

SOUND
DIPLOMACY



INDY MUSIC STRATEGY

MUSIC ECOSYSTEM ASSESSMENT
& STRATEGIC PLAN 2021-2023

November 2020

FOREWORD

Dear Indianapolis,

You have amazed us with your resilience, dedication and collaborative spirit throughout this research process. When we came to Indy for the Music Cities Forum in Indianapolis back in 2018, we witnessed so many brilliant minds, which inspired you to form the Indy Music Strategy Committee soon after with the goal to advance the study you are reading right now.

After 17 months of work over three project phases, we are proud to finally share this comprehensive music strategy for Indy, the first of its kind in Indiana. It would have not been possible without the tireless effort and support from the Indy Music Strategy Committee, its partners and sponsors, and everyone who contributed in some way, including the +1000 respondents who completed the Indy Music Survey last Fall. Thank you, all of you.

We were impressed to see how quickly Indy's music ecosystem became organized when the COVID-19 pandemic hit, its sectors and artists determined to place music at the forefront of the recovery agenda. The Arts Council offered support readily through the #IndyKeepsCreating grants, and the Mayor's Office recently launched the Music Cities Strategy Recovery Program, two progressive actions yet to be replicated in other U.S. cities. We know Indy has the strength, the tools and the determination to recover and shine brighter than ever before, and we're confident this three-year plan will support this.

Lastly, this strategy and its recommendations have been designed through a collaborative approach with inclusion at the very core of it. Now more than ever, Indy needs to promote the rich and untold story of its music heritage and increase the access and opportunities available in music for women, people of color, the Latinx community, differently-abled persons, underaged youth, the LGBTQI+ community and any other discipline, genre or positive form of expression. It is the only future we imagine for Indy's music ecosystem.

Indy is a must-visit music city in the U.S., and we are excited for the rest of the world to learn about it.

Shain Shapiro, PhD
Founder & CEO, Sound Diplomacy



Front Cover Photos: Visit Indy & Austin Friedline
Back Cover Photo: Visit Indy

A sign above the entrance to local jazz hangout Henri's in the 1950s read, "Through These Portals Pass the World's Finest Musicians." What was true then is still true today of the musical culture of Indianapolis.

From the mid-century jazz sounds of Wes Montgomery, Freddie Hubbard, and Larry Ridley along Indiana Avenue to today's eclectic mix of hip-hop, Americana, and more in Fountain Square and beyond, Indy punches above its weight class in musical influence. But much like the humble nature of our citizens, our music culture remains an underrepresented narrative of the creativity of our people and our global influence.

The Indy Music Strategy began as a means to better understand our music ecosystem and the impact it brings to our economy. Its findings illuminate pathways to advocate for and grow this important industry. While COVID-19 has disproportionately affected our music and event venues over the last several months, this strategy lays the groundwork for these cultural institutions to emerge from the pandemic stronger than ever before.

I remain committed to the vitality of Indy's thriving arts community and will work alongside our local arts, business, and tourism partners to showcase Indy as the world-class music city we know it to be.

Joseph H. Hogsett
Mayor of Indianapolis



ABOUT THE PROJECT

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

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

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

everywhere from management and music production, grassroots venues and instrument stores, music industry programs and knowledge sharing platforms.

The present strategy for the music sector considers the preexisting challenges that have been aggravated by the consequences of COVID-19 and leverages the opportunities and strengths that will remain in place after the crisis to ensure Indianapolis emerges from the crisis as a world-class music city in three years time. We're excited for what lies ahead on Indy's sound path to success as a music city.



Photo: Visit Indy

METHODOLOGY

Sound Diplomacy deployed its unique four-step methodological approach to deliver a comprehensive assessment of Indy's music ecosystem.

ECOLOGICAL ASSESSMENT

At the beginning of the research process, we articulated a vision to identify how Indianapolis' music ecosystem and its stakeholders can be best supported from the bottom-up and the top-down. We did a regulatory assessment (an in-depth exploration of current local policies impacting music) and a benchmarking of Indianapolis against like-minded cities in the U.S. and abroad.

STAKEHOLDER ENGAGEMENT

We conducted expert interviews, roundtable discussions and launched an online survey. In total, 1,052 people responded to the online survey. Over 140 people were interviewed online and during two visits to Indianapolis in July and October 2019 as part of the research process.

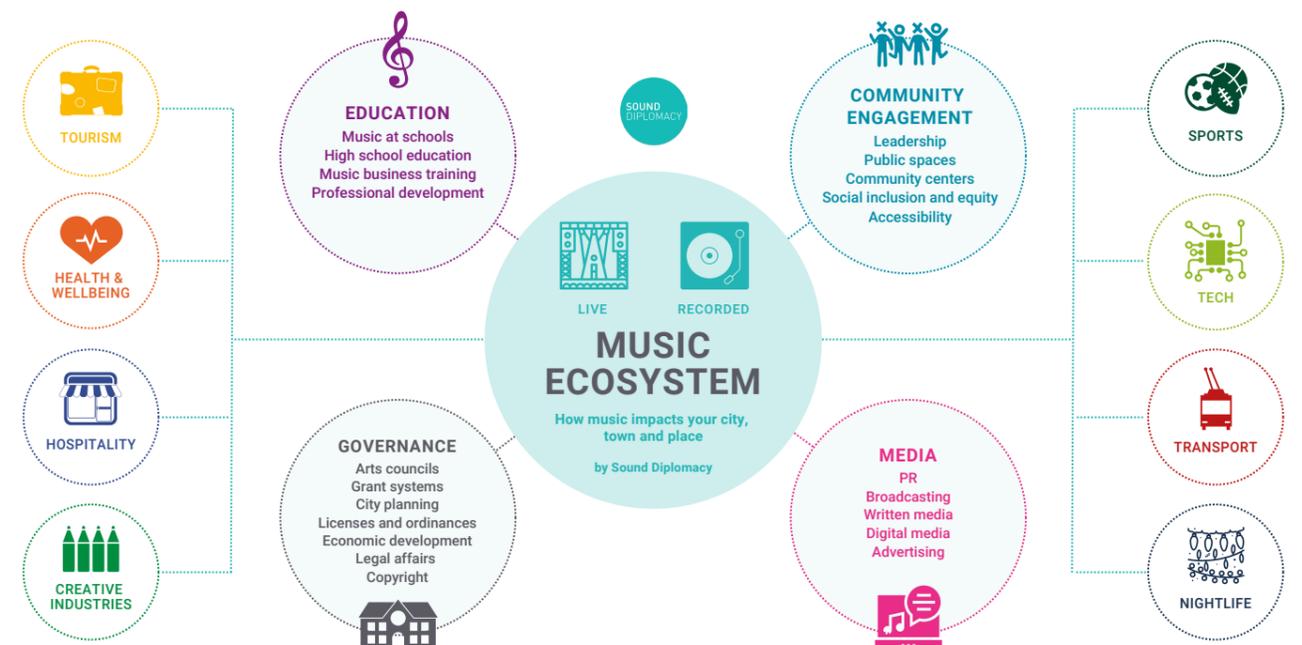
ANALYSIS OF FINDINGS AND RECOMMENDATIONS

A comprehensive plan for the development of the Indianapolis music ecosystem based on the analytical work previously completed.

QUANTITATIVE RESEARCH

Analysis of official statistics, primary data developed by Sound Diplomacy and results from the survey enabled an in-depth study of the economic impact of the music ecosystem in Indianapolis and a mapping of music infrastructure including music spaces, festivals and music education facilities.

The music ecosystem encompasses all people, assets, infrastructure, work and features of the city that feed into or interact with music. This includes community engagement, education, governance and media, and is also connected to tourism, health and wellbeing, hospitality, the creative industries, sports, tech, transport and nightlife. Below is Sound Diplomacy's infographic that depicts exactly the impact that a complete music ecosystem has.



ECONOMIC IMPACT SUMMARY



Photo: Visit Indy

The economic impact analysis provides a reliable measure of the economic importance of the music ecosystem in the local economy on three different scales: direct, indirect and induced impacts.

DIRECT ECONOMIC IMPACT

The economic activity directly connected to the music ecosystem, such as musicians, agents, and venues.

MUSIC ECOSYSTEM OUTPUT

All produced goods and services of the music ecosystem in Indianapolis. For example, concert tickets sales, recording studios services, etc.

INDIRECT ECONOMIC IMPACT

The supportive activity of the suppliers of the music ecosystem. It is related to local businesses that provide goods and services, such as advertising, transportation, and legal affairs.

GROSS VALUE ADDED (GVA)

The music ecosystem output minus music ecosystem intermediate consumption (the costs of all inputs, for example, backline rented by a live music promoter).

INDUCED ECONOMIC IMPACT

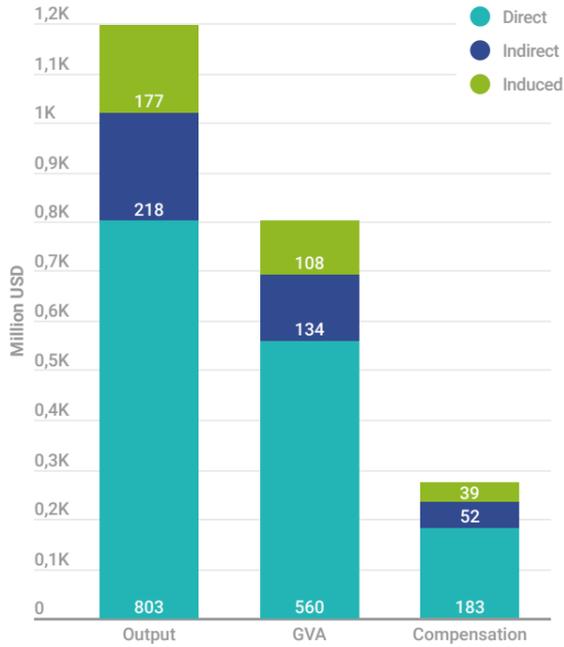
The result of the workers of the whole music ecosystem spending their wages on food, transportation, entertainment, etc. in their daily life.



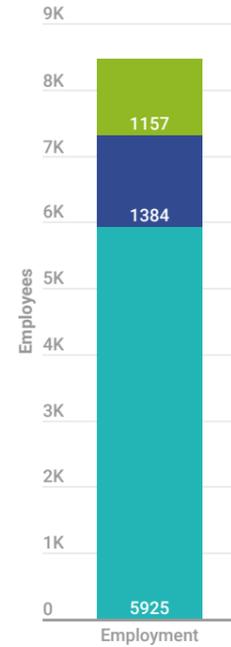
Photo: Arts Council of Indianapolis

ECONOMIC IMPACT SUMMARY

ECONOMIC IMPACT (IN MILLION US DOLLARS)



EMPLOYMENT IMPACT (NUMBER OF JOBS)



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

MUSIC ECOSYSTEM

Indianapolis' music ecosystem is responsible for generating a total output of \$1.19 billion, and a Value Added (GVA) of \$802 million to the local economy annually.

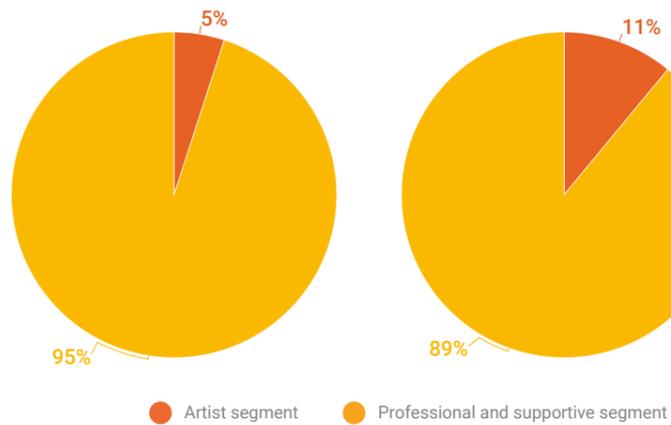
The total number of direct jobs generated and supported by the music sector in the area is 8,467 (1.85% of employment in the city). These people's earnings add to \$275.95 million.

MUSIC ECOSYSTEM EMPLOYMENT & OUTPUT

The Artistic & Creative Segment groups the artists, musicians, creators, and songwriters.

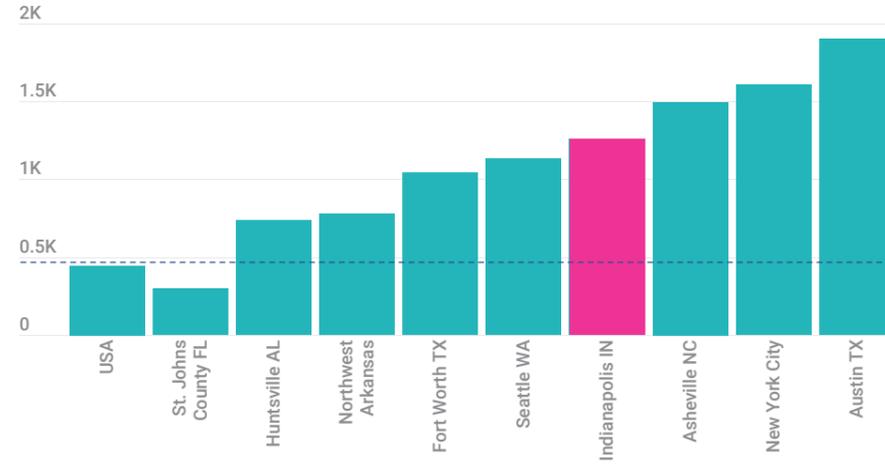
The Professional & Support activities include music-related businesses such as manufacturing, publishing and distribution, managers and agents, music venues, radio broadcasting, and music education.

MUSIC ECOSYSTEM DIRECT EMPLOYMENT & OUTPUT BY SEGMENT



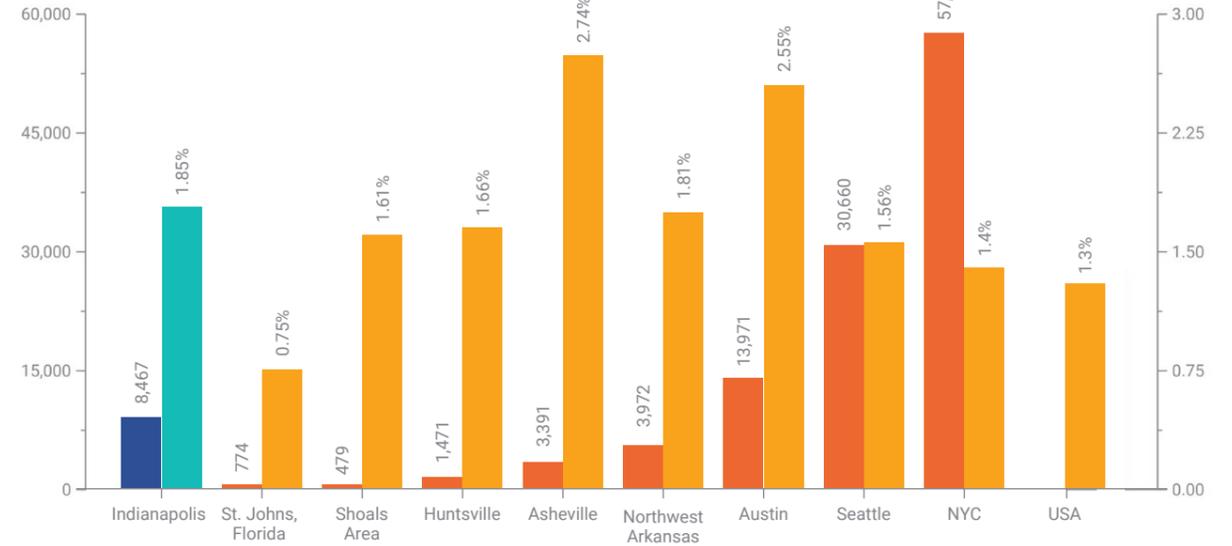
Source: County Business Patterns, Sound Diplomacy Research

MUSIC ECOSYSTEM OUTPUT PER CAPITA (IN US DOLLARS)



The music sector generates and supports 1.86% of the city's employment, a figure above the national average employment contribution (1.3%).

MUSIC ECOSYSTEM EMPLOYMENT, US CITIES



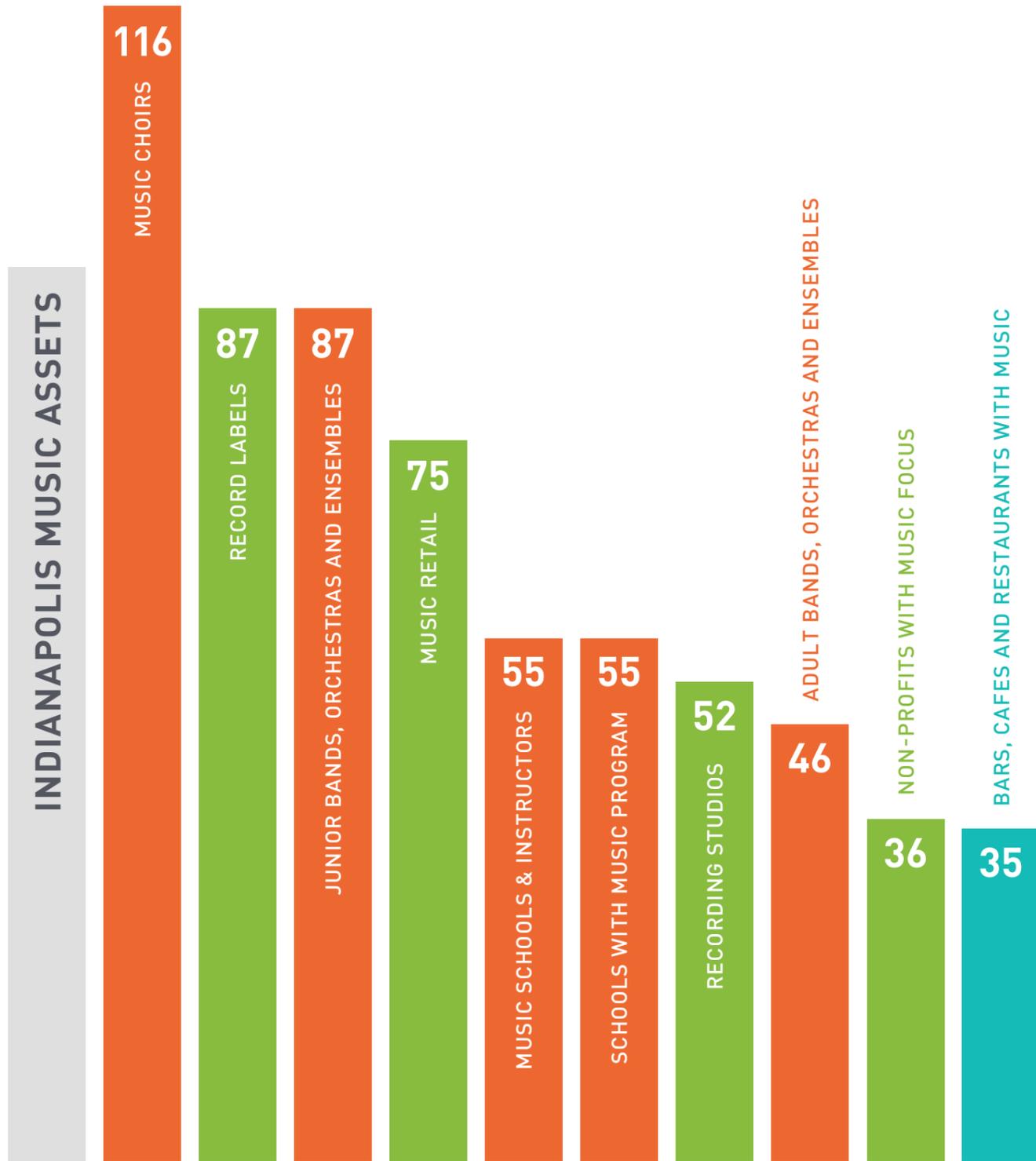
Source: Bureau of Economic Analysis & U.S. Census, Sound Diplomacy research

● Number of jobs ● Contribution to employment

Direct employment in the Indianapolis music ecosystem grew 5.4% between 2004 and the end of 2018, which represents almost twice the growth of the employment of the rest of the economy over the same period.

MAPPING¹

OVERVIEW OF MUSIC ASSETS IN INDIANAPOLIS²



All the mapped assets are visible, embeddable and shareable using Google Maps:

- [Live Music Assets](#)
- [Music Industry Assets](#)
- [Music Education Assets](#)



¹ This research was last amended on January 28, 2020, before the Covid-19 pandemic unfolded.

² Source: mapping tool, Sound Diplomacy research



INDIANAPOLIS' MUSIC ECOSYSTEM REGULATION FINDINGS

STRENGTHS

- **Indianapolis has a brand name currently well-known in the sports sector, and this could set a foundation to build partnerships and create a music city identity.** It has so far excelled at “big picture” achievements like developing and attracting large sports events such as the Indy 500, the Super Bowl 2012, and the All-Stars Weekend 2021 and has set its mark to mirror this success in the music sector.
- **The city is currently in the process of developing a software-based Special Events Portal** to help navigate event organizers through the sometimes complicated event permitting processes and costs to hold events in public territories of the city.
- **The Downtown Cultural Districts and the Indy Cultural Trail have great potential to showcase the city’s music and music heritage in its storytelling.** The trail integrates music places in some of the neighborhoods, such as the Old National Centre and the Madame Walker Theatre Center, but it does not offer a specific route or highlights for music tourists. Visit Indiana also highlights the Indiana Historical Society as part of its Indiana Music Heritage itinerary.
- **Although there is no music tourism strategy in place, the city is leveraging music as a tourism asset:** Visit Indy features music places and activities and its initiative MusicCrossroads brings in music-related tourism through competitions.
- **Busking opportunities are available on public property without any permit required** if there is no donation requested vocally (signs are allowed). This progressive approach has been positively reinforced with past public programs such as the Downtown Indy Buskers pilot in 2014 and IndyFringe yearly since 2014.
- **Indianapolis has a strong music education sector and organizations.** Plenty of music education opportunities are available, including school courses, after-school programs, academies, and colleges. Although only a handful, there are tertiary education opportunities available in music technology, sound production, and music business.
- **There is an increased offering of grants for the music sector and other creative industries on a local level,** such as the Arts Council of Indianapolis (supported through the city budget) art grants and Create Indy’s grants, although it is noted these are not available exclusively for musicians or music organizations.



Photo: Visit Indy

REGULATORY CHALLENGES	BEST PRACTICE FOR INDIANAPOLIS
Lack of a music office leadership structure bridging the public and private sector and aligning development goals.	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 businesses while attracting new businesses.
The Dancehall Ordinance hurdles audience development in music and creates additional expenses for music venues. Most venues host exclusively +21 shows.	Milwaukee amended in 2019 its restrictive city codes to make it possible for venues to host all-ages shows and simultaneously serve alcohol to patrons 21 and over.
Limited connectivity of music places and residential areas at night outside of the Red Line bus service.	Philadelphia has 24-hour bus lines.
Lack of designated artist parking near music venues.	Austin, Seattle and Nashville all have artist loading and unloading zones.
No Agent of Change principle or similar policy to protect new and existing music venues from property development changes.	London, San Francisco and the Australian state of Victoria have forms of the Agent of Change principle.
There is a limited number of licenses for each county and multiple types of permits available for licensed establishments (\$750–1,000/year). Food must be available at all times and minors are not allowed at bars.	Lafayette, LA offers only a handful of liquor license categories (state and local) to choose from, starting at \$180 for beer only to \$895 for beer and liquor. Its consolidated government website has a specific section to apply for alcohol and noise control permits, clearly explaining the requirements.
Noise laws are imprecise with no dB limit or measurement procedure in place, stating “Unreasonable noise” is forbidden between 10pm and 7am.	The noise ordinance in Austin establishes clear dB limits and curfews in the designated Entertainment Districts. They have pioneered a curfew extension for music venues in their Red River Entertainment District.
Although there are six Cultural Districts branded, there isn’t an Entertainment District defined as a zoning overlay that has policy implications.	Austin has 6 entertainment districts, each with unique laws regarding extended curfews for live music outdoors.
No local music tourism strategy for the general public.	North Carolina’s Come Hear NC program or Mississippi’s Birthplace of Music Program are comprehensive best practices.
Lack of union for musicians outside of the classical sector and jazz.	Musicians Union UK’s Fair Play scheme could be applied to all Indianapolis venues.

INDIANAPOLIS MUSIC STRATEGY VISION

This vision is our aspiration for Indianapolis if we consolidate all the recommendations in this strategy:



ARTIST, MUSIC PROFESSIONAL AND COMPANY OPINION



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

AUDIENCE OPINION

Average ratings for the Indy music ecosystem, Music Fans only

CATEGORY	RATING
Safety in venues/festivals	4.5
Safety around venues/festivals	4.5
Sound quality of music venues/festivals	4.0
Ticket prices	3.5
Diversity of music offerings and genres	3.5
Quality of local talent	3.5
Late evening/night dining options	3.0
Public transportation to music venues/festivals within Indianapolis	2.5
Parking around venues/festivals	2.5
Availability of music education	3.0
Quality of music education	3.5
Indy's music heritage	2.5
Public transportation to music venues/festivals within greater Indianapolis	2.5
Reputation of Indy as a music place	3.0

SAFETY IN VENUES/FESTIVALS

TOP TWO ASSETS

SAFETY AROUND VENUES/FESTIVALS

PUBLIC TRANSPORTATION TO MUSIC VENUES/FESTIVALS WITHIN GREATER INDIANAPOLIS

TOP TWO CHALLENGES

REPUTATION OF INDY AS A MUSIC PLACE

KEY FINDINGS



Photo: Arts Council of Indianapolis

KEY FINDINGS

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

STRENGTHS

- **Diverse population** makeup with a large percentage of **young workers**
- **Excellent variety of music education opportunities** that need to be further supported and promoted
- **Diverse ecosystem** of music genres, talent, and venues (although limited audience engagement)
- **Wide live music offer** at any day of the week, from major touring acts to small intimate venues
- **Rich music heritage** of performers, venues, businesses, and recorded music untapped in the city's present narrative
- Presence of **national music organizations** and music competitions
- **Music is embedded in local regeneration plans** (e.g. Indiana Avenue, White River)
- **Positive experiences with busking regulations** and city-led busking programs in the past
- **Supportive communities** of artists, professionals and music spaces, particularly within the same music genre
- **Cultural Districts** concentrate the offer of music and cultural activities, a key marketing asset for tourists and locals.

CHALLENGES

- **Absence of a music office** or equivalent to bridge private and public sector and align goals and priorities
- **Lack of diversity in local industry leadership**
- **Gaps in the accessibility and equity** in the music ecosystem for artists, professionals and audiences of color, female and non-binary and/or LGBTQ+, and for differently-abled persons.
- **Absence of equity frameworks** in music-related funding and policy development
- **Regulation limits participation** in venues for artists and audiences **under 21**
- **Unclear policies** leave the music sector defenseless in regards to **noise compliance**
- **Limited opportunities** for full-time industry employment and artist support roles
- **Gaps in live music offer** in communities far from entertainment districts
- **Few options for music business education and mentoring opportunities** in the city
- **Lack of a music tourism strategy** leveraging the city's heritage and its vibrant music scene as assets
- **Lack of sensible policing** regarding security and safety issues at music spaces/events.

RECOMMENDATIONS AND NEXT STEPS



Photo: Visit Indy

RECOMMENDATIONS AND NEXT STEPS

Recommendations are arranged across 6 action areas and outline the strategic opportunity findings from all the previous research stages.

1. GOVERNANCE AND LEADERSHIP
2. MUSIC EDUCATION
3. ARTIST & INDUSTRY DEVELOPMENT
4. SPACES AND PLACES
5. AUDIENCE DEVELOPMENT
6. MUSIC TOURISM

Each recommendation has been phased according to priority, indicating when they would be best suited for implementation: **Phase 1 (2020-2021)**, **Phase 2 (2021-2022)**, **Phase 3 (2022-2023)**. These recommendations have been expanded upon in the extended Indy Music Strategy, which details how to implement each recommendation, perceived benefit and timeframe of delivery.

PHASE 1 (2020-2021)	PHASE 2 (2021-2022)	PHASE 3 (2022-2023)
RECOMMENDATION #1 Establish the Indy Music Strategy Committee		
RECOMMENDATION #2 Develop a localized talent pipeline for Black and Brown artists and industry leaders		
	RECOMMENDATION #3 Enhance funding opportunities for the entire music sector	
RECOMMENDATION #4 Amend regulatory frameworks to create an equitable music ecosystem		
RECOMMENDATION #5 Increase all-ages access and create a more inclusive music ecosystem		
		RECOMMENDATION #6 Assess the implementation of an overlay zoning for music, arts and culture
	RECOMMENDATION #7 Devise music-centred incentivization programs	

PHASE 1 (2020-2021)	PHASE 2 (2021-2022)	PHASE 3 (2022-2023)
	RECOMMENDATION #8 Create music education opportunities and improved access through stakeholder collaboration	
	RECOMMENDATION #9 Establish "music career days"	
	RECOMMENDATION #10 Expand artist development services and industry training	
	RECOMMENDATION #11 Activate a "Fair Pay" compensation scheme for artists	
		RECOMMENDATION #12 Implement a program designed to utilize non-traditional music spaces
	RECOMMENDATION #13 Designate a single entity responsible for consolidating all music industry promotions, showcases, and resources online	
	RECOMMENDATION #14 Support the broadcast of contemporary local music on public radio	
	RECOMMENDATION #15 Memorialize Indianapolis' historically significant sites and musicians in jazz, blues and other genres	
		RECOMMENDATION #16 Develop a documentary exploring the relationship of local musicians and organizations with the city
	RECOMMENDATION #17 Introduce a paid busking scheme in tourist hotspot areas	
	RECOMMENDATION #18 Support the promotion of multi-day signature events and venues showcasing local talent	
	RECOMMENDATION #19 Partner with Visit Indiana and Visit USA to increase the media coverage of Indianapolis as a music city	

ACKNOWLEDGEMENTS

Sound Diplomacy would like to thank every individual who participated in the research, shared information, responded to the survey and spread the word about the study. Your participation and input have been invaluable and this work could not have been done without you. Thank you.

ABOUT SOUND DIPLOMACY

Sound Diplomacy is the leading global consultancy advising cities, governments, tourism boards and large organizations on music and night time economy policy. Their work has helped define the 'music cities movement' and been delivered in over 20 countries and 50 cities around the world.

www.sounddiplomacy.com

ABOUT INDY MUSIC STRATEGY

Inspired by the first-ever U.S. Music Cities Forum in Indianapolis in 2018, the Indy Music Strategy was established in February 2019 as an economic development initiative focused on building Indianapolis' diverse and growing music industry. The Indy Music Strategy, convened by the Indy Chamber, is led by a local steering committee with support from Sound Diplomacy. The Steering committee is made up of representatives from the following groups: Indy Chamber, Visit Indy, Central Indiana Community Foundation, City of Indianapolis, MusicCrossroads, MOKB Presents, Live Nation, Indianapolis Symphony Orchestra, Big Car, Musical Family Tree, MIBOR, Create Fountain Square, Chreece Presents, Bohlson Group, Eskenazi Health, Kheprw Institute, United Way, and the Arts Council of Indianapolis.

www.indymusicstrategy.com

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