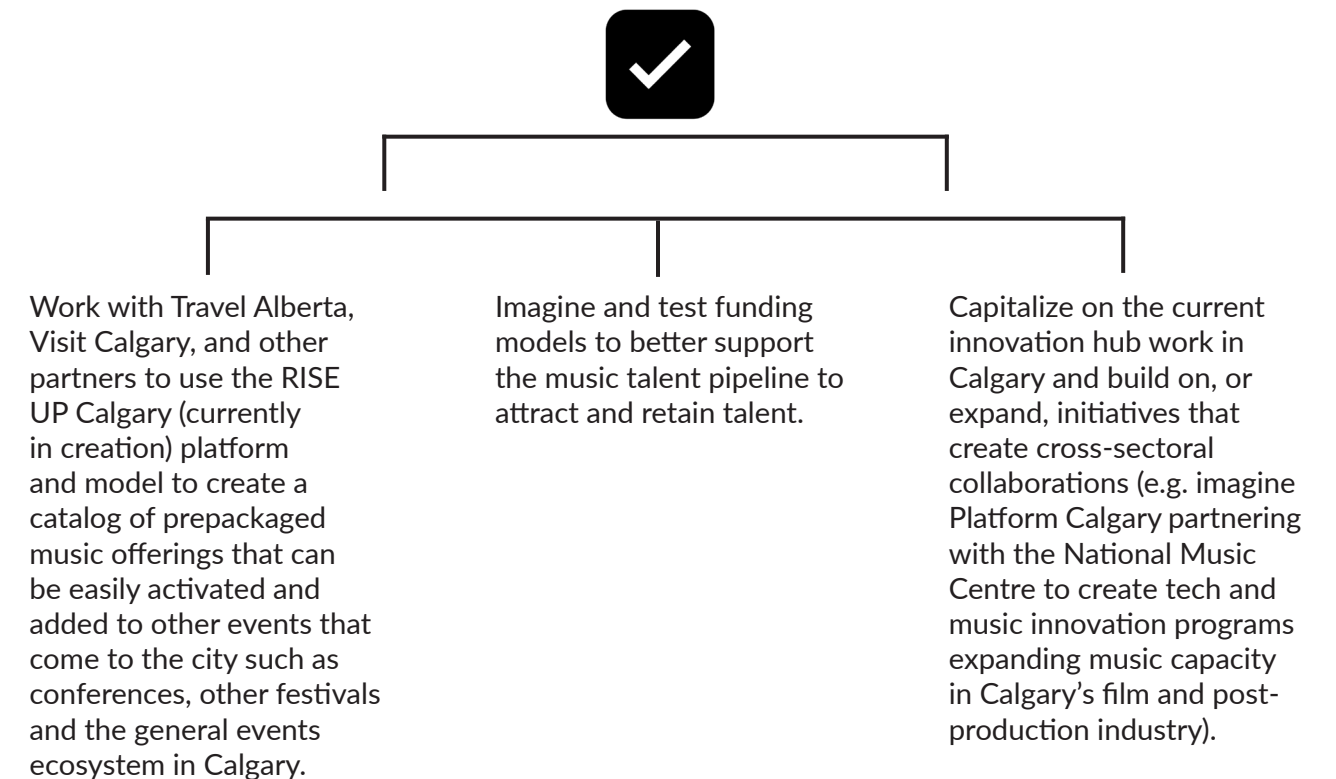
Home to the National Music Centre and Studio Bell, the city of Calgary has been focusing on nurturing their creative economy for several years. As a result, Calgary has been able to make progress on several opportunities.

	OPPORTUNITY AREA	PROGRESS	NEXT STEPS
PROGRESS	#23 Engage in Global Music City Events	Calgary and Edmonton co-hosted the 10th annual Music Cities Conference in 2022. Topics included, tech in music, music therapy and emerging opportunities with the growing film industry. Calgary hosted the 2022 CCMA—demonstrating the ability to host large scale events, while Edmonton hosted the JUNO Awards in March 2023.	Continue to build on and collaborate with other events in 2023. Explore opportunities and conversations with global music city events around tech in music, music therapy and the growing film industry in the city and province.
	#29 Host Music Export Seminars and Fairs	Music export sessions at the 20th BreakOut West Festival & Conference in 2022	Continue hosting more export sessions as part of upcoming music festivals and conferences.
	#30 Further Expand and Build Upon Roots of the SoundOff Summit	SoundOff Virtual Showcase featured artists at 6 venues across Calgary.	Partner with Canadian Independent Music Association for future events
MOMENTUM BUILDING	#10: Establish a Music Therapy Education Program that Provides Training Certifications or Accredited Credentials	In 2021, Mt. Royal University Conservatory offered an online introductory course to Music Therapy.	Work with the Music Therapy Association of Alberta and Canadian Association of Music Therapists to explore additional possibilities and offerings at Alberta institutions to establish a full program. Currently only 6 schools in Canada offer CAMT-Recognized Music Therapy Education programs; none are in Alberta representing an opportunity to create a program in Calgary.
	#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	During COVID-19 restrictions, Calgary explored funding music events in a number of temporary venue settings (i.e., community parks and parking lots). A forthcoming report from CreativeCITY also points to concerns over the variety of venues accessible outside the downtown core—pointing to the need of this particular opportunity.	Explore the challenges and create tools to help existing suburban infrastructure (e.g., sports complexes, public libraries, and community association halls) successfully host music-focused events.
	#26 After-Hours Venue Permits	Calgary's festival and event strategy engagement with public input found that participants want festivals and events to go beyond 10PM. Currently late-night venues can apply for a special permit for one-time events.	Engage with the venues and event producers and find a champion on city council that can help bring the question of after-hours permitting forward. Also dovetail with work on Nighttime Economy
LITTLE PROGRESS	#3 Late Night Transit Strategy	Determine whether this is still an important opportunity area and if so, identify some of the barriers to progress on this opportunity.	

Three key initiatives are proposed as helping to advance the music industry in Calgary:

1. There is an opportunity to align efforts and opportunities across the music industry and other strategies underway, for example related to the development of Calgary's night time economy and the forthcoming CreativeCITY strategy. An important activity that could be undertaken to inform multiple partners' work in this area would be to identify barriers and opportunities particularly around after-hours permitting and late-night transit.
2. Calgary has launched many notable, commercially successful musicians and continues to nurture export-ready artists. To support Calgary's music ecosystem and talent pipeline, and continue to attract and keep talent in Calgary, explore how to support the talent pipeline with professional development, innovative export programs and funding for the music ecosystem infrastructure.
3. Explore the viability of running an accredited Music Therapy program through one or a combination of Calgary's post-secondary institutions. The nearest such program is at Capilano University in North Vancouver, BC, with only six in the entire country. Calgary has a natural advantage as the home of Studio Bell and the National Music Centre. Determine how this program could fill gaps between the existing six programs. For example, a music therapy program attuned to Indigenous ways of knowing, adapted for those experiencing the specific challenges of newcomers in Canada, or for virtual delivery to better serve remote and rural communities across Canada.

Opportunities for Calgary to pursue Quick Wins:





Edmonton Opportunity Areas for Music Industry

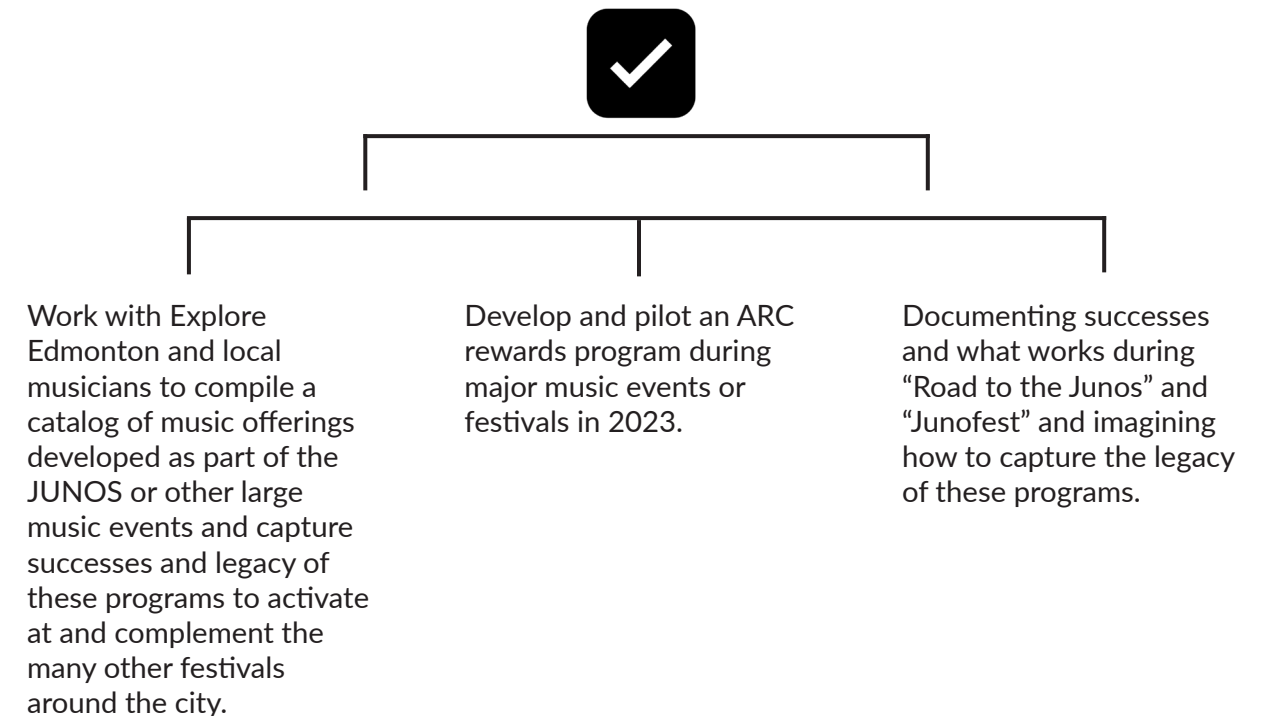
With the addition of the ICE District to Edmonton in the last few years and the emergence of some key infrastructure pieces like the ARC transit fare system, Edmonton has the opportunity to intentionally build music city strategy work into a number of municipal strategies as well as build on its reputation as a Festival City.

	OPPORTUNITY AREA	PROGRESS	NEXT STEPS
PROGRESS	#8 Encourage Engagement in Musical Events, Performances, and Showcases Through Transportation Reward Programs (TRP)	The ARC transit program has launched and is excellent infrastructure for a TRP that could be used to increase engagement with musical events and performances	Collaborate with the City of Edmonton to explore how ARC can be used to increase and reward transit to music venues on city transit; consider piloting some version of this during upcoming large music events this year.
	#11 Initiate a Program Based on Musical Scoring (film, television, and gaming)	Several institutions in Edmonton offer relevant courses already including MacEwan and NAIT.	Explore with institutions in Edmonton as well as industry partners whether and how such a program might be developed as part of a larger pipeline of talent for the province.
MOMENTUM BUILDING	#19 Maximize Music Spaces throughout the City by Hosting Daytime Music Events and Shows with a Particular Focus on the ICE District	Edmonton's ICE district has worked to offer attractive programming throughout the year (e.g., TG ICE Fridays, summer SolstICE events). In Dec. 2022 the Oilers Entertainment Group announced a year-round 'Fan Park' coming to the ICE District including capacity for concerts. ¹² YEG Stage, Edmonton International Airport's live music program relaunches beginning June 2023.	Continue to activate the ICE district with a focus on early afternoon and morning times. Collaborate with the City and ICE district partners to expand the daytime music options available.
	#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	Indigenous Music West has launched ASKIY Export Residency ¹³ for Indigenous musicians in Western Canada. The program was developed by the Indigenous Music West program at Manitoba Music in partnership with Creative BC. Alberta Music is launching a 10-month Indigenous Development Program in 2023 funded by the Government of Alberta.	Work to bring Alberta partners such as West Anthem and Alberta Music to the program to provide funding, expertise, and ensure Alberta also has a seat at the table for developing and supporting Indigenous talent. Can use the learnings and template from ASKIY to create local hubs or cohorts for Edmonton and Calgary.
LITTLE PROGRESS	#4 Develop Edmonton Busking Guidelines	For these opportunity areas with minimal movement, we will engage with partners and collaborators to understand: (1) whether any of those opportunity areas are priorities since little movement has been made and, (2) if they are priorities, what might some of the barriers be to progress on those opportunity areas.	
	#7 Strategically Coordinate Festivals Events, Dates and Plans, Allowing for More Engagement throughout the Year, Avoiding and Over Cluster of Offerings		
	#27 Organize and Promote Evening and Late-Night Transit Safety Strategies to Work in Conjunction With Late-Night Transit Service		

To create traction in Edmonton we note a few key opportunities:

1. An important opportunity emerging is that Edmonton and six surrounding municipalities, have introduced the ARC pay-as-you-go fare system along with the requisite infrastructure. This is an exciting step towards imagining and implementing a transportation reward program related to music events and venues. Next steps would be to engage with the transit system and music promoters to explore ways of making it possible for concert- and festival-goers to easily "spend" credits.
2. Related to the above, consider how Edmonton's On Demand transit service or just-in-time services may be used for audiences of large-scale music activations. Create workable pathways for event planners to connect with the Edmonton Transit System about such possibilities.
3. Align efforts and opportunities across the music industry and Edmonton's nighttime economy work to identify barriers and opportunities particularly around late-night transit safety, and busking guidelines. As part of the night time economy strategy, continue increased funding from the City of Edmonton to for-profit music venues to offset increased costs associated with running a for-profit music venue.

Quick Wins for Edmonton might include:



As we move forward with developing the skeleton strategies for Edmonton and Calgary, we suggest a three-pronged approach related to the Opportunity Areas:

1. Explore what it would take to actualize and test some of the Quick Wins - quickly!
2. Engage with partners and the music industry around the Opportunity Areas that saw little movement and identify whether those opportunities are priorities and if so, explore what barriers might be at play.
3. Identify opportunities for alignment across the music city strategies for the two cities and province to ensure synergy while removing red tape.



MEASURING A MUSIC CITY

We've reviewed the opportunity areas identified in 2020 and updated them for consideration today. The next important step is establishing the key indicators that will meaningfully measure and track the health of civic and provincial music ecosystems. Over time, these serve to improve strategic investing and decision-making.

To do this, music strategies from 11 Canadian provinces and territories and six Canadian cities were reviewed. Proposed indicators and data points were tracked and organized according to emerging themes (e.g. economic, people, spaces & places, etc.). A full compendium of data elements can be found in the online document Data Dimensions of Canadian Music City Strategies. See the table below for a summary.

	DIMENSION	EXAMPLES OF DATA ELEMENTS
	ECONOMIC	ROI of tax dollars invested, GDP, #FTEs, labour income
	TOURISM IMPACT	Music activities linked to tourism dollars spent, hotel capacity
	PEOPLE	# musicians, # music professionals, demographics of artists, music professionals, and audience
	SPACES AND PLACES	Venues (size of venue, location, quality), festivals (attendance, revenue, safety)
	INDUSTRY-SPECIFIC	Genre, albums recorded, awards, streaming, followers, income, # of specific music business (recording studios, entertainment lawyers, publishers, etc.)
	SOCIETAL	Measures of health, well-being, connectedness, cultural identity

Interestingly, this review revealed rather quickly that Canadian cities and provinces are generally very new to this work. Strategies were still in the early stages of articulating impact, most still determining what data would indicate that a desired impact had been achieved. The exception was the inclusion of economic indicators such as contribution to GDP, full time jobs created, labour income, etc. This is unsurprising as many of these are already common indicators are required by funding bodies. Outside of economic indicators, however, there is no consensus around key indicators nor how to measure them.

This presents both a challenge and an opportunity. The challenge is to determine the best indicators to include in the Alberta specific strategies. The opportunity is to do so with intention, developing indicators and inviting other jurisdictions to follow suit and eventually develop a core set of key indicators that allow Canadian jurisdictions (civic and provincial) to be compared, celebrate successes, learn from challenges and advocate effectively for the industry. All while showcasing Alberta's leadership in this area.



Our recommendations based on the strategy review:

- For the upcoming Edmonton and Calgary music city skeleton strategies we will include:
 - core economic and related tourism indicators because they are the most commonly used and influential metrics in policy decisions, and
 - key demographics because of the importance of understanding and advocating for equity, access, and diversity in the music industry.
- As part of engagement with partners over the next few months, define specific goals or desired impacts of each music city strategy (cities and provincial). From there, determine additional indicators and data collection methods that capture movement or success of those goals or impacts.
- As part of our upcoming engagement with the sector, consider how best to include and adapt existing frameworks (e.g., from Mastering a Music City and Toronto's Music City Strategy) into the skeleton strategies for Edmonton and Calgary.
- Convene a table of national industry advocates and representatives invested in the success of music cities. A major goal of this group would be to identify (and/or develop) a framework that might serve as a Canadian framework for music cities and create a Canadian Music Cities Index. This would be key to tracking indicators in multiple cities over time, giving crucial insights on successes, barriers and the impact of policy, funding, and strategic plans. A national framework would ideally serve national priorities (e.g. the Truth and Reconciliation Commission of Canada's Calls to Action, the United Nations Sustainable Development Goals, etc.).

Engagement and Reporting of West Anthem's Work

The best reports, the surest strategies, and the most fascinating facts are useless if no one engages with them. Building off of our early work (i.e., gathering 3,040 responses to our online surveys for the Ecosystem Study), we want to ensure that this process remains transparent and that our findings are accessible to all Albertans passionate about music.

Our engagement and reporting efforts will focus on the overarching goal of enhancing the reputation of West Anthem's music cities work.

Our main objective related to that goal will be to generate awareness of the work done to date, the process still underway, and the forthcoming strategic plans. Our focus will be on people and organizations within the music ecosystem already (e.g., performers, producers, venues, policy makers, music shops, instructors, and engaged audience members, etc.).

Our initial tactics will be:

- Make the Music City Strategies process and information accessible to the public
 - » Create a central source for this information and updates on the West Anthem Website
 - » Ensure the dedicated project webpage is reviewed monthly to ensure up-to-date information for visitors
- Drive traffic to the website to view phase reports and the final report once launched
 - » Identify where our target audience is engaged online
 - » Select best platform(s) for communication
 - » Prepare and share monthly updates on the process (may adapt depending on platform selected)
 - » Link to webpage on every social post and in any emails

Our initial key messages:

- Music is a vibrant piece of a diversified economy
- West Anthem is a champion of the Alberta music ecosystem
- The scope and impact of the music ecosystem extends far beyond musicians



West Anthem Steering Committee

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President & CEO, National Music Centre

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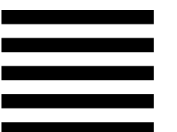
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- 12 https://edmonton.ctvnews.ca/fan-park-with-3-outdoor-rinks-coming-to-ice-district-oilers-announce-1.6178811?cid=sm%3Atrueanthem%3Atrueedmonton%3Amanualpost&utm_campaign=trueAnthem%3A%20Trending%20Content&utm_medium=trueAnthem&utm_source=facebook&fbclid=IwAR3r518Lg6e2Oo68cfjUd-OBodMi-YVnyAYXezOyYKGyy1qEiw-OfJCUpSSI
- 13 <https://www.indigenousmusic.ca/news/read,article/8265>

PHOTO CREDITS

- Cover Page - Canada Day Celebration 2018, Studio Bell, Photo Credit: Neil Zeller
- Page 4 - Sled Island 2019, King Asyisoba at Broken City, Photo Credit: Michael Grondin
- Page 5 - RiseUP Calgary Outdoor Concert 2020, Mariya Stokes & Devin Cooper, Photo Credit: Michelle Spice
- Page 13 - Rolling Stones Mobile Interior, Studio Bell, Photo Credit: Brandon Wallis
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APPENDICES

Appendix A:

Strategic Opportunities Updates

In 2020, West Anthem published the [Music Ecosystem Study](#) in which 31 strategic opportunity areas were proposed as foci for advancing Alberta's music economy. COVID-19 created a delay in much of this work. As we once again dig into this important work, West Anthem considered it key to revisit the opportunity areas to determine how circumstances have changed, what progress has been made, or what barriers might be identified.

How to read these updates:

Opportunity Area #: Title of Opportunity (p.# location in the 2020 report)

- Bullet point list of updates, links, interesting facts, advancements or barriers noted as pertinent to the opportunity area or suggested action as of December 2022.

Calgary Opportunity Areas

Opportunity Area 3: Implement Late-Night Transit Programs (p.37)

- End times for Calgary train lines remain relatively unchanged after this report. Calgary could pilot an overnight train schedule during a busy time of the year (i.e., Calgary Stampede).
- The green line should improve access to the city centre. However, [stage 1](#) is still in construction (anticipated finish 2023-2026).
- Subsequent Green Line stages may take as long as 5 years to complete (see minute 1:00 on this Q&A with Green Line CEO Darsphreet Bhatti [LINK](#)).
- According to a 2015 proposal, Calgary Transit said that they would need 15+ riders per hour in order for late-night bus transit to be feasible. ([LINK](#))
- "Transit" was one of the most often mentioned top-of-mind issues for Calgary's 2022 Fall survey, "Calgary Transit" was among the top priorities for more investment, and sense of safety on transit, especially at night, is an issue that needs to be considered around late-night transit programs (look for 2022 Citizen Perspectives Survey Report Safety Perceptions [LINK](#)).

Opportunity Area 10: Establish a Music Therapy Education Program that Provides Training Certifications or Accredited Credentials (p.49)

- Mount Royal University currently offers an introductory class on Music Therapy ([LINK](#)). Further courses could be implemented or a program developed as part of the MRU Conservatory program.
 - > (related, in Edmonton) St Stephen's College/University of Alberta offers CATS 381 Introduction to Music Therapy.
- Guidelines for becoming a Music Therapist are outlined on the Music Therapy Association of Alberta website: <https://www.mtaa.ca/become-a-music-therapist>
- The Music Therapy Association of Alberta along with the [Canadian Association of Music Therapists](#) are both key stakeholders regarding the development of music therapy as a professional practice. Events like [Continuing Education Day](#) could be important forums of dialogue where insights on music therapy education can be gained.

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 (p.63)

- The Calgary Office Revitalization and Expansion Working Group (CORE) [Final Report](#) (Updated May 2022), outlined four main priorities. Although their work reflects an ongoing focus on Calgary's downtown core, some of their suggestions may be adaptable to outside of downtown (e.g., they suggest mapping to determine the strategic placement of office conversions for affordable housing, student residence and cultural amenities—expand this mapping to inform planning and building in suburbs).
- The forthcoming CreativeCITY community engagement report highlights the need for a variety of multi-purpose (e.g., performance, practice, business etc.) spaces for Calgary's creative economy (music and many other creative pursuits).
- [cSPACE Calgary](#) is a multi-purpose facility dedicated to arts organizations and nonprofits, repurposed from a heritage building. They have performance spaces with equipment for musicians. cSPACE was built to address a lack of space and resources for creatives and non-profits on the edge of the city centre. The model could be used elsewhere, although, [heritage buildings in Calgary](#) are mostly smaller scale.
- Facilities like YMCA have spaces for [performing arts](#).
- Rec centres and community association buildings were identified as alternative performance/cultural spaces in the CreativeCITY community engagement process.
- Initiatives like [RISE UP Calgary](#) provided funding for arts and music activations outside of downtown in 2021.
- Identify the greatest needs present in suburban areas (e.g., beginner's classes, rehearsal space, etc.) and then focus on those.

Opportunity Area 23: Engage in Global Music City Conferences and Events (p.73)

- Calgary hosted a Music Cities Conference in 2022 during Chinook Blast <https://www.musiccitiesevents.com/music-cities-convention> – Music Cities Convention is the biggest global event exploring the use and importance of music in the development of cities all around the world.
- Speakers for the Music Cities Conference: <https://www.studiobell.ca/alberta-music-cities-convention-goes-virtual>
- Explore follow-up opportunities and consider how to get representatives from Calgary into future Music Cities Conferences elsewhere.

Opportunity Area 26: Develop an After-Hours Venue Permit with Regulated Late-Night Venues (p.80)

- Calgary conducted a festival and event strategy research project with public input. Responses from anonymous participants highlighted a desire for events and festivals to go beyond 10pm. ([LINK](#))
- Late-night venues can currently apply for a special permit for one time events. ([LINK](#))
- An outline of businesses requiring municipal licensing. ([LINK](#))

Opportunity Area 29: Host Music Export Seminars and Fairs (p.86)

- Calgary hosted the 2022 Music Cities Convention with Music Cities Events, West Anthem, National Music Centre and Alberta Music during Chinook Blast 2022.
- List of music conferences/festivals in Canada for a sense of Alberta's contribution. ([LINK](#))
- Calgary hosted the 20th BreakOut West Festival & Conference in 2022 ([LINK](#)), including career

development and sessions on music export.

- Consider more partners in this work (e.g., Western Canadian Music Alliance, Canadian Independent Music Association—see their BreakOut West trade mission [here](#)).

Opportunity Area 30: Further Expand and Build Upon the Roots of the SoundOff Summit (p.87)

- The [SoundOff Virtual Showcase](#) featured artists performing in several local venues: Broken City, The Grand, Ironwood Stage and Grill, King Eddy, Dickens Pub, and The Owl.
- Consider more partners in this work (e.g., Western Canadian Music Alliance, Canadian Independent Music Association).

Edmonton Opportunity Areas

Opportunity Area 4: Develop Edmonton Busking Guidelines (p.39)

- The City of Edmonton has not implemented any new busking guidelines since the publication of this report.
- The Edmonton Transit System (ETS) busking guidelines have been in place for busking on ETS property since 2015. [ETS Busker Program Terms & Conditions](#). “A business license for busking is not required. However, permission from ETS is required to busk on ETS property.” ([LINK](#))
- ETS has seen an increase in social disorder since the start of the pandemic ([LINK](#)). Consider how this may impact busking guidelines (and vice versa), especially around transit stations/areas. There may need to be coordination with ETS security.

Opportunity Area 7: Strategically Coordinate Festival Events, Dates and Plans, Allowing for More Engagement throughout the Year, Avoiding an Over Cluster of Offerings (p.44)

- The 2020 study suggested working with the Alberta Music Festival Association (AMFA), however, AMFA may NOT be the organization to coordinate festival event dates in Edmonton as they focus on 36 member festivals across the province of which Edmonton is only one (their festivals are music competitions).
- The City of Edmonton is a natural partner when it comes to coordinating festival dates because of its jurisdiction over the city’s public places, where many festivals are held and its ability to dictate when those spaces can be utilized. ([LINK](#))
- Multiple sources indicate strong attendance at 2022 summer festivals after pandemic-impacted events and cancellations in 2020/2021.
 - > “Heritage Festival is back to full capacity and then some at Hawrelak Park.” ([LINK](#))
 - > “Edmonton Fringe closes 2022 festival with strong crowds.” ([LINK](#))
 - > “Edmonton summer festival attendance booming, but charitable donations fall short.” ([LINK](#))
- Challenges in 2022: “From travel woes to inflation, music festivals face most unpredictable summer yet.” ([LINK](#))
- Festivals can attract a lot of funding, make a case for strategically timing/locating festivals to enhance/increase the impact of funding provided. (K-Days example [LINK](#) and [LINK](#))
- Coordinating/promoting the variety of festivals may also help in terms of tourism as visitors will see that they can easily plan trips that encompass multiple festivals.

Opportunity Area 8: Encourage Engagement in Musical Events, Performances and Showcases Through Transportation Reward Programs (p.45)

- The issue of increased ticket costs is exasperated due to recent inflation.
 - > Edmonton festivals ‘feeling the crunch’ of rising costs, work to break even in 2022. ([LINK](#))
- Edmonton is in the middle of expanding their pilot of [ARC](#), an electronic fare system for transit users that could serve as a platform for a transportation rewards program.
- In April 2022, ETS announced [Rediscover ETS](#) aimed at incentivizing transit ridership – transit users can access discounts/promotions with proof of fare.
 - > As of Sep 2, 2022 there is one promotion for 10% off at the TELUS World of Science listed on the website.
 - > ETS also ran social media contests with prizes that included tickets to museums, concerts, and festivals.
 - > “Edmonton transit campaign aims to entice riders with discounts for local attractions.” ([LINK](#))
 - > Overall significant progress has been made in this area, but there is potential for expansion and a permanent rewards program tied to festivals.

Opportunity Area 11: Initiate a Program Focused on Musical Scoring (film, television, and gaming) (p.50)

- MacEwan University’s website specifically mentions “film scoring” in its description of its music composition major for the Bachelor of Music in Jazz and Contemporary Popular Music. ([LINK](#))
- The Northern Alberta Institute of Technology’s (NAIT) Digital Cinema concentration features a Digital Post Production Sound Design course as one of its required courses. ([LINK](#))
- The University of Alberta’s Certificate in Computer Game Development includes the option to take an Introduction to Music Technologies course. ([LINK](#))
- NAIT’s Game Design Concentration descriptions states “Courses will also focus on developing story and audio” but does not mention music or musical scoring specifically. ([LINK](#))

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.66)

- Although delayed by the COVID-19 pandemic, Edmonton’s ICE district has continued to develop and grow.
 - > “5 years later, Edmonton’s ICE District keeps progressing.” ([LINK](#))
 - > More attractive local infrastructure (i.e. grocery store). ([LINK](#))
 - > A recent announcement of a year-round ‘Fan Park’ coming to the ICE District **including capacity for concerts.** ([LINK](#))
- Edmonton’s ICE district has worked to offer attractive programming throughout the year (e.g., TG ICE Fridays, summer SolstICE events). ([LINK](#))
- Recent sporting events such as [Play On](#) and Pride Cup have showcased successful daytime activations of the ICE District.
- Edmonton’s overall daytime music offerings are not robust, with only a handful of daytime (morning and early afternoon) music options.

Opportunity Area 24: Engage the Music Industry in Edmonton's Tourism Offerings and Expand Genre Promotion (p.75)

- Alberta's tourism industry took a hit during the pandemic and is still in the process of rebounding and recovering lost workforce.
- Edmonton's tourism focus is more on Edmonton as a [festival city](#) than a music city. There is an opportunity to lean into that while still highlighting and leveraging music.
- No notable examples of local Edmonton musicians (of any genre) being highlighted in tourism campaigns in recent years.

Opportunity Area 27: Organize and Promote Evening and Late-Night Transit Safety Strategies to Work in Conjunction with the Late-Night Transit Service (p.82)

- On November 23, 2022, ETS launched Transit Watch, allowing transit riders to text city dispatch workers directly for help. ([LINK](#))
- ETS committed to the following transit safety resources after a 78-year-old woman was attacked on a train platform at night in April 2022. ([LINK](#))
 - > Adding transit peace officers
 - > Adding opioid response teams
 - > Adding transit security dispatcher
- ETS website's [Safety and Security Travel Tips](#) hasn't been updated to include any proposed addition relating to a night-time safety strategy.
- Multiple sources indicate that late-night transit safety issues have become worse since the release of the West Anthem study.
 - > "According to city administration, perceptions of safety in Edmonton public transit fell from a record of 83 per cent in 2015 to 78 per cent in 2021. In 2021, between five and 12 per cent of riders felt unsafe." ([LINK](#))
 - > "It's not really safe': LRT safety concerns remain with daily users." ([LINK](#))
 - > "A safety and security report done by the City of Edmonton shows that there has been a 819 per cent increase in medical calls on ETS property since 2017." ([LINK](#))
 - > "Escalating crime on Edmonton transit leads to renewed calls for increased patrols." ([LINK](#))
- Edmonton City Council approved a new transit safety plan on February 24, 2022. ([LINK](#))
 - > The \$3.9-million plan pilots a three-year partnership between the city, Edmonton Police Service and the Bent Arrow Traditional Healing Society. The three will collaborate on expanding the Community Outreach Transit Team (COTT), created in 2021, and build on other work that was done that year.
 - > A joint safety operations team will be created under one command system made up of police, transit peace officers, community standards peace officers, Edmonton Fire Rescue Services, and outreach workers.
 - > The [Transit Safety Plan](#) does not specifically address late-night transit safety, but much of what it outlines has an impact on late-night transit issues.

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 (p.88)

- Indigenous Music West has launched ASKIY Export Residency¹ for Indigenous musicians in Western Canada. The program was developed by the Indigenous Music West program at Manitoba Music in partnership with Creative BC. ([LINK](#))
- Alberta Music is launching an Indigenous Development Program (IDP) in 2023. This is separate from ASKIY and funded by the Government of Alberta.
 - > The IDP aims to develop and invest in an Indigenous Community Outreach and Support Program. The goals of the ten-month project are to:
 - » To celebrate and elevate Indigenous artists and groups within Alberta and beyond.
 - » To ensure visibility of Indigenous creators beyond programming initiatives around National Indigenous Peoples Day and National Day of Truth and Reconciliation.
 - » To minimize barriers for Indigenous people to access Alberta Music or its programs, its stakeholder programs and other funding bodies, and to receive the support needed to grow their careers.

Provincial Opportunities

Opportunity Area 1: Position West Anthem as the Music Advisory Council Representing Alberta's Music Sector (p.33)

- The Steering Committee of West Anthem currently has representation from both Calgary and Edmonton including the National Music Centre, Edmonton Downtown Business Association, Alberta Music, and Tourism Calgary: <https://www.westanthem.com>
- West Anthem successfully received and then distributed \$60,000 to support venues and artists in downtown Edmonton in 2022. A second application was submitted and we're awaiting responses—this supports West Anthem's work (and reputation) as an advocate for the music industry across Alberta.

Opportunity Area 2: Create Routine All-Ages Events and Venues (p.35)

- There's no indication of movement in this opportunity area. The City of Calgary's Festival and Event Manual ([LINK](#)) and The City of Edmonton's Festival and Event Planning webpage ([LINK](#)) don't make mention of all-ages events or venues.
- A few organizations have web pages dedicated to their all-ages programming, events, and venues, but not many could be found (Sled Island [LINK](#), Twisted Element [LINK](#), All Ages YYC [LINK](#)—not active since before the COVID-19 Pandemic).
- There is concern about exposing kids and youth to illicit substances at all ages venues and concerts.
 - > The City of Calgary's Festival and Event Manual speaks to limiting the impact on youth in the context of cannabis consumption areas.
- In 2013, the B.C. Liquor Control and Licensing Branch (LCLB) banned dozens of liquor-serving establishments from hosting all-ages events.
 - > "BC to ban all-ages events at several bars and nightclubs." ([LINK](#))
 - > "All-ages events threatened by B.C. liquor board's new rule." ([LINK](#))

1 <https://www.indigenoumusic.ca/news/read,article/8265>

- > Temporary alteration of terms and conditions for all-ages events in liquor primary establishments ([LINK](#)) showcasing the importance of partnering with the AGLC on all-ages policy in Alberta.
- The above point showcases the importance of partnering with the AGLC on all-ages policy in Alberta.
- Civic initiatives that might promote an all-ages approach: Calgary’s [Age Friendly Strategy](#) (seniors focused), [Age Friendly YEG](#) (seniors focused) and [Child Friendly Edmonton](#).

Opportunity Area 5: Work with LGBTQ2+ Communities to Increase the Overall Opportunities through Music Diversity Groups, Events and Mentorship Programs (p.40)

- Music partners and programs should partner with LGBTQ2+ support groups (e.g., Skipping Stone [LINK](#)).
 - > A Calgary example includes the 2021 “Pride in Music” partnership between RISE UP Calgary, Calgary Pride and Scotiabank Backbeat presenting a series of Calgary’s queer musicians at the Studio Bell. ([LINK](#), [LINK](#), [LINK](#))
- The national music festival “Play the Parks” (2022) prominently featured LGBTQ artists: <https://www.tdmusicconnectedseries.com/play-the-parks>—building off the spirit of Play the Parks, a more structured program of established music partners collaborating with diverse communities could be a way to give LGBTQ2+ artists the necessary channels of support.
- There are examples of local organizations and societies featuring musicians from the LGBTQ community. (e.g., The Calgary Queer Arts Society [LINK](#), The Alberta GSA Network lists LGBTQ musicians, [The Q](#)). Important to note two-spirit is not always recognized within their copy.

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.42)

- Regarding outreach to the LGBTQ2+ community, collaborate with organizations that provide mentorship programs and resources such as [Calgary Outlink](#) and [Pride Centre of Edmonton](#). Engage groups at post-secondary and trade institutions.
- [Making Space](#) is a virtual peer mentorship program focusing on the needs and wants of early-career BIPOC artists. They host three monthly events and operate through an ongoing community Slack page where artists share their work, questions, and resources that they feel may benefit artists in the collective.
- The TD Incubator program based out of Arts Commons prioritizes artists from communities who reflect the diversity and vibrancy of Treaty 7 territory ([LINK](#)), providing networking, professional development, mentorship, and performance and exhibition opportunities (mix of artists and artistic practices, not all music).
- Creatives Empowered is a virtual non-profit collective of BIPOC artists + creatives. They are the first and only organization of its kind in Alberta ([LINK](#)). A lot of their resources pertain to the film industry, but there is an opportunity, with the right partners, to offer more music-based career training and resources.
- Alberta Music has compiled grant and sponsorship opportunities aimed at Indigenous, BIPOC, and LGBTQ+ artists on its website. These grants include professional development opportunities, travel grants for Indigenous communities, microgrants, production grants and more. ([LINK](#))

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) (p.47)

- The Banff Centre for Arts and Creativity implemented a collaborative program for Indigenous musicians. The Indigenous Classical Music Gathering (ICMG) is led by faculty members and is a program that gives space to Indigenous classical musicians and composers to explore authentic, experimental forms of music and to produce their work ([LINK](#)) (this also relates to Opportunity Area 6).
- The National Music Centre at Studio Bell has an Indigenous Programming Advisory Committee to “inform programming opportunities as they relate to Indigenous content and help NMC collaborate with and create space for Indigenous voices.” This is an example of integrating Indigenous music and perspectives into programs and programming. ([LINK](#))
- Organizations like the [Alberta Registered Music Teachers Association](#) could collaborate with Indigenous organizations like the [Alberta Native Friendship Centres Association](#) to deliver Indigenous music-based events and programs.

Opportunity Area 12: Provide Musicians with Development and Education Opportunities Surrounding Modern Career Development (p.53)

- Alberta Music has several programs for supporting professional development including: DOWNLOAD¹ offers expert-led training sessions; LIVESTOCK covers a range of showcasing opportunities for artists; and Project WILD educates, develops, promotes, and launches the careers of Alberta’s up and coming country and roots artists. ([LINK](#))
- Professional development skills are advertised in the four-year degree and two-year diploma programs of
 - > MacEwan University ([LINK](#))
 - > University of Calgary ([LINK](#))
 - > Ambrose University ([LINK](#))
 - > University of Alberta ([LINK](#))
 - > Alberta University of the Arts provides certificates in “Entrepreneurship” ([LINK](#)) and “Management and enterprise” ([LINK](#)) that connect creative professionals to the business world to learn how to express and capitalize on their vocation more effectively (however, not specifically geared toward music professionals).
 - > A program audit of these programs regarding their focus on professional/career development could be done to identify any gaps.

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 (p.55)

- Currently, no dedicated long-term artist program specific to professional development exists in the major institutions. Short-term music entrepreneur programs are run through local music venues such as the National Music Centre ([Artist Entrepreneur West Program](#)).
- The implementation of a long-term artist program could be an opportunity for institutions like [Mount Royal University](#) that have a conservatory but no music degree or diploma.

1 <https://www.albertamusic.org/programs/download/>

- The Banff Centre's [Banff Musicians in Residence](#) program provides space and focused time for an extremely limited number of musicians of all genres to concentrate on artistic development while working on individual or collaborative projects over a 12 month period.
 - > An expansion of this program or a similar iteration with room for a larger number of musicians to participate would be an ideal realization of this opportunity area.

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 (p.56)

- There currently exists a short-term professional development program for musicians at the National Music Centre. The five-week-long [Artist Entrepreneur West Program](#) teaches emerging musicians from all genres to build sustainable businesses and careers in music. A support network could supplement this program for a further 12 months.
- MacEwan University announced a unique initiative in 2022 focused on developing country artists by bringing distinguished country music artists to the university to engage in education and mentorship of students. ([LINK](#))
- [Project Wild](#), a country artist development program (collaboration of Alberta Music and WILD 953 - Calgary's New Country) may offer an artist development template that can apply across musical genres.

Opportunity Area 15: Implement and Distribute a 'Fair Pay' Program to Properly Compensate Artists (p.59)

- In 2021, the Alberta Government proposed Arts Professions Recognition Act (Bill 75) to “endorse the importance of contracts when engaging artists for services and will ensure artists are paid fairly, say, government officials.” ([LINK](#))
- This piece of legislation primarily focuses on the “economic and contractual rights” for artists and “models the way for private and non-profit employers and contractors in Alberta’s economy, and helps legitimize the professional nature of artists’ work.” ([LINK](#))
- Consider [Calgary Musicians Association](#) and [Edmonton Musicians Association](#) as potential partners.

Opportunity Area 16: Facilitate Permitting and Temporary Activation of Empty Buildings and Spaces to Create Cultural Offerings For Youth, Artists And Musicians (p.61)

- Calgary currently has many vacant spaces in the downtown area. This is an opportunity for the city to permit and activate these empty spaces to create cultural offerings for youth, artists and musicians.
 - > Calgary downtown vacancy rate of 32.6% at end of Q4 2022. ([LINK](#))
 - > The city has taken steps to repurpose vacant downtown offices into residential buildings. ([LINK](#))
 - > From 2018 – OPINION “Why we should turn Calgary’s empty office towers over to the creative economy.” ([LINK](#))
 - > The City of Calgary is moving \$350,000 into research in partnership with the University of Calgary meant to guide a rejuvenation of Calgary’s downtown. ([LINK](#))
- Interesting Edmonton example of activating empty storefronts with arts-based activities ([LINK](#)). It was a collaboration between [Arts Habitat Edmonton](#) & the MacEwan University Social Innovation Institute.

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.63)

- An increase of insurance rates may be an additional strain on operations for small music venues. ([LINK](#))
- The Evan Hazell Theatre at the Brookfield Residential YMCA in Seton and the BMO Theatre at the Shane Homes YMCA in Rocky Ridge are examples of purpose-built performance spaces constructed outside of Calgary's core: explore their usage and success.
- The City of Calgary and Calgary Arts Development's [Building on our Momentum: Arts and Culture Infrastructure](#) strategy outlines hypotheses for lack of uptake for art spaces incentives from developers as well as tactics on how to potentially resolve this. (pages 30 & 31)
- Artist-run hubs like cSPACE and NVRLND in Calgary are very different, but strong examples of creative re-development to build creative spaces.

Opportunity Area 20: Create a "This Is Alberta" Playlist on Streaming Channels, Promoted through Tourism Departments (p.68)

- There is potential for collaborations with community radio stations that play and promote local artists (e.g., [CKUA](#), [CJSW](#), [CJSR](#), [CJWE](#), and others).
- Alberta Music created a playlist featuring local artists ([LINK](#)), more playlists for local artists of different genres could be created.
- Artists and music venues could also promote playlists.
- See an "Alberta: Music Playlist" suggestion on TripAdvisor. ([LINK](#))

Opportunity Area 21: Offset the Costs of Booking International Artists by Drawing in Musicians to Record in Alberta through a Reimbursement Program (p.70)

- The Alberta Foundation for the Arts provides a [Music Individual Project Funding](#) where "funding provides up to \$15,000 to support the development of individual Alberta artists, arts administrators, or an ensemble of artists by providing funding for a specific music project."
- In 2021, [Alberta Music](#) provided individual and business microgrants, however, these funding programs were limited to Alberta residents.
- It could be worth looking into Alberta's booming film industry and associated tax credits/incentives to see if the province has seen an increase in associated music production and scoring for film/tv locally.
 - > This is an area where traction can be made policy-wise to bring music into the fold as the province has showcased its willingness to support film industry with incentives.

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.72)

- In 2022 the federal government announced "\$10 million to expand inclusive programming and support initiatives ensuring the future sustainability of Edmonton's K-Days and more than \$7.5 million to help 29 tourism projects enhance tourism experiences to attract more visitors to Alberta." See it in [Prairies Economic Development Canada](#).
- In April 2022 the provincial government announced a \$63 million "boost to Travel Alberta's budget will

help accelerate the tourism industry’s recovery.” (article [LINK](#))

- In the Calgary music tourism scene, the [National Music Centre](#) made investments to renovate the King Eddy’s rooftop space, creating a safe outdoor space during the pandemic with the help of grants.
- Tourism Calgary has not released a follow up to its 2018-2020 strategy.
- Calgary released its Winter City Strategy in November 2022 ([LINK](#)) while Edmonton’s winter city strategy came out in 2012, with an evaluation and report in 2018 ([LINK](#))—explore these for alignment with music tourism.

Opportunity Area 25: Organize the Creation of a Night-time Operations Office and Advisory Board (p.77)

- Expressions of support for this in Edmonton: [Edmonton needs a nighttime economic strategy, industry advocates say](#)
 - > Further: [‘Night mayor’ could help Edmonton boost restaurant, entertainment industry](#)
- The development of a night-time economy is outlined as a priority in the [“Calgary in the New Economy”](#) report by the Calgary Economic Development.

Opportunity Area 28: Establish a Stronger Local Music Export Offering, Including Increased Export-Ready Programming and Enhanced Promotion of Existing Opportunities (p.84)

- Alberta Music’s “Passport” program provides training, networking opportunities, mentorship and more for artists, artist managers, and music companies doing business internationally or is “export ready.” ([LINK](#))
 - > Their Alberta Focus showcase puts Alberta’s finest, export-ready artists in front of international music industry professionals from the US, Australia, Germany, and markets across the UK.
 - » 2022 Call for Submissions: <https://www.albertamusic.org/2022/06/9877/>
- The ASKIY Export Residency is a new opportunity for Indigenous artists in Western Canada to focus on music business and career development. ([LINK](#))
- Alberta Music is an active partner in this opportunity area. Look at how their forthcoming Indigenous Development Program (IDP) may serve this priority. Also consider more partners in this work (e.g., [Western Canadian Music Alliance](#), [Canadian Independent Music Association](#), etc.)

Appendix B:

Opportunities for Tourism Growth: Strategic Partnering between Travel Alberta and Alberta's Music Industry

Travel Alberta has a laudable plan to return to 2019 tourism levels by 2024. Building back the tourism industry presents an opportunity to build the sector back intentionally and robustly. The music sector is positioned to help bring tourism back in a big way. Music tourism represents an exciting and growing segment of the tourism market¹. Strategic alignment between tourism, music and other creative industries is seen in many provinces and territories across Canada (e.g., British Columbia², North West Territories³, and Ontario⁴, to name a few).

Music tourism can be leveraged to draw in visitors and their tourism dollars. Benefits of music tourism include revenue from concerts and festivals as well as merchandise, and money spent on hotels, transportation, and restaurants⁵. Additional jobs are created in hospitality, tourism, and the music sector to meet the demand of music tourists. Not to mention, people travelling to Alberta for music will then be here to experience the full range of other experiences on offer in Alberta's tourism toolkit. In short, "music is a reason people travel."⁶ There is tremendous growth potential in *Travel Alberta pursuing intentional, meaningful, and sustained collaboration with the music industry in Alberta to bring tourists to our beautiful province.*

Opportunities for Travel Alberta to consider for quick wins, medium-term collaborations, and long-term visioning are proposed.

Travel Alberta can begin this important work right away by securing the following quick wins within the next 6 months:

1. Set up Terms of Reference for working with, and including, the Alberta music sector in relevant Travel Alberta activities such as strategic planning and marketing. Sector leaders could include Canada's National Music Centre, West Anthem, and Alberta Music, among others.
2. Work with and include the Alberta music scene in the tapestry of Travel Alberta's marketing strategy, brand strategy, and accompanying assets:
 - Highlight world-class music events around the province such as the Edmonton Folk Music Festival and Calgary's Sled Island Music and Arts Festival.

¹ Music is the New Gastronomy: White Paper on Music and Tourism – Your Guide to Connecting Music and Tourism, and Making the Most Out of It (2018). Retrieved from: <https://static1.squarespace.com/static/6196988346950471baa32d7d/t/6261927ad605ae5210328b03/1650625511847/SOUND+DIPLOMACY+-+Music+Tourism+White+Paper.pdf>

² BC Music Strategy (2016). Retrieved from: <https://musiccanada.com/wp-content/uploads/2016/02/BCs-Music-Sector-From-Adversity-to-Opportunity.pdf>

³ NWT Arts Strategy 2021-2031 (2021). Retrieved from: https://www.nwtarts.com/sites/nwtarts/files/nwt-arts-strategy-2021-2031_1.pdf

⁴ Vision for Ontario's Live Music Industry (2022). Retrieved from: <https://www.ontario.ca/document/vision-ontarios-live-music-industry/promotion-and-marketing#section-2>

⁵ Mastering of a Music City (2015). Retrieved from: <https://musiccanada.com/wp-content/uploads/2015/06/The-Mastering-of-a-Music-City.pdf>

⁶ Music is the New Gastronomy: White Paper on Music and Tourism – Your Guide to Connecting Music and Tourism, and Making the Most Out of It (2018). Retrieved from: <https://static1.squarespace.com/static/6196988346950471baa32d7d/t/6261927ad605ae5210328b03/1650625511847/SOUND+DIPLOMACY+-+Music+Tourism+White+Paper.pdf>

- Feature Albertan musicians and venues on the front page of the Travel Alberta website (e.g., dramatic concert images). Explore creating a music-driven itinerary for the website, as well as creating travel offers that compliment musical venues, events, and festivals.
- Incorporate Albertan music and music events into content on social channels to highlight the outstanding musical talent in Alberta (e.g., catchy and local music for short videos; b-roll footage from local music festivals, exciting musical acts, and/or unique venues). Where appropriate, tag musicians and venues to promote them and have their audiences discover Travel Alberta's channels.
- Expand on the music programs featured at, and continue to work with, Alberta's major international airports to feature diverse artists, and highlight musical events and tourist attractions around the province. Consider interweaving music and film to create Alberta Short Films to play in the terminals - similar to Atlanta's successful program with the Atlanta Film Society: Airport Shorts¹.

Over the next 6-12 months, Travel Alberta should explore and collaborate with relevant partners from the music sector, programs that can benefit cultural tourism in Alberta:

1. Create additional grants for marketing, advertising, and promoting smaller-scale music festivals, venues, and events. Smaller venues and events often don't have large (or any) marketing budget. Santa Fe has seen success with their Creative Marketing Fund² subsidizing the relatively small marketing and promotional budgets of grassroots festivals and events, allowing them to draw greater numbers of visitors.³
2. Work intentionally, meaningfully, and collaboratively from the start, in a good way to identify and partner with Indigenous, Métis, and Inuit musicians and music professionals in Alberta to develop, compensate, and market musical offerings. This partnership would reflect the spirit of Alberta and can draw tourists from across North America to learn more about the land and First Peoples of Alberta. Extend this work to include BIPOC musicians and music professionals generally, as well as people from the LGBTQ2S+ community.
3. Explore creating an internship or grant program related to the emerging fields of entertainment and music tourism in collaboration with interested provincial post-secondary institutions and the National Music Centre in Calgary, for example.
4. Put out an RFP to design an interactive event map of Alberta. For the pilot, focus on music specific events, with the intention it could expand to other creative and cultural events over time. The map would allow people to explore music events and festivals by genre, date, location, accessibility, audience age, etc. This can double as a resource for local hotels and restaurants to share or play off of nearby events. Pre-designed maps could be created to show "music trails," as well as other itineraries, through various regions of the province.
5. To bring awareness to our local music scene to international travelers, work with local tourism agencies to leverage large tourism events in Alberta, and invest in templated music activations to showcase the local and provincial music ecosystems. For example, OFF-COUNTRY Music Festival successfully showcased the local music scene and venues when the Canadian Country Music Awards were in Calgary this past fall.
6. Work with West Anthem to adopt an ecosystem approach to align and adopt a synergistic approach between music tourism, municipal tourism strategies, and the overarching provincial tourism strategy.

¹ Airport Shorts (nd.) Retrieved from: <https://www.atlantafilmsociety.org/airport-shorts-5>

² Cultural Organizations Arts Grants (2022). Retrieved from: <https://santafenm.gov/arts-and-culture-department/cultural-organizations-arts-grants-refresh-2022>

³ CreativeCITY: Prosperity through the Creative Economy (2021). Retrieved from: <https://calgaryartsdevelopment.com/wp-content/uploads/2021/06/BirdCreatives-CreativeEconomyStrategy-June212021.pdf>

Finally, over the next 12-24 months, Travel Alberta should work with the music sector in Alberta to:

1. Stay current on and provide feedback related to the development of the Night Time Economy Strategies that are gaining traction in Edmonton and Calgary. Travel Alberta can explore ways to specifically support this important and profitable segment of the tourism market.
2. Imagine and innovate with the music and tourism sector to create a signature cultural or entertainment tourism draw to the province. Internationally recognized music festivals and iconic venues can drive tourism. Work with current Alberta-based promoters to explore whether and how Alberta could promote a current venue or festival or create a new one that would be Alberta's musical "calling card" to the world.
3. Include the music sector in long-term business and economic planning to envision making Alberta Canada's premiere music and entertainment tourism destination, further diversifying and driving our economy.

A budget of \$4.5 million dollars over the next three years dedicated to aligning and implementing strategic programs between tourism and the music industry would allow for quick wins, opportunities to build momentum, and time for long-term planning and visioning. Important work in creating music city strategies for Edmonton, Calgary, and the province is already underway and will be a major catalyst in this work. The opportunity to drive the economy in such a collaboration, and to enhance, celebrate, and grow the livelihoods of Albertans, should not be missed.

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Appendix B:

Investing in Music:

Strategic Opportunities for the Alberta Ministry of Culture

Music, the universal language of the human experience, connects us, heals us, and defines us. It's also big business. Global revenues from recorded music were US\$25.9 billion in 2021—an increase of 18.5% over 2020¹. It's an industry that can keep growing without compromising people or the planet. With music, Alberta has an opportunity to further diversify and drive our economic base while also celebrating, enhancing, and creating livelihoods for more Albertans. Several investment opportunities are proposed.

Establish an Alberta Music Fund: \$20 million over 3 years

Other provinces have invested extensively in their music industries to great effect. Created in 2013, the Ontario Music Fund provided \$15 million a year to support music in Ontario and was made permanent in 2015². British Columbia, in direct response to the losses being felt to Ontario's music industry, created Amplify BC in 2018 to support B.C.'s music industry. Based on Amplify BC's early success, where a \$7.5 million investment in the first year stimulated \$29.9 million in expenditures, supported 3,256 jobs, including 295 new hires to B.C. music companies, and generated a 1:3 economic return, the program received renewed funding in 2021 with \$22.5 million over 3 years³.

A significant investment in Alberta's music industry, particularly focusing on Albertan musicians and artists, music companies, live music, and the development of the music industry would help to ensure Alberta's music industry continues to grow, to thrive, and to further diversify the economic fabric of Alberta. Such an investment would support the creation of new jobs as well as help attract and retain talent in other sectors as a thriving music ecosystem helps create more livable cities. Finally, such an investment would signal that Alberta is here to play, and is committed to being a destination for music and internationally competitive. This funding could be used for programs and initiatives at the local level that can elevate Alberta's music ecosystem nationally and internationally, such as:

- Career development programs in the music industry
- Programs to support live music across the province
- Programs to link Albertan musicians and sound recording professionals to film and television being made in Alberta⁴
- A music business incubator to increase the chance of success for Alberta music companies⁵
- Support for existing advocacy efforts and new programs that focus on making the music industry inclusive and accessible to women and BIPOC artists and entrepreneurs
- Activation of the provincial Music City strategies to be completed in 2023
- Inclusion of evaluation, survey, and reporting mechanisms to ensure programs are delivering value
- Support for collaborative and complementary programming across many of the existent assets in the Alberta music ecosystem such as Edmonton Folk Fest, Calgary Folk Fest, the Banff Centre for the Arts, the National Music Centre, Albert Music and West Anthem

1 IFPI Global Music Report (2022). Retrieved from:

https://www.ifpi.org/wp-content/uploads/2022/04/IFPI_Global_Music_Report_2022-State_of_the_Industry.pdf

2 <https://news.ontario.ca/en/release/33241/making-the-ontario-music-fund-permanent>

3 Amplify BC 2018-19 From Idea to Implementation (nd.). Retrieved from: <https://drive.google.com/file/d/1o0oRpWqOT9nT41deZQfYpK8EwejWtASx/view>

4 An example is RBC Music's [Music Video Production Project](#) which promotes the intersection of emerging Canadian Recording Artists and Filmmakers through Music Video Production Grants

5 Creative Saskatchewan Inc. (nd.) Retrieved from: https://www.saskmusic.org/uploads/document/document_file_1.pdf?t=1369174720

Create a Travel Alberta Music grant program: \$4.5 million over 3 years

Music tourism can be leveraged to draw in visitors and their tourism dollars. Benefits of music tourism include revenue from concerts and festivals as well as merchandise, and money spent on hotels and restaurants¹. Additional jobs are created in hospitality, tourism, and the music sector to meet the demand of music tourists. In short, “music is a reason people travel.”² There is tremendous potential in Travel Alberta pursuing intentional, meaningful, and sustained collaboration with the music industry in Alberta to bring tourists to our beautiful province. Opportunities to bolster the music industry in Alberta include:

- Working with Travel Alberta to weave music into the tapestry of marketing and promotion by:
 - » Adding music from Albertan musicians to Travel Alberta’s digital assets and marketing
 - » Further developing, supporting, and promoting the successful live music programs at Edmonton and Calgary International Airports
 - » Developing an interactive music map helping visitors (especially high spending international visitors) maximize their musical entertainment opportunities whenever and wherever they visit in Alberta
- Collaborating with, and supporting, the music industry on trade missions and other talent exchange opportunities to create and strengthen connections with international tourism markets such as Edmonton’s sister city, the original Music City, Nashville, Tennessee, or bring visitors to the National Music Centre in Calgary

Support an Alberta Music Tax Incentive or Tax Credit Program: \$9 million over 3 years

- Subsidizing property tax for venues that program live music. Administer through municipalities, similar to Toronto’s program launched in 2020 to reduce property taxes by 50% for Creative Co-Location Facilities (one of the first interventions of its kind in the world)³
- Tax credits and incentives for Alberta-based music-related activities such as those found in other creative sectors (i.e., the film industry, digital gaming, etc.)
- Address the increasingly high cost of insurance at music venues by
 - » providing tax credits to music venues and/or implementing legislation around the cost of insurance premiums for these venues
 - » Working with insurance providers and professionals in the music industry to create a check-list of safety and environmental protocols that can demonstrate compliance with safety and result in reduced insurance rates
 - » Government grants for self-insurance pool for small community venues
 - » Work with AGLC, small brewers, Alberta cannabis association, venues, and local events towards legislation that allows for mutually beneficial and safe collaboration that is economically beneficial to all partners around events and festivals

1 Mastering of a Music City (2015). Retrieved from: <https://musiccanada.com/wp-content/uploads/2015/06/The-Mastering-of-a-Music-City.pdf>

2 Music is the New Gastronomy: White Paper on Music and Tourism – Your Guide to Connecting Music and Tourism, and Making the Most Out of It (2018). Retrieved from: <https://static1.squarespace.com/static/6196988346950471baa32d7d/t/6261927ad605ae5210328b03/1650625511847/SOUND+DIPLOMACY+-+Music+Tourism+White+Paper.pdf>

3 Report for Action: Proposed City of Toronto Support for Live Music Venue Insurance (2021). Retrieved from: <https://www.toronto.ca/legdocs/mmis/2021/ec/bgrd/back-groundfile-164898.pdf>

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