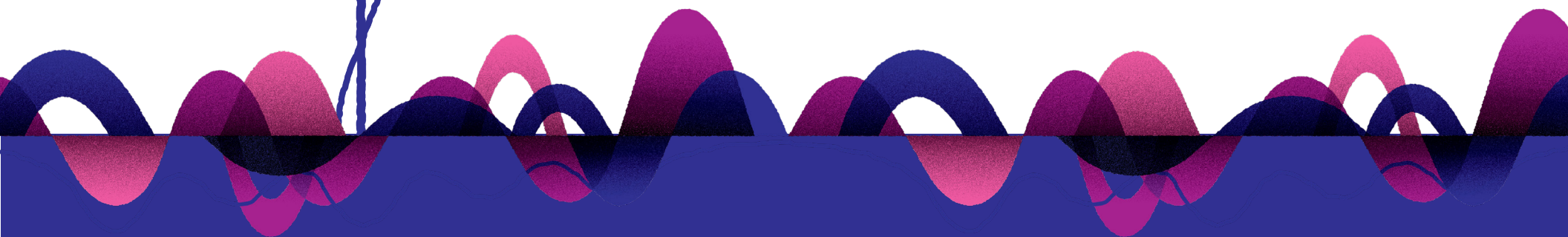


Victoria Music Strategy

2022-2026





VICTORIA SKA FESTIVAL

THE MIGHTY MIGHTY BOSSTONES

STEAKHEAD STANDERS

Mayor's Welcome Message



Victoria is a mid-sized city that offers a big-city arts and culture scene. From counterculture to iconic music festivals, growing attention to Indigenous artists and impromptu streetside performances – we've got what it takes to be a world-class music destination.

From the start of the COVID-19 pandemic in early 2020, individuals, neighbourhoods and businesses in Victoria pulled together to face these challenging times head on. Artists and the arts organizations that support them pivoted creatively to bring us online content so people had access to arts and culture for their mental health and wellbeing and for their sheer pleasure during some really difficult times.

This Music Strategy taps into our diverse musical community's incredible energy and passion, and it guides our approach to making Victoria a global musical hub. This plan is the culmination of months of working together to create a platform for innovation and creativity and to leverage the unique dynamics of our compact, island city.

By investing in culture, the City of Victoria fosters a thriving ecosystem where artistic invention and excellence will flourish, where all citizens and visitors can participate in cultural life, and where Indigenous culture and presence is recognized and celebrated. Fueling a creative economy also attracts investment, workers and tourists, and creates jobs and business growth. People want to live, work, and visit where cool stuff happens – this is what makes Victoria a bold, thriving, inclusive, and happy city.

The Music Strategy recognizes that arts and culture will play a leading role in the health and wellbeing of post-pandemic Victoria, feeding our spirits as well as our economic recovery. Music will always be a powerful tool to help us better understand ourselves, each other and our surroundings.

Lisa Helps, Victoria Mayor

By investing in culture, the City of Victoria fosters a thriving ecosystem where artistic invention and excellence will flourish, where all citizens and visitors can participate in cultural life, and where Indigenous culture and presence is recognized and celebrated.

Chair of the Music Advisory Committee Message

It is no secret to those of us involved in the music community in Victoria, either professionally or as an audience member, that there is an immense amount of musical talent in Victoria. I am grateful that the City of Victoria recognizes this talent and the positive impact that music brings to our community, and has taken the initiative to create this music strategy.

This hasn't been an easy time for those of us involved in music. Across the industry, we have deeply felt the loss of the last year and a half (and counting?) of cancelled performances due to the ongoing pandemic. So many people have been working tirelessly to try and find a way to make it all still work safely, despite it all.

It has been an honour to work on the music strategy and talk with so many passionate and dedicated people within the music community about how the City of Victoria can continue to support our vibrant and resilient music scene, especially during these uncertain times. I genuinely hope that the music strategy will be a helpful guide for the City of Victoria over the coming years.

As chair of the Music Advisory Committee, I'd also like to thank my fellow Music Advisory Committee members for their time, dedication and valuable insights. There are lots of exciting opportunities to explore in the music strategy and I look forward to seeing them come to life!



Photo credit Steve Calder

Kathryn Calder

Chair of the Victoria Music Advisory Committee
2019-2021 Victoria Artist in Residence

Table of Contents

Welcome Messages	3	Economic Impact Assessment	18
Acknowledgement	6	Survey Highlights	21
Vision.....	7	SWOT Analysis	23
Executive Summary	8	Issues and Challenges.....	26
Introduction.....	11	Strategic Priority Areas.....	27
Planning Context.....	12	Action Items.....	28
Background	12	RESOURCES AND REFERENCES	33
Methodology	13	ADDITIONAL NOTES	34
Key Findings	16	SHOUT OUT	35
Cultural Mapping Highlights	16		





ACKNOWLEDGEMENT

The Victoria Music Strategy was produced on the homelands of the Songhees and Esquimalt People. We are grateful to the ləkʷəŋən People for stewarding these territories for thousands of years and for generously welcoming those of us who are visitors.

VISION

The Victoria Music Strategy advances the vision from the Create Victoria Arts & Culture Master Plan, specifically that “Victoria radiates creativity and thrives as a home to creative people and everyday artistic encounters.”

The music strategy will guide us towards a thriving, inclusive, and prosperous place; to make Victoria a dynamic music hub and a global music destination.



Executive Summary

Victoria has cultivated its own unique identity through a music legacy that rivals most major Canadian markets. From Nelly Furtado and Aidan Knight to Hot Hot Heat and Nomeansno, Victoria is home to pop virtuosos, vagabonds, troubadours, and punk icons. As Canada's seaside hotbed of twee pop and indie rock, it has nurtured countless iconic independent music upstarts, including Kathryn Calder, Current Swell, Frog Eyes, Immaculate Machine, and Carolyn Mark...to name a few.

Victoria is an undiscovered gem with a long tradition of supporting countercultural ideas. Victoria hosts iconic music festivals like the Victoria Symphony Splash, JazzFest, Rifflandia and Ska and Reggae Festival for more than a decade while encouraging young musical upstarts such as the Pretty Good Not Bad festival. The city is also celebrating some of the most exciting new Indigenous acts by showcasing their work at Indigifest and the Victoria Indigenous Cultural Festival.

The city is also home to historical music societies like the Ancient Music Society of Victoria and Early Music Society of the Islands, a distinction that sets it apart from many of Canada's larger music markets. With longstanding institutions like the Victoria Conservatory of Music, Pacific Opera Victoria, Victoria Symphony and Hermann's Jazz Club, Victoria has developed an impressive ecosystem of jazz, classical, and early music communities that punches well above its weight on the international touring circuit.

Over the years, this mix of music backgrounds has showcased Victoria's creative community as a leader in highlighting the benefits of an inclusive and diverse music scene. It also has a big role to play in attracting investment and tourists, as well as creating jobs and business growth. Simply put, people want to live and work where cool "stuff" happens and Victoria has this in spades.

The potential is exciting. A city that leverages music as a tool for sustainable urban development, champions music education across age and ability, and recognizes the power of a well-supported music ecosystem to be a compelling driver of talent attraction and retention.

The COVID-19 pandemic has had a significant impact on the music sector for the past year and a half. The pandemic has amplified the major issues and challenges that were identified in the early analysis phase of the strategy development, but the challenges remain largely the same. Musicians need spaces and resources to rehearse, produce and perform. This ecosystem is fragile and under threat. Affordable housing, cultural spaces and regulatory barriers are issues that need to be addressed if we are going to sustain the music sector. Artists will no longer find a place for themselves in a city that does not make space for creativity and nurture the conditions for artists to thrive.



Victoria has all the ingredients to be a world class music destination. The combination of natural beauty, mild climate, long history of Indigenous culture, DIY, indie-folk island culture, and our positioning between two major music hubs, Vancouver and Seattle,

provide the foundation to nurture what is already distinct and unique about this place.

The Music Strategy provided an opportunity for the music sector to dream big, share ideas, talk through issues, and find solutions.

This Strategy is the result of many months of reading and learning from past reports, mapping our music assets, finding the gaps and strengths and engaging thousands of artists, avid music fans, and business and tourism leaders.

The Music Strategy highlights five major priority areas that require support and attention for the City of Victoria to take action on:

1. Remove regulatory barriers and create music friendly policies.
2. Preserve existing spaces and encourage the development of new spaces.
3. Build local capacity for artists to develop their music careers.
4. Grow audiences and expand access to music in all its forms.
5. Seek partnerships and collaborations to explore new innovative music platforms and experiences.

The Victoria Music Strategy focuses on these key priority areas to ensure the music community continues to be a dynamic, inclusive, and diverse industry.



Ska Fest

Introduction

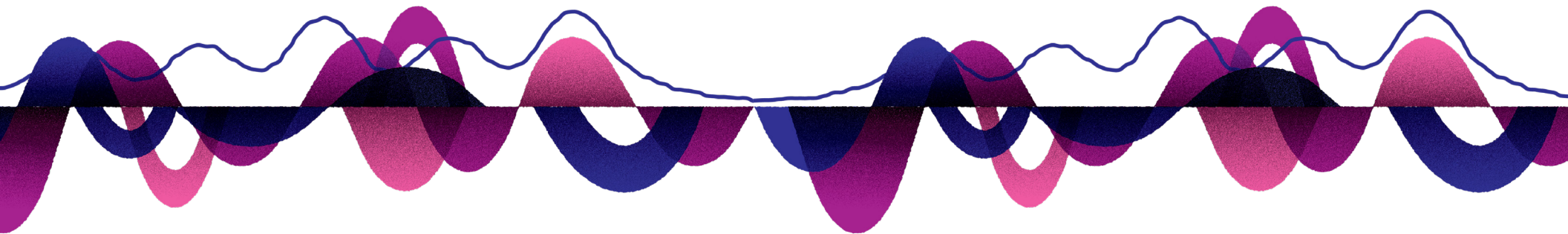
Every city around the world is a music city. From street performances to major rock concerts, people are living in a music city regardless of where they are. What makes a city become known as a music place is the way in which music is prioritized, organized, and activated. Activating the power of a music ecosystem requires a strategy, much like a city that has a plan for reducing waste by incentivizing and mandating recycling and compost services. To do so, a music city also requires infrastructure to operate. Where it matters most, however, is how music is curated and integrated into the already existing functions of a city. How is it being treated, cared for and protected? When you begin to ask these questions, you begin to recognize the many facets that encompass a music ecosystem.

For Victoria, music is already ingrained into our civic heritage and identity. The narrative of Victoria's musical history is one of diversity and talent of the highest quality. This narrative reinforces the uniqueness of this place.

Prior to the global industry freeze brought on by the COVID-19 pandemic, the City continued to create opportunities for artists. The global music industry was growing rapidly and despite the hardships affecting the live industry, music continued to be consumed at a remarkable rate as artists and music professionals adapt to the parameters of safe entertainment. As such, this study worked to develop progressive opportunities ensuring that Victoria's music ecosystem has a clear pathway to recovery while actively preparing for the future. From music therapy and technology courses to collaboration with

regional cities, Victoria is on course to become a leader in music city practices. However, the longevity of the industry is dependent upon recovery, adaptability, and a desire to learn.

Victoria's music community should be celebrated, not only for what has already been accomplished, but for the dedication to building an even stronger future. Each area of the music sector is much more likely to grow when being developed in conjunction with one another and with the intent of serving the greater good of the community. These actions will be tedious, and they will require extreme care, but they will be worth it.



Planning Context

In 2017, Council adopted the Create Victoria Arts & Culture Master Plan. Create Victoria aligns ideas, people, and resources around a shared vision and a set of goals, strategies, and actions to realize Victoria’s creative potential and guide investment. Feedback was collected through cultural cafes, workshops and community engagement events and gathered feedback from over 2,000 people. The Master Plan identified the need to build on Victoria’s diverse and active music scene by positioning Victoria as a Music City.

This strategy nests underneath the Create Victoria Master Plan as a specific industry focused document to guide the City’s work in this area. As such, the Create Victoria Vision Statement, Cultural Policy, Values and Guiding Principles continue to guide our work on the Music Strategy.

Other essential City planning documents that guided the development of the Music Strategy include the Official Community Plan, Parks and Open Space Master Plan, Downtown Core Area Plan, and Local Area Planning documents.

Background

The purpose of the Victoria Music Strategy was to take a closer look into the music sector and respond to the call to provide greater support to musicians and music organizations.

In early 2019, Council approved the appointment of the Music Advisory Committee to oversee the development and implementation of the Victoria Music Strategy. The Advisory Committee has also served as community ambassadors to actively promote public involvement in the planning process and act as a sounding board to assist staff during the engagement phase of the project.

In late 2019, the City partnered with Music BC to contract Sound Diplomacy, a globally recognized organization specializing in music ecosystem analysis, to identify gaps, analyze the data, engage the local music sector and present recommendations for implementation.

Since 2019, the City, Music Advisory Committee and Sound Diplomacy have researched, analyzed and engaged the community on what is needed to better support the music sector. Sound Diplomacy completed the Victoria Music Ecosystem Study in early 2021 which informed the action items in the City of Victoria’s Music Strategy.

Many cities across Canada have responded to the groundbreaking report, The Mastering of a Music City, published by Music Canada in 2015, aiming to reveal the economic impact of our regional music sectors. A year later, BC Music Sector: From Adversity to Opportunity (2016), responded to the unique challenges facing the BC music sector, making targeted recommendations to preserve and expand the economic capacity of music in the province of BC. To support industry growth, the BC Government responded with a \$15 million investment in the BC Music Fund (2016), now re-branded as Amplify BC. Renewing an additional \$7.5 million annually to the project.

“Victoria is exceptionally rich in local talent. So many have launched from here to faraway places, and some have also returned or stayed and greatly enrich our lives.”

- Survey Respondent

Methodology

In 2019, City staff worked alongside the Music Advisory Committee and consultants at Sound Diplomacy to complete an in-depth assessment of Victoria's music ecosystem, which encompassed benchmarking, economic analysis, literature reviews, regulatory reviews and a comprehensive in-field visit

In summary, the music ecosystem analysis includes:

- Governance and regulatory functions that are related to music (funding, transportation, education, permitting, licensing) at both a provincial and municipal level.
- The music industry (recorded, live, production, creation, marketing).
- Hospitality and tourism industries.
- Music export programs.
- Creative industry actors.
- Night-time economy activities.



The process for this study was as follows:

STEP 1

Music Visioning and Regulatory Assessment

Working with Sound Diplomacy, this step included research, literature reviews and a regulatory assessment as well as a visioning session with the Music Advisory Committee. We also compared the findings to best practices from all over the world.

STEP 2

Stakeholder Engagement

1,498 respondents participated in an online survey between March and April 2020. 396 were musicians, 968 music fans and 134 music industry professionals. We also conducted 16 roundtables and 20 online and in-person interviews, with over 100 music industry and policy representatives engaged.

The roundtables also included a virtual Indigenous Roundtable discussion with a group of professionals from the music sector who also identify as members of BIPOC communities.

The roundtable sought to ensure that local BIPOC artists and those in the cultural industries could discuss their perspectives, concerns and views on the local music industry in Victoria.

STEP 3

Quantitative Research

Sound Diplomacy consultants combined cultural assets with data pulled from Arts Victoria culture map and additional sources, such as the Canada Culture Satellite Account, to deliver an economic impact assessment of Greater Victoria's music ecosystem. This phase also included identifying gaps in data sets that were critical to understanding the full scope of the local music ecosystem.

STEP 4

Analysis of Key Findings and Strategic Opportunities / Crisis Relief Measures

Sound Diplomacy reported on their analysis of strengths and challenges in eight strategic opportunity areas: governance and leadership,

diversity and equity, audience development, music education, artist and industry development, spaces and places, and music tourism. As well, given the global pandemic, they have prepared and included an additional component under each strategic area titled Crisis Relief Measures.

STEP 5

Final Music Strategy Preparation and Engagement

City Staff developed the Victoria Music Strategy based on the final Victoria Music Ecosystem Report provided by Sound Diplomacy, and re-engaged the sector with our Strategic Priority areas and 27 Action Items before bringing the final reports to Committee of the Whole. 430 people participated in an online survey highlighting these areas, and more than 30 people attended an in person Open House style Info Session.



ANSWER Women's Drum Group

Key Findings

The following findings were taken from different aspects of the research, mapping and engagement phase and are highlighted below. For complete reports please go to the Resource and Reference section of the Strategy.

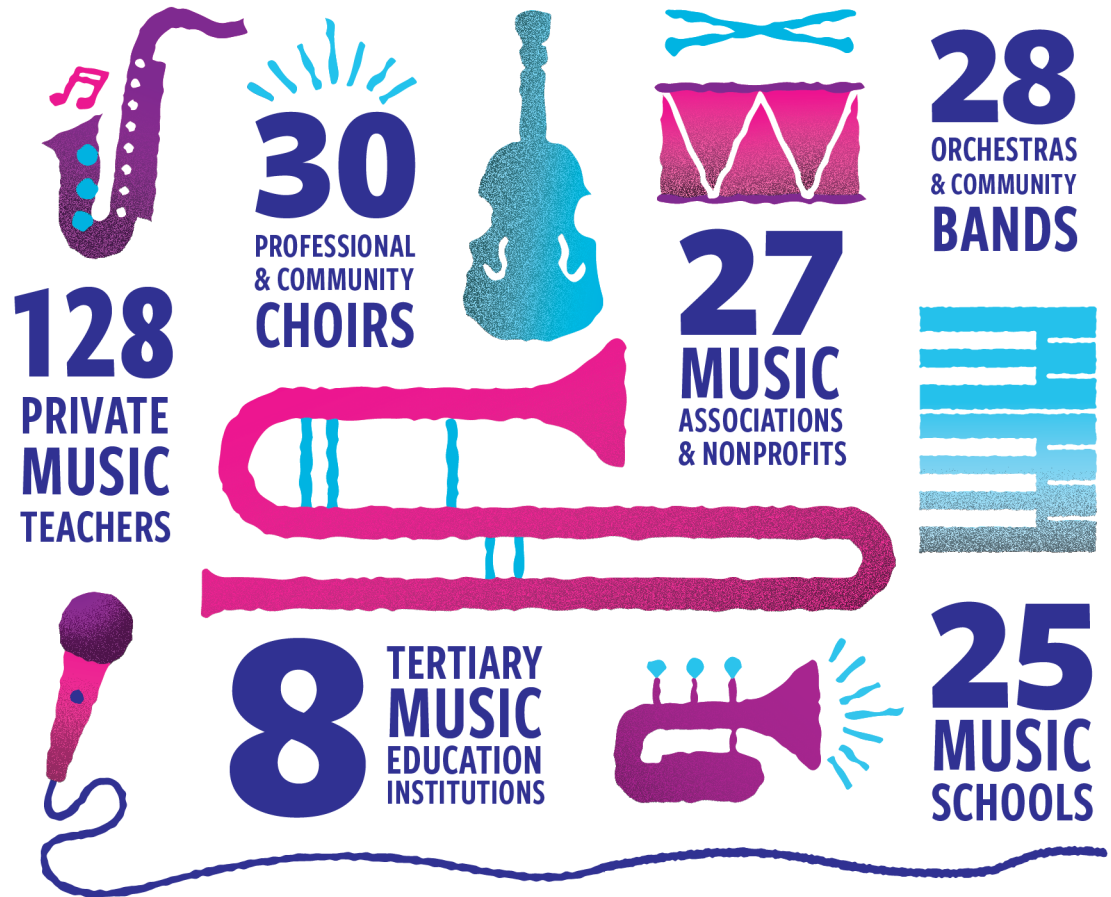
Cultural Mapping Highlights

The music ecosystem map was compiled as follows:

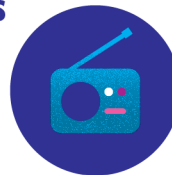
Sound Diplomacy utilized proprietary mapping software publicly available API data from Google, Songkick, and other sources to scan the overarching music ecosystem across Greater Victoria.

Cross-referenced through the industry survey, roundtables, one-on-one interviews and the existing Arts Victoria Culture Map, to further identify spaces, places and companies across Greater Victoria. In addition, the results were verified manually to ensure that mapped assets are still in use today.

MUSIC EDUCATION AND ORGANIZATIONS



RADIO 10 Radio stations based in Greater Victoria, one of them in the City of Victoria



FESTIVALS 17 Festivals with primarily music programming and focus on music as part of their mandate, 11 of them taking place within the City of Victoria

VENUES



35 VENUES OCCASIONALLY HOSTING LIVE MUSIC

(incl. parks, open air grounds and community centres), 15 of which are within the City of Victoria



26 BARS, CAFÉS AND RESTAURANTS WITH LIVE MUSIC PERFORMANCES

(ticketed and free), of which 13 are located within the City of Victoria



8 PURPOSE-BUILT MUSIC VENUES

5 of which are in the City of Victoria



29 MULTI-PURPOSE VENUES

(incl. performing arts theatres, concert halls and venues for hire), 9 of which are in the City of Victoria



17 NIGHTCLUBS WITH REGULAR MUSIC PROGRAMMING

10 of which are in the City of Victoria



2 MULTI-USE ARENAS

one of which is in the City of Victoria

MUSIC INDUSTRY



Music Retail & Rental businesses

(including record stores and backline rentals), 8 of which are in the City of Victoria

Rehearsal Spaces

(including studios available for rehearsal), 3 within the City of Victoria

Recording Studios

3 of which are in City of Victoria

Concert & Event producers

5 of which are in City of Victoria

Record Labels

3 of which are based within the City of Victoria

Instrument Manufacturers

Music Managers

Booking Agents

Music Promoters

Music Hubs & Co-working spaces

Music PR & Marketing businesses

Music Production & Post-production businesses

Other music businesses

(e.g. design, publishing, media, etc.)

Economic Impact Assessment

An Economic Impact Assessment was included as part of the scope of work for the Music Strategy.



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

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

Music ecosystem domains included in the economic impact analysis:

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

The geographic scope of this assessment is limited to the Greater Victoria metropolitan area within the province of British Columbia. Additionally, to enrich the comparative analysis, the rest of the province was considered within the assessment as a regional unit.

In 2017 the three domains of the music ecosystem, as defined above, created 3,630 direct jobs in Victoria. They were responsible for a direct Gross Domestic Product (GDP) of \$223.61 million and a direct output of \$463.21 million.

**LIVE MUSIC
PRODUCE**
**2,620
JOBS**
**AND A
\$312
MILLION OUTPUT**



**SOUND
RECORDING
PRODUCE**
281 JOBS
**AND A
\$26 MILLION
OUTPUT**

**SUPPORTING AND
BROADCASTING
PRODUCE**
729 JOBS
**AND A
\$125
MILLION
OUTPUT**

Post-pandemic figures have yet to be calculated. Looking at the regional landscape, Victoria produced 22% of British Columbia's music ecosystem GDP, while Vancouver and the rest of the province accounted for 51% and 27%, respectively. (See Additional Notes on page 34 for further context)



Jesse Roper - Photo credit Tyson Elder



TOP: Kirsten Ludwig - Photo credit Tyson Elder; BOTTOM: Mike Oswald - Photo credit Spencer Pickles

Please note that these figures and feedback points were obtained prior to the impact of COVID-19 on the live music sector and are indicative of a fully operational music industry. They should be utilized to benchmark goals and outcomes beyond crisis recovery action items.

- 1.8% of Victoria's total workforce works in music.
- 68% of local musicians rely on live music income.
- 30% of musicians earn their living almost exclusively from music.
- There are 17 music festivals and concert series in Victoria.
- Before COVID-19, there were over 110 venues showcasing music across the Capital Regional District.
- The British Columbia music economy grew 19.8% between 2010-2017, credited to a 14% growth in live music and 28% growth in sound recording.
- 75% of artists do not have professional support teams (e.g., manager, label, booking etc.).
- 68% of local artists rely on live music income, 33% have recorded music sales and 22% have income from royalties.
- 38% of the surveyed professionals say that less than 25% of their income is derived from music activities, whereas 46% of those surveyed have an additional source of income performing professional activities in a non-music field.
- 45% of live music places in the region are in Victoria, while 55% are distributed throughout the greater regional area.
- 65% of festivals with music programming are in Victoria.

Survey Highlights

An online survey ran from March through April 2020. There were 530 industry respondents (396 musicians and 134 organizations and music business professionals) and 968 music fan respondents. The survey covered topics such as music ecosystem strengths and challenges, artist and industry development gaps and music audience habits.

Organizations and Workers in Victoria's Music Industry

Victoria has a semi-professional music industry

Music industry workers/organizations in Victoria are not fully professionalized, with over one third (38%) of the people surveyed stating that less than 25% of their income is derived from music activities. Workers and organizations still have a high dependency on other economic activities besides music where the most common additional source of income is performing professional activities in a non-music field (46% of people selected this option).

Live music is at its core

These workers and organizations, when working for the music ecosystem, mainly are related to live music activities: perform activities within a festival (33%), a live music venue (34%) and live music industry activities such as being talent buyers or promoters (33%).

Local music is the focus

Local artists make up the main entertainment offering by local music venues and the main compensation means is through a fixed fee per show.

Singers and musicians are main creative generators

Artists in Victoria are mainly classified as singer and/or musician songwriter (41%) and singer and/or musician, performer (39%).



Mad Riddim - photo credit Colin Smith

Music Fans and Audiences

An existing audience advocates for local talent

Victoria's music audience is an active follower of local music. They express this by actively following local artists in social media (49%), paying entrances to local artists shows (49%), streaming their music or videos (48%) and listening to them on the radio (48%).

There is opportunity to increase attendance frequency

Even though audiences attend to local artists' performances, they don't do it in a high frequency (mainly once every couple of months), hence there is an opportunity to lure them to increase their attendance. Ensuring that artists are more engaged with the local community might be an alternative to make local music more visible to this audience (besides using traditional promotion channels).

The music demand matches the supply

Victoria's music offering is very diverse, where rock/punk/metal is one of the most popular, as well as funk, soul and R&B, classical and folk and singer-songwriter. These genres are the preferred ones by the audience, which matches the current programming/offering from artists and music venues.

Policy and regulations generate the most negative impact

Noise ordinance, liquor licenses and all-ages accessibility are the main three policies or regulations that have generated the most negative impact for artists and music industry workers/organizations.

Need for funding or grants

Stakeholders communicated most artists and music industry workers/organizations have never received a grant or tax rebate. They mainly haven't done so because they don't know what is available for them. This is an opportunity for governments to educate or better communicate to these segments on their options.

The music ecosystem advocates for diversity

In our findings, both artists and music industry workers expressed being advocates for ensuring diversity in genres and backgrounds. They also expressed they expect the government and leadership groups to incorporate this value in the actions they take towards the music ecosystem.



Caleb Hart - Photo credit Tyson Elder



Caleb Hart - Photo credit Tyson Elder

SWOT Analysis

STRENGTHS

- Victoria City Council and Mayor are seen as forward-thinking, with a desire to support music and culture.
- Victoria has innovative music education – the University of Victoria’s computer music program is unique and has seen graduates go into music tech jobs with Bandcamp, SoundCloud and Silicon Valley.
- There is an abundance of offerings related to funding programs for musicians and businesses, within all levels of government.
- For a city its size, there is a tremendous amount of music talent in Victoria: it is a place that attracts people with its natural beauty and quality of life.
- There are exemplary progressive music practices in relation to music therapy and music technology, whether through academic or professional practice.
- There are strong traditional music education offerings, from private instrument or vocal lessons to music ensembles in schools.
- Festivals and other outdoor live music events lure tourists and new residents to the city.

WEAKNESSES

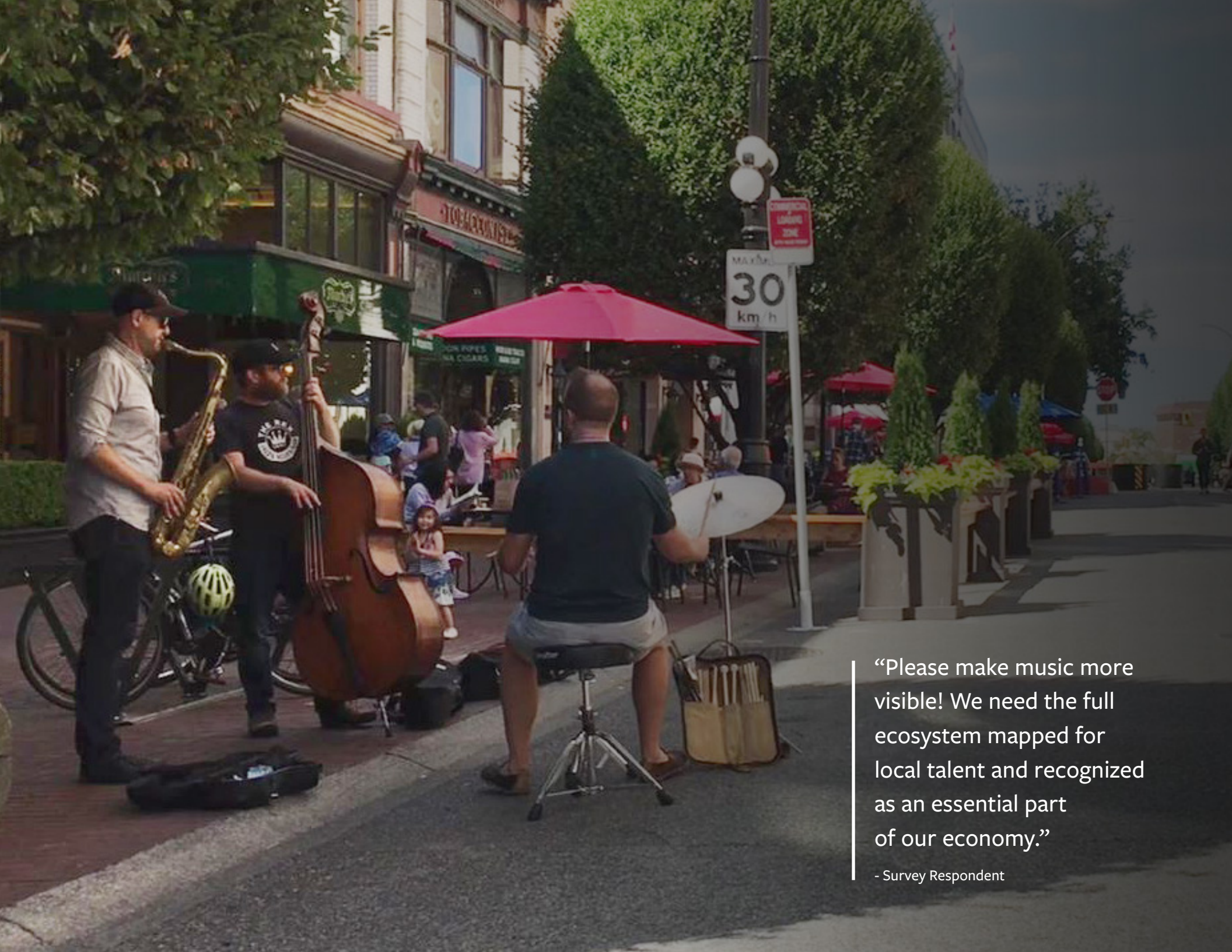
- Liquor licensing processes are inadequate and confusing.
- There are few ride-sharing services and very few late-night dining options in Victoria, and many businesses have cut hours.
- There needs to be better education on rate-setting to improve fair pay for music makers across the board, like the standards set for visual artists by CARFAC.
- There is a lack of a centralized source of information on music events in Victoria that is easy to access for both event producers/artists and consumers/fans.
- There is not enough ‘soft’ music industry infrastructure, like entertainment lawyers or certified accountants with experience in royalties and industry-specific financial management.
- Victoria’s venue ladder is lacking in mid-sized venues and accessible and welcoming spaces for underrepresented groups (all-ages, differently abled patrons, LGBTQ2S+ community, Indigenous musicians).
- Access to permits in local parks, especially Beacon Hill Park, among other music spaces, can be hard to obtain, limiting the opportunities for artists to celebrate cultural diversity or further enhance the social value of the city.
- Participation and representation of diversified groups and marginalized communities are lacking within the music ecosystem as a whole.

OPPORTUNITIES

- Dormant and underutilized spaces can be used to host music events, cultural celebrations and entertainment events.
- BC Transit's pilot program, which saw a limited number of routes running later (until 2:30 a.m.), can be expanded to support a thriving night-time economy.
- Create music and cultural spaces/hubs that promote Indigenous peoples and those who identify with diverse populations.
- Better equip Victoria's musicians to submit for grants, through workshops or classes on how to incorporate, obtain business licenses and apply.
- Engagement with groups like the First Nations Council and the Intercultural Association of Greater Victoria, integrating members into music programming and events.
- Complete Victoria's strong music education foundation by adding specified music industry education (music business, management, marketing and public relations, copyright) to prepare musicians, artists and budding industry professionals for careers in music.
- Utilize the natural attractions and rich musical heritage to promote Victoria as a music city.

THREATS

- The geographical isolation of Victoria can negatively impact music tourism and music touring between Vancouver, mainland Canada, Seattle and other US cities. The cost of ferry travel is a particularly critical concern for touring artists.
- The city's strong live music scene could suffer the serious impacts of the current COVID-19 situation, with mid- to long-lasting effects on audience behaviour.
- Without more access for young people to live music, there is no pipeline for future artists and industry professionals.
- The retention of students graduating from the University of Victoria is not strong, largely due to the expense of living in Victoria, leading students and music-students to relocate.
- The recording infrastructure that exists in Victoria is primarily home studios, which are not licensed businesses.



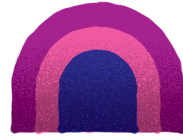
“Please make music more visible! We need the full ecosystem mapped for local talent and recognized as an essential part of our economy.”

- Survey Respondent

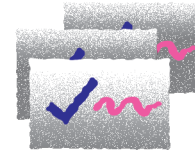
Issues and Challenges



Victoria's venue ladder is lacking in mid-sized venues with emphasis on the need for 200 capacity and 700-1000 capacity venues.



Lack of accessible and welcoming spaces for underrepresented groups (differently abled patrons, LGBTQ2S+ community, Indigenous) with an emphasis needed for all-age venues.



Access to permits in local parks, amongst other music spaces, can be hard to obtain, limiting the opportunities for artists to celebrate cultural diversity or further enhance the social value of the city.



Liquor licensing processes are inadequate and confusing.



There is a lack of a centralized source of information on music events in Victoria that is easy to access for both event producers/artists and consumers/fans.



There are few ride-sharing services and very few late-night dining options in Victoria, and many businesses have cut hours.



Participation and representation of diversified groups and equity-seeking communities are lacking within the music ecosystem.

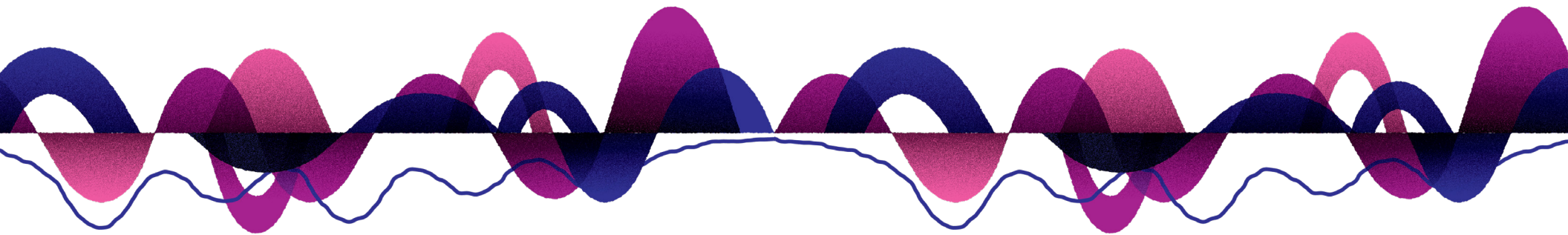


There needs to be better education on rate-setting to improve fair pay for music makers across the board, like the standards set for visual artists by CARFAC.

Strategic Priority Areas

Based on the data gathering, analysis and engagement phase, five broad priority areas emerged for the City of Victoria to implement.

- 1 Connecting People and Spaces:**
Create space for music
- 2 Nurture the Talent:**
Support musicians and music organizations
- 3 Grow the Audience:**
Everyday Musical Encounters
- 4 Be Future-Ready:**
Music Innovation and The Creative Economy
- 5 License to Create:**
Music Friendly Policy and Licensing



Action Items

1 Connecting People and Spaces: Create space for music

The City will leverage infrastructure and built environment to make music accessible to all. Work will be done to ensure that underrepresented communities, such as youth, women, LGBTQ2S+, and Indigenous peoples have increased access to spaces and resources that support the development of music and build capacity for artistic talent within these communities. Ultimately, Victoria's music ecosystem is for all its music makers, and the City recognizes that spaces and places must feel safe and supportive for everyone.

1. Support community proposals for a Performance Hub concept.
2. Prioritize the Ship Point Master Plan and Centennial Square Action Plan.
3. Maximize underutilized spaces to provide affordable and accessible rehearsal, performance and recording space.
4. Improve event amenities such as electrical and water access at key parks and outdoor open spaces.
5. Increase access for underrepresented communities at City venues including but not limited to the McPherson Playhouse, Centennial Square and the Cameron Bandshell in Beacon Hill Park.
6. Remove operational policy barriers from the Cameron Bandshell permit application process.
7. Explore policy to encourage the City to collaborate with senior government, community, and business partners to identify and recognize venues that have significant cultural and historic value. eg. Statement of Significance, where appropriate.
8. Explore policies and incentives to encourage the on-going retention and operation of cultural spaces within the Downtown Core Area.
9. Continue to advocate for affordable housing initiatives and explore live/work spaces as part of redevelopment applications, where appropriate.



The Capital Collective - Photo credit Colin Smith



Brian Yoon - Photo credit Spencer Pickles

2 Nurture the Talent: Support musicians and music organizations

We envision Victoria as a true Music City, where musicians thrive and where the music ecosystem is thoughtfully and strategically supported. This includes breaking down silos to include musicians and music organizations of all types, transcending the confines of for-profit and not-for-profit organizations by recognizing social enterprises, students, amateur groups, and beyond in this strategy. Leaving these traditional distinctions behind democratizes music in an equitable way and helps ensure music is accessible for all.

- 10.** Expand opportunities for Indigenous led music programs, all age and youth programming in publicly accessible spaces.
- 11.** Establish a Victoria Music Fund to support Victoria-based musicians, with particular emphasis on Indigenous Peoples and Equity-Seeking Communities.
- 12.** Dedicate staff resources to implement the Victoria Music Strategy and establish a one-stop shop for Music inquiries. Position existing staff as the go to for music related inquiries, navigate City processes, act as an internal ambassador for music within the City.
- 13.** Improve access to information through City communication channels including web and social media for music related inquiries including streamlining event permits and information about available public spaces for events.
- 14.** Produce an annual Music Symposium in partnership with the sector to provide professional development and capacity building workshops, networking and mentorship opportunities to build relationships in the music community.
- 15.** Explore opportunities to establish partnerships with other Music City leaders including Seattle and Vancouver Music Offices for artist exchanges, residencies and symposiums.

3 Grow the Audience: Everyday Musical Encounters

The City is intentional about expanding access to music. Victoria supports access to music education and integrated music curriculum in its schools, but also understands the power of music in a wide variety of settings from churches to community centers, universities, to front porches and public spaces.

- 16.** Increase music programming budget and the busker licensing program to expand music in publicly accessible places.
- 17.** Develop a City of Victoria Arts, Culture and Events E-Newsletter to promote opportunities, events and celebrate the arts scene.
- 18.** Work with business and tourism partners to program music in retail, transit hubs (airport, ferry terminal, bus terminal) and key attractions to showcase local talent.
- 19.** Create a summer playlist and distribute to business and tourism partners to promote local artists and bands.
- 20.** Work with other City Departments to integrate music into existing City programs and initiatives e.g. music concerts at summer camps, music at engagement and protocol events etc.



4 Creative License: Create Music Friendly Policies and Regulations

Music is all around us and woven throughout all aspects of life. Victoria works to be a leader among international cities by removing outdated policies around music - from live public performance to sound to loading zones - and thoughtfully considering a regulatory landscape that supports not just the live music ecosystem, but the creation of innovative music businesses and the smart integration of music into solving urban problems from public health and safety to education to community and social cohesion.

21. Continue to explore initiatives to maintain the Downtown Core Area as the primary centre for entertainment and hospitality within Greater Victoria, to enable a thriving live music scene. Key initiatives may include:
 - Agent of Change principal.
 - Enhanced business and liquor licensing.
 - Streamline permits and licenses for music activity to reduce barriers for live music venues to operate.
 - Explore the development of a Musician Loading Parking Permit,
 - Review current Noise Bylaw.
22. Review licensing, zoning, permitting and venue policies at City, community and commercially owned spaces to find ways to increase opportunities for all age shows.
23. Advance Late Night Economy policy directions that improve Live Music Systems and enhance vibrancy in the core. This may include but not limited to the review of liquor and business licensing, extended venue hours and other public safety measures that can support the music sector. It may also include advocating BC Transit to expand late night bus service.

WHAT IS **Agent of Change?**

Agent of Change is a measure that places the responsibility of noise attenuation and soundproofing in the hands of the newest development rather than any existing businesses



Brian Yoon and Terence Tam - Photo credit Spencer Pickles

5 Be-Future Ready: Music Innovation and the Creative Economy

This priority area focuses on inclusive growth, while also exploring the version of Victoria that is possible when smart supports are in place to fuel a competitive and innovative music industry and build a future-ready city through investment in the creative economy.

This area will harness the power of the creative economy to drive the city's future prosperity and have taken steps to support and empower music businesses small and large, making the city an ideal place to start or grow a music business. The music industry is considered in any conversation around economic development, job creation and talent attraction, and the city is proactive about building an environment friendly to music entrepreneurs.

Victoria leverages its unique value proposition for the creative economies - including its affordability in comparison to nearby metropolises like Vancouver and Seattle - to attract new talent and new businesses.

- 24.** Explore a Music Innovation Hub including accelerators, incubators, and labs as part of the Arts and Innovation District that could include production, artist development, mentorship and financing to drive growth in the music sector.
- 25.** Incorporate a Music Export Program as part of the Accelerator concept to assist musicians with skill and business development opportunities.
- 26.** Host a series of presentations to community and industry leaders to advance the Victoria Music Report to build new partnerships and collaborations.
- 27.** Facilitate networking, learning opportunities and foster creative entrepreneurship between music, business and technology sectors.

RESOURCES AND REFERENCES

Victoria Music Ecosystem Study, Sound Diplomacy (2021)

Victoria Music Strategy Economic Impact Assessment, Sound Diplomacy (2020)

Victoria Music Strategy November 18-23, 2019 Visit Report Conducted by Katerina Ivanova and Elizabeth Cawein, Sound Diplomacy (2019)

City of Victoria Vision for the Music Strategy, Sound Diplomacy (2019)

Create Victoria Arts & Culture Master Plan, City of Victoria (2017)

City of Victoria Parks & Open Spaces Masterplan, City of Victoria (2017)

BC Music Sector: From Adversity to Opportunity, Music Canada (2016)

The Mastering of a Music City, Music Canada (2015)

City of Victoria Official Community Plan, City of Victoria (2012, last updated February 27, 2020)

Downtown Core Area Plan, City of Victoria (2013)

*This report was also informed by the forthcoming Municipal Alcohol Policy report and the report Sociable City Evaluation, conducted by the Responsible Hospitality Institute in 2019.

ADDITIONAL NOTES

Comparing Municipal and Provincial Insights

The City of Victoria’s music study is an industry-led report that leverages Sound Diplomacy’s proprietary global methodology to reflect not only the direct impacts of the music and sound recording industry, but also the broader economic ripple effects they stimulate within the community.

This report is being released within the context of a newly published provincial economic assessment tool launched by Creative BC in April 2021, the Creative Industries Economic Results Assessment (CIERA). A comparison shows how Sound Diplomacy’s approach and results include extended value of the industry’s core activities. This extended value includes but is not limited to activities such as: radio broadcasting, music training, music grant investments, drinking establishments, record and equipment stores and more. In contrast, CIERA’s more focused measurement approach captures only economic impacts specifically associated with core music and sound recording activity and delivers very different economic impact results.

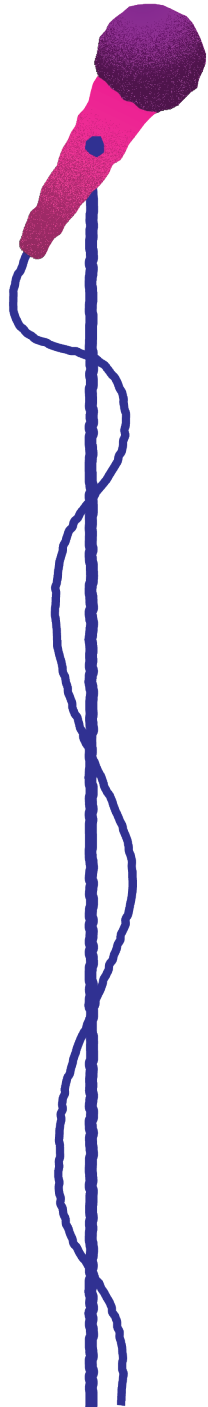
While the methodologies are completely unique, the core of the City of Victoria’s music economy and culture data reflects the same 6% of B.C.’s direct jobs in music and sound recording, and 7% of the industry’s direct economic impacts in B.C. (or direct Output). Beyond these core activities and their impacts, the Sound Diplomacy study acknowledges and quantifies the extended value of the music industry proper to include the additional economic impacts that are activated in a music city.

Whereas CIERA’s methodology is intended for focused and provincial comparability of established economic indicators such as GDP, Output and employment, Sound Diplomacy’s global music city approach is intended to reflect and consider the ways in which music and sound recording create a chain of economic cause and effect by integrating music industry activity into the city’s social fabric—expanding and enhancing community connections, shaping local identity and pride, generating new reasons for exchange, destinations for tourism and more.

About CIERA

Published in April 2021 by Creative BC, the Province’s agency of record for B.C.’s creative industries, the Creative Industries Economic Results Assessment (CIERA) integrates insights from nine distinct Statistics Canada datasets. The tool delivers consistent year over year information at the provincial level on each of B.C.’s five creative industries, as well as a sixth area of business activity that cannot be assigned to only one of the five industries but can be attributed specifically to the impacts generated by B.C.’s creative industries. CIERA’s methodology is provincially reviewed and approved for a targeted assessment of the creative industries’ core contributions to the economy. Thereby, CIERA results possess the focus and relevance necessary for comparability with other B.C. industries, sectors and their economic data published by BC Stats. CIERA data excludes all provincial and federal grants, supports and investments into the sector. The detailed CIERA results and methodology can be viewed online on Creative BC’s website and annual results are intended to be published each year in the fall or winter, soon after Statistics Canada datasets are typically released.

Additional Notes prepared by Creative BC



SHOUT OUT

We would like to thank those directly involved in the creation of the Music Strategy. We could not have done this without your enthusiastic support and commitment to the music scene.

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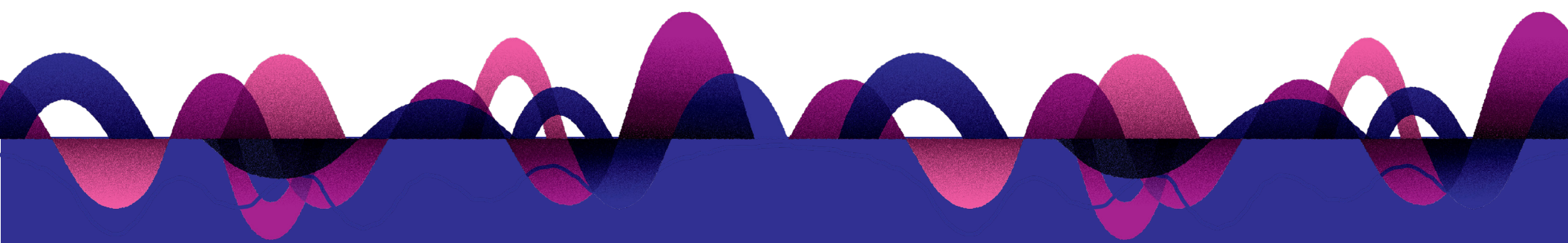
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Thank you to over 100 music sector professionals who participated in our roundtable discussions and one and one interviews.

Funding for this project was provided through the City of Victoria, FACTOR and Amplify BC.

Any opinions, findings, conclusions, or recommendations expressed in this material are those of the author and do not necessarily reflect the views of Creative BC or the Province of BC. The Province of BC and its agencies are in no way bound by the recommendations contained in this document.



Victoria
Music Strategy
2022-2026